A Corporate Model: Aligning National Nonprofit Expectations with Regional/Local Efforts to Serve the Mission

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A CORPORATE MODEL: ALIGNING NATIONAL NONPROFIT EXPECTATIONS WITH REGIONAL/LOCAL EFFORTS TO SERVE THE MISSION

by

Emma A. Powell

A dissertation submitted to the Graduate College in partial fulfillment of the requirements for the degree of Doctor of Philosophy
School of Public Affairs and Administration
Western Michigan University
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Doctoral Committee:

Matthew S. Mingus, Ph.D., Chair
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This study seeks to provide a body of knowledge and application of research to the national nonprofit audience. The focus is to study conditions that could lead to better alignment between regional staff understanding and implementation of the national expectations, by identifying alignment behaviors in five indicator areas. These indicators are fundraising, mission delivery, volunteer engagement, HR/operations, and PR/external communications.

Research in the areas of nonprofit structure design, motivation, and mission alignment continue to be significant to the sectors maturity and distinction. Corporate model nonprofit organizations structure is unique to other nonprofits within a local community. Understanding the corporate model design better illustrates the obstacles to and advantages of aligning knowledge and behaviors with headquarter expectations.

The context of this research is a comprehensive case study of a national corporate model nonprofit. A three phase data collection process was used. First, understand national expectations of the senior leadership team. Second, illustrate the perceptions of alignment from the direct-report management. Third, survey all staff to seek to understand perceptions within the entire organization about alignment and the causes/effects using the five alignment indicators. The study revealed that alignment is caused by a shared understanding of the indicator expectations and clear information dissemination allows each level of the organization to demonstrate behaviors that are aligned. This causal relationship is understood through the
theoretical application of resource dependency and reflexivity theory within all three phases of the research.
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CHAPTER I
INTRODUCTION

Mission statements communicate the purpose for the work of a nonprofit organization. Across the institution, mission statements guide value alignment and shared commitment to the organization. Shared commitment and values frame the norms for behavior. Together with the mission statement, the organization design can assist in value-modeling as well. O’Toole and Montjoy (1984) recognize that within a formal organization, investing in personnel who accept the mission and work of the organization helps create an organization that cooperates, which is the foundation of “alignment.” Formal design and employee selection techniques construct an organization and staff with a shared commitment to the work as well as a shared understanding of the behavioral norms. Additionally, hard to measure outcomes are more easily controlled when there is a shared commitment to the cause (Ben-Ner & Ren, 2015). Formal structures can support staff alignment, job responsibilities, or geographic needs. “Organizational structures are assumed to provide a pervasive foundation for achieving coordination and control within an organization” (Andrews, Boyne, Law, & Walker, 2007, p.59). Finally, because of varying motivations of staff/offices, organization design is important to implementing the organization’s work, purpose, and outcomes. Formal structures in conjunction with clear mission statements support the clarity of the work and the value of the organization.

National nonprofit organizations create the mission and retain it at the national level. The mission is extended to the regional sites as the accepted mission of all levels within the organization. Identifying behaviors as well as providing clear expectations are vital to determine
mission alignment between the national and regional offices. William Brown (2010) noted that organizational management entails shared understandings and agreement on the organization’s operations. “Agreement and consistency among organizational participants and structures” (p. 207) is the essence of alignment. The purpose of this research is to explore mission alignment between a national nonprofit and its multisite offices within the framework of a national corporate model nonprofit; seeking to understand how might local offices align behaviors to the mission statement, based on national expectations.

Often regional/local offices are seen as having “gone rogue” to support what an individual community needs and thus causes that office to stray from the accepted national mission. For example, a national breast cancer organization, whose mission is to eradicate breast cancer can be seen as mission drift when the local offices serve people who struggle with ovarian cancer in a specific community. This example of mission drift, where there is activity that does not directly support the intended mission (Jones, 2007), demonstrates the obligations many local offices feel to their constituents and in contrast, the potential for a lack of alignment from the national office.

The local/national dichotomy can also be seen as an intra-organizational collaboration. Previous studies like Aligning Forces for Quality (2007) and other interdisciplinary research demonstrates the value collaborative efforts can have on improving quality of products or services. Collaborating to streamline efforts and align mission-centric work is at the core of programmatic success and institutional growth (Sowa, 2009; Guo & Acar, 2005). However, discussion of intra-organizational alignment is lacking in the current literature, therefore the context of this research is the intra-organizational relationship between regional/local offices and the national headquarter office.
Statement of the Problem

National nonprofit design can be organized in essentially four ways. The mechanistic multi-level structure is a corporate design feature. In contrast, the federated, franchise and association design has less national regulation and more local control (Young, Bania, & Bailey, 1996). All four models use roles and oversight within the individual nonprofit. Power, at varying degree, is given within each of these multi-level designs and is demonstrated through a hierarchy.

Multi-level organizations are evident through four basic models of design. These four models of organization design are recognized in the literature as corporate, association, federated, and franchise models. Organization design is best understood as the internal scheme of the organization - the location of formal power and authority, chain of command and span of control, departmentalization of organization functions, specialization and relationships among work units, etc. (Ben-Ner & Ren, 2015; Foss, Pedersen, Pyndt, & Schultz, 2012; Kates & Galbraith, 2007). As such, organization design’s purpose is to create an environment where staff put forth effort on the organization’s behalf by aligning the organization’s goals with their personal goals (Galbraith, 1977).

Significant differences between the four nonprofit models are most obvious in the fiduciary and governing responsibilities as well as the tax exempt status at varying levels within these structures. A corporate nonprofit is a centralized national organization that includes regional/local offices, centrally directed and subordinate to the national organization. Additionally, a corporate nonprofit could be a “decentralized national corporation with local chapters that have limited discretion but are subordinate to the national organization” (Young, Bania, & Bailey, 1996). Example: Multiples Sclerosis, American Red Cross, and American
Heart Association. A franchise nonprofit model has affiliates across the geography each with a separate 501 (c) 3 status. The headquarter office provides the branding and name to each affiliate as well as other assistance in return the local affiliates pay a percentage or “fair share” to the headquarter (Oster, 1995). Example: Planned Parenthood. An association or trade model is unrelated organizations that are autonomous in a given field have joined in order to obtain information, support services, and communication with peers; support lobbying on relevant issues; and gain professional legitimacy (Young, 1989). Example: American Hospital Association, the American Association of Museums, and the Council on Foundations. Lastly, federated models are similar to the corporate model, both have local/regional presence, with a national hierarchy. However, authority over operations and programs is shared between the national organization and its affiliates within federations. Also, there is a likeness to association model nonprofits. However a federated nonprofit is a tighter knit association with a stronger center and reflects a national office that has authority of its own and responsibility for leadership (Young, Bania, & Bailey, 1996). There are varying levels of federated nonprofits; “at one end of the continuum are those federations with close affiliations in which the national organization exercises some control over its regional, provincial or local affiliates. They may have duel reporting structures in which local boards report to the national board and local staff report to their own board. At the other end of the continuum are federations that are characterized by a loose association of completely autonomous organizations” (Mollenhauer, 2009). Example: Make A Wish Foundation and the YMCA.

There is considerable research that explores nonprofit design models. The association/trade, federated or new franchise nonprofit models can be found extensively throughout the literature (Young, Bania, & Bailey, 1996; Grossman & Rangan, 2001; Young,
In contrast to past research foci, this study recognizes the hierarchical national nonprofit organization, specifically the corporate model. The corporate model is present in the sector with organizational design specifics that separate these nonprofits from other internal designs (i.e., franchise or association). For example, some key defining characteristics of the corporate model nonprofit include: a single tax identification number; one governing board that presides over the entire organization; a governing board with fiduciary responsibility. Additionally, local teams are the constructs of the principal office. These local offices are subject to headquarters’ direct control (Young, 1989). One explanation of a corporate model describes the operation specifics: “The Foundation’s local program is quite standardized throughout the country. The patient care program differs from county to county more in magnitude than it does in content, and the broad outlines of the organization are established by national headquarters and followed, with local variations, in most communities. All local organizations are subject to the same rules and regulations, and are in direct contact with national headquarters through one of its employees-the State Representative” (Sills, 1957).

**Design Structure Confusion and Changes**

The details of individual organizational designs can cause confusion. Understanding the organizational design differences between for-profit, government, and nonprofit has been researched (Ben-Ner & Ren, 2015). However, little attention has been given to the organizational design differences within the nonprofit sector. The above mentioned structures of nonprofits are the genesis to better understanding nonprofit structure; but even within this research, and multiple examples otherwise, we see a strain on the conceived definition of the individual models for the nonprofit sector. There continues to be overlap in understanding what constitutes a specific model, especially outside the scholarly arena. Most nonprofits, even
corporate models, want to embrace a local culture and claim to be grassroots, volunteer-driven, federated, or franchise. However, when specific criterion are posed it becomes clear that the organization is functioning in a corporate model; even while giving extreme respect to the “grassroots” efforts of local staff and volunteers. Thus, confusing the organizational design and understanding of power within the organization.

Nonprofits strive to evolve to meet the needs of a dynamic audience (Vioda, 2011). The requirement for the flexibility to serve appears to challenge most ideals of a corporate model nonprofit. When the regional chapter implements an “out-of-the-box” approach to a situation it can be daunting for the hierarchical nonprofit to respond in a way that addresses the need of the community while answering the societal demands to be efficient, transparent, and accountable as a single 501(c)3. Legal action, public scrutiny, and donor awareness creates a struggle for the board of directors to change its approach to the local offices (Carver, 1997).

Conversely, the hierarchical model calls attention to the strategy and policy functions of large nonprofits. Whereby, adopting levels of decision makers allows key leadership to accept growth mentalities to plan for the long-term success of the organization. This realization has been documented in the for-profit sector, primarily (Chandler, 1998). Here again, the literature shows opportunities for the organizational design to become confused by the needs of the organization and needs of the community.

Continuing the challenges of identifying and agreeing on the design within the organization we can review Immanuel Kant’s (1790) metaphor of the watchmaker. Kant explains that the design of the watch must happen first in the watchmakers ideas and then in production. The parts are used as a means to an end. Organizational leadership and design is created much the same way. The ideals of the organization, the mission, the growth, the human
capital, the structure, and resources are the flow of ideas to parts, just like the watchmaker. The reflexivity of the leadership is addressed as the societal needs change, the constituents grow, and the organization structure matures. The work can begin as a grassroots model or a federation and over time morph into a corporate model, at the will of the board.

**Mission Drift and Boundaries**

Mission drift at the local level can present itself as empowerment. The local office’s ability to be reflexive in serving its community via organizational resources regardless of specific mission impact can be argued as a community necessity. However, mission drift hurts the projected mission by misdirecting resources intended for the approved national mission. Instead, aligning behaviors, dollars, resources, and all capacities around a singular mission with clear focus provides an organizational premise that is uncompromising and relentless.

Multi-level organizations experience mission drift and lack of consistency across the levels without developed communication channels and shared understanding of expectations. It is the national office’s responsibility to ensure clarity and consistency of communication in an effort to guarantee shared understanding throughout the organization’s multi-level design. Shared understanding of mission, expectations, and success measures reduce uncertainty within the levels of the organization and better aligns the activities of all staff around the mission of the organization. Overarching, these norms of interconnectedness deepen the breadth and depth of the initiative; however they are not without structural rules or limitations. Therefore, boundaries are needed throughout organization environments. “Boundaries that stabilize the system too much become barriers that cause rigidity; an absence of boundaries leads to chaos” (Kelly & Allison, 1999, p. 87). “Boundaries”, as Kelly and Allison describe, are critical to a system’s interconnectedness. Boundaries clearly impact the perceived intra-organizational behavior and
collaborations. A corporate model nonprofit utilizes boundaries within the organization to better define the relationships and mutual dependency needs of the organization.

Corporate model nonprofit organizations have a structure that is unique to other nonprofits within a community. This research provides a better understanding of aligning field staff knowledge and behaviors with headquarter expectations. In addition to the collaborations there can also be dissonance between the regional office and national office. To best serve the national mission regional employees must have a shared understanding and be informed of the expectations from the national office. In addition, they must be willing to act according to that expectation and commitment to the mission. This demonstrates a shared understanding of key behaviors, outcomes, and metrics that meet such expectations. Aligning these behaviors to the national expectations should also take into account topics such as community needs, market-based research distinctions, demographics, strategic plans, or big-picture movements. These local variables are unique to each community and critical to understanding the needs of the service area. Failing to identify and acknowledge distinct community perspectives could cause constituents and staff to doubt and fear the national direction or organizational purpose. That disconnect would contribute to a reduced shared understanding of expectations and a lack of mission alignment.

National nonprofit offices rely on their ability to galvanize their local offices to take action in a meaningful way. It can be assumed that behaviors and shared-commitment are motivated by the organization’s mission (Hearld & Alexander, 2014). How that commitment translates to behaviors is determined by the shared understanding of expectations across the organization. A commitment to the mission of the organization in conjunction with an
understanding of critical behaviors, outcomes, and metrics will demonstrate organization alignment throughout the multi-level organization.

The corporate model literature includes a core premise of power within the design. This design is hierarchical and governing power remains at the top of the organization chart. It is also less understood or tested through the literature. Dissonance between the levels of the organization can be rooted in:

- Lack of open dialogue between national and local offices,
- Lack of trust,
- Evaluation/judgment perceptions,
- Fear of comparisons between offices, and
- Negative stigma/perspective of local offices “failure.”

Lack of alignment to the organization’s mission is manifested in behaviors that demonstrate the intra-organizational dissonance, noted above. Creating and maintaining boundaries within the hierarchy provides clarity of roles and responsibilities to employees. A corporate model nonprofit utilizes boundaries within the organization to better understand these relationships and mutual dependency needs within the organization.

**Purpose of the Study**

The purpose of this study is to explore causes and effects of mission alignment, or lack thereof, more specifically, how a shared organizational commitment and a shared understanding of behaviors, outcomes, and measurements can indicate mission alignment throughout the organization. In this research, mission alignment will be generally defined as a shared commitment to the organization’s purpose as well as a shared understanding of the behaviors,
outcomes, and measurements of the regional offices compared to the expectations and communication of the national office. The areas of fundraising, mission delivery, volunteer structures/community engagement, HR/operations, and PR/external communication will be used to identify organizational alignment.

The context of this research is a comprehensive case study of the National Wild Turkey Federation (NWTF) to explore mission alignment using a set of broad indicators. Additionally, this case study highlights the federation/corporation name confusion, discussed earlier. The name of the organization was crafted in 1973, 43 years ago. It has since grown from a fully federated model into a corporate model with only a few “federated” tenets left in its design. Ultimately, the NWTF is structured as a corporate model organization and will be considered as such in this case study. The five variables were identified as critical to the National Wild Turkey Federation’s alignment concern.

The NWTF has an executive leader on the senior leadership team who is responsible to understand/define expectations for each indicator. The five selected indicators are present in corporate model nonprofits through a variety of activities and expectations. These variables will be vetted across the organization to illustrate the causes and effects of mission alignment through a shared understanding of behaviors, outcomes, and metrics between the national office (i.e. NWTF executive leadership team and management) and the regional offices (i.e. staff, statewide employees, and field staff). Moreover, this study may provide knowledge to the local/regional offices to better understand their current efforts compared to the directives of the national mission/purpose.

The research study explores alignment variables through multiple levels of data collection to determine shared understanding of each variable across the organization, which
provides a new insight to the importance of shared understanding of each variable. Therefore, alignment can be identified intra-organizationally and understood from the perspective of the two critical levels of the corporate model’s organizational design (national and regional).

**National Wild Turkey Federation Mission and Purpose**

The National Wild Turkey Federation (NWTF) was founded in 1973 as a support organization to help wildlife agency efforts revitalize the wild turkey population across North America. In the first 30 years the organization increased the turkey populations from 1.5 million to approximately 7 million. The organization achieved their mission! Today the mission to revitalize the turkey population is only a component of the work. The NWTF uses the North American Model of Wildlife Conservation (Organ et al., 2012) to achieve their new mission; to conserve the wild turkey population and preserve our hunting heritage. The North American Model believes seven basic principles and the NWTF credits these core principles as the foundation of their success. These include:

1. Wildlife is public property
2. Science is the basis for wildlife policy
3. Hunting and fishing laws are created through a public process
4. Everyone has the opportunity to hunt
5. Wildlife shall be taken only by legal and ethical means
6. Wildlife cannot be slaughtered for commercial use
7. Wildlife is an international resource
With the seven principles in mind the NWTF has crafted the Save the Habitat. Save the Hunt. initiative and the 2016 Strategic Plan (Appendix A). The organization is adapting quickly to respond to the conservation needs and policies that plague the hunting tradition.

**Conservation across the Country**

NWTF conservation experts identified regions across the country with similar ecosystems and conservation issues. Six areas of concern were established to help identify the most urgent needs and better monitor conservation objectives. The “Big Six” are America’s Western Wildlands (Figure 1), America’s Great Open Spaces (Figure 2), America’s Crossroads (Figure 3), America’s Mid-South Rebirth (Figure 4), America’s Southern Piney Woods (Figure 5), and America’s Colonial Forests (Figure 6). Each region is identified by their landscape, habitat, weather, natural resources or other defining characteristics.

**Figure 1. America’s Western Wildlands**

**Figure 2. America’s Great Open Spaces**

**Figure 3. America’s Crossroads**

**Figure 4. America’s Mid-South Rebirth**

**Figure 5. America’s Southern Piney Woods**

**Figure 6. America’s Colonial Forests**
Predominate conservation challenges in the 6 areas are listed as:

- improve habitat diversity
- improve forest health
- improve pine management
- improve water quality
- increase winter wildlife survival
- maintain healthy hardwood forests
- restore oak woodlands and savannas
- restore prairies
- stop habitat loss

The NWTF believes that this model will impact the sustainability of species and habitats across large landscapes. Thus, responding to the Save the Habitat. Save the Hunt. initiative. (www.nwtf.org/about/big-six).

**NWTF Four Fundamental Goals**

Chapter VI discusses the 2016 Strategic Plan as it relates to the research data, however it is important to understand the four fundamental goals that the 20016 Strategic Plan has outlined for the NWTF. These goals are success metrics demonstrate a more holistic approach to measuring the success of the organization, beyond the traditional annual fundraising goal metric.

These four fundamental goals are (NWTF Strategic Plan, 2016):

1. Conserve or enhance at least 4 million acres of wildlife habitat by 2022.

   “Through our volunteers and partners, the NWTF will provide the highest quality habitats that foster abundant wild turkey populations and other wildlife and create exceptional places to pursue hunting and other outdoor activities” (pp. 6-7).
2. Create 1.5 million hunters by addressing barriers to participation and opening 500,000 acres to hunter access but 2022.

“The NWTF will uphold and preserve our hunting heritage by engaging our passionate volunteers to share the culture and lifestyle they cherish through efforts focused on recruitment, retention, and reactivation and providing a social support network to new or reactivated hunters” (pp. 6-7). Creating more hunters has an economic impact as well. The NWTF states “We’re securing the future of the North American Model of Wildlife Conservation by increasing the number of hunters, who pay for 80 percent of wildlife conservation through excise taxes on guns, ammunition and more” (www.nwtf.org/about/save-the-habitat-hunt).

3. Increase the nationwide population of wild turkeys to 6.7 million in agreement with state wildlife agency management objectives.

“The NWTF will use the best available science and techniques to achieve healthy, well-managed wild turkey populations in all suitable habitats to provide quality hunting experiences” (pp. 6-7).

4. The NWTF will increase annual gross revenues to $82 million and grow adult membership to 225,000 by 2022.

“The NWTF will focus on long-term organizational growth and stability to ensure efficient mission delivery” (pp. 6-7).

**Primary Regional Staff Positions**

The two prominent regional staff positions across the country are the Regional Biologist and the Regional Director. The positions often overlap within the region and collaboration is encouraged between the two staff titles. The Regional Director is responsible for volunteer recruitment and communication, organizing and servicing all NWTF committees and fundraising
events/activities within the assigned region. The Regional Biologist is responsible for all facets of the NWTF’s habitat conservation, wild turkey, and upland wildlife management programs throughout the country.

**Policy Positions and Advocacy**

The advocacy arm of the organization focuses on multiple areas that affect the four goals in the strategic plan. One is providing greater land access to ensure hunters have places to hunt. “There are 38 million acres nationwide of federal public lands that are not accessible to the public as they are landlocked by privately owned lands or are federal public lands…These public lands can be made more accessible by securing conservation easements, other rights of way, or fee-title purchases of private lands from willing sellers” ([www.nwtf.org/hunt/article/the-importance-of-access](http://www.nwtf.org/hunt/article/the-importance-of-access)). An additional example of policy efforts is included as Appendix B; a Memorandum of Understanding between the National Association of State Foresters and the NWTF to “support activities that promote active forest management…” (MOU, 2015).

**Theoretical Frameworks**

Theory is a paradigm to provide facts and observations with a sense of relevancy. A theoretical lens ensures these data are not overlooked or simply misperceived. Theory can be an explanation of how things are, and practice is the application of knowledge that will solve real-world problems (Robson, 2011). Therefore, this research will produce analysis through resource dependency and reflexivity theoretical approaches.

The relationship between the national and regional office can be better understood using these two theories to structure the hypotheses being evaluated. Resource dependency theory frames the hypotheses that seek to explore the relationship between the national and regional
offices at the organizational level, whereas reflexivity theory frames the hypotheses that understand the individual behaviors within multiple levels of the organization. Seventeen hypotheses are evaluated to understand how resource dependency and reflexivity theories are relevant within the structure of a corporate model nonprofit.

**Framework One: Resource Dependency**

Pfeffer and Salancik (1978) coined Resource Dependency Theory (RDT) in their attempt to better understand the relationship between organizations that rely on one another within environmental constraints. The idea that organizations have a seemingly mutually dependent relationship for resources is the founding principle of RDT. Much of RDT is considered in the context of multiple organizations across the sector however, there is value in understanding resource dependency needs from all stakeholders of an organization. In that, corporate model nonprofits have many stakeholders. A critical realization is that the regional/local offices are in fact stakeholders of the headquarter office and vice versa. This mutual dependency between the national office and the local office for resources has an effect on the other. Intra-organizational stakeholders, (local or national offices) are often seen as having rights; this research recognizes the responsibilities (in addition to the “rights” as dictated by the organizational design) of both entities to the other for streamlined mission work (Fassin, 2012). This framework will be more thoroughly articulated during the review of the literature (Chapter II).

**Framework Two: Reflexivity**

Reflexivity theory moves from a technical rational to acknowledge an inconsistent ability to apply scientific theory and technology to all decisions. The reflexivity of a practitioner allows for reflection on behavior to shift for nonprogrammed decisions. Reflexivity is the methodology used to navigate tensions (Hill & Holyoak, 2011). Through reflexivity, new sense can be made
of repetitive experiences (Schön, 1983). Moreover, Schön says a reflexive practitioner “does not keep means and ends separate, but defines these interactively as he framed the problem” (1983, p. 68). This study seeks to understand how reflexivity-in-action creates a relationship model and joint understanding of expectations and abilities. Chapter II discusses the theory of reflexivity in more detail and in relation to the public administration lens.

**Research Questions**

The author seeks to better understand the intra-organizational resource dependent relationship by studying the interdependence of the levels within a corporate model nonprofit. In addition, the reflexive behaviors of individuals will be assessed to better illustrate the need for individual behaviors to align as well as intra-organizational behaviors.

The overarching premise for the study seeks to understand the extent that regional/local office knowledge and behaviors align with the expectations and mission of national headquarter nonprofits using five variables as measurement and the shared understanding of each variables behaviors, outcomes, and metrics. Six main research questions are used in this study:

1. How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables?
2. To what extent do regional offices/field staff believe their local office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.?
3. Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided?
4. To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance?

5. What mechanisms are in place for the national office to evaluate regional sites and what is evaluated?

6. What are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the alignment indicators?

These supporting questions will be answered through the evaluation of the hypotheses. Each hypothesis is uniquely constructed within the framework of one or both of the abovementioned theoretical concepts and is discussed at more length throughout the methodology chapter.

**Overview of Context and Methods**

Organization alignment of behaviors can be defined using multiple variables. This study will use five variables (fundraising, mission delivery, volunteer structure/community engagement efforts, operational/human resource efforts, and public relations/communication models) to understand local alignment to national expectations. The understanding of the variables and how they are measured will be further developed in the methodology.

Mission commitment, activity, and resource alignment between national headquarter and local/regional offices focusing on national expectations compared to local knowledge and behaviors is illustrated; determining if there is a shared understanding of the behaviors, outcomes, and metrics for mission alignment and where there is a gap in the shared understanding and thus alignment between the organizational levels. Within the study, each
variable is explained by the senior executive team and then explained by the management staff and lastly explained by regional office staff. The triangulation demonstrates the importance of shared understanding, whereby the national office may see that individual offices are well-aligned in shared commitment to the mission and specific variables but may be less aligned in others. Proper training and resources can be identified to strengthen those regional offices, using this intra-organizational alignment research.

This is a comprehensive single case study (Yin, 2014) of a national nonprofit organization, the National Wild Turkey Federation that has local offices across the country. A concurrent and transformative mixed methods case study design approach is used (Creswell, 2013; Creswell & Plano-Clark, 2001; Tashakkori & Teddlie, 2010). Data will be collected via multiple sources of information (e.g. observations, interviews, audiovisual materials, and documents and reports). As a single case the unit of analysis is a within-site study (Creswell, 2013). The qualitative study will be conducted on-site at the national and local offices. The senior leaders at both levels will be interviewed. In addition, a web-based survey will be distributed to all employees throughout the organization for quantitative analysis. The initial research is focused on one organization to begin to understand the need and validity of the alignment question. This research is a “stepping stone” with intent to offer additional value to the importance of clear messaging, directives, and expectations; starting at the shared understanding/definition level. The methodology will demonstrate a better understanding of: the individual alignment measures, a perspective on regional needs compared to national organizational efforts, and implementation successes and gap measures.
Significance of the Study

This study provides a body of knowledge and application of research to the national nonprofit audience. The focus is to better align national nonprofit structures by implementing a process that 1) recognizes the alignment indicators relevant to the individual organization, 2) identifies an indicator definition and understanding at each level of the organization and 3) provides an alignment assessment based on shared understanding of the indicators. This allows the national office to recognize the mission alignment strengths and weaknesses between offices.

This study is significant to the field of nonprofit design, motivation, and mission application research. While much of the recent research strives to understand the association or franchise nonprofit models this study seeks to better understand the corporate national nonprofit organizational model. It extends previous knowledge of organizational design, leadership, and communication to the nonprofit corporate model framework.

Additionally, the research contributes to the literature by utilizing a theoretical review of this organization design which furthers the value of resource dependency and reflexivity in the realm of public administration. Through the use of these theories, real behaviors can be addressed which can reset the norms of institutionalized hierarchical models.

Summary

The intention of this research was to explore mission alignment between a national nonprofit headquarters and the local/regional offices. The National Wild Turkey Federation, was selected to participate in a three-phase mixed methods case study design for this purpose. The first phase was comprised of qualitative interviews to understand the expectations and boundaries from the senior executive leadership team. The second phase consisted of responses
from the direct reports of the executive leadership team and the third phase was a comprehensive electronic survey to all paid staff of the NWTF. The survey addressed the shared understanding of mission alignment and expectations, as perceived by each staff.

This research seeks to understand how might fundraising, mission delivery, volunteer structure/community engagement efforts, operational/human resource efforts, and public relations/communication models might be measured to assess, acknowledge, or improve field staff alignment with the national directive. Additionally, recognizing that resource dependency and reflexivity in decision making will allow for a better model of expectations and communication dissemination.

Chapter II provides a deeper understanding of the literature around nonprofit structures, accountability and currently recognized evaluation models, as well as the resource dependency and reflexivity models in theory and in public administration practice. Chapter III presents the methods and procedures of the study. Subsequently, an examination of the data in Chapter IV and V communicates the findings of all three phases of data collection. Lastly, there is a discussion in Chapter VI to better understand the cause/effects of alignment behaviors using the five variables throughout the research.
CHAPTER II
LITERATURE REVIEW

Mission-centric activity is vital to a nonprofit organization. The mission is the reason people engage and stay. How the mission is activated, guided by expectations and behaviors, frames the organizations need for hierarchy or design structure, resources and talent. The organization design provides guidance for this framework and accountability efforts. This research specifically considers the corporate model nonprofit and how expectations are communicated, understood, and measured.

A corporate model nonprofit organization is characterized by “unitary national organizational entities with regional and local subdivisions and chapters” (Young, 1989, p. 103). Corporate models have been established as local versions of the national entity and authority is held at a singular national headquarter space. Within the corporate model, local offices exist only at the direction of the national decision and are at its undeviating decision-making command (Young, 1989).

These offices must stay focused on their single organizational mission. In fact each office should be firmly rooted in the purpose, brand, and values of the national organization. However, even with the best of intentions a disjuncture between the accepted mission and the local behaviors based on the community’s immediate needs plague local nonprofits. This mission drift typically stems from a desire to “help” a local constituency and ultimately overshadows the specific call for the organization’s work. Curbing mission drift is only possible through clarity and understanding of expectations and evaluations. Jonker and Meehan (2008)
suggest that a mission statement that is sharply focused can give organizations the motivation and clear decision-making criteria required to respond to difficult assignments. The local office can focus their efforts by turning back to a clear mission statement in an effort to remain aligned to the work of the national directives, for the cause.

National nonprofits struggle to embrace the local needs of their offices while they balance the cookie-cutter administration and evaluation measures across all of their offices. Organization models, resources, evaluation and stakeholder perspectives are used to better understand the expectations of local offices from a headquartered nonprofit. In addition to corporate model assessments, community assumptions and local office accountability to multiple stakeholders internally and externally are associated with the local entity.

The literature offers an extensive review of the nonprofit model classifications and the multiple ways national nonprofits can vary in organizational structure and design, internal and external accountability, organizational resource dependent behavior, and the reflexive interpersonal factor of the headquarter/local office dichotomy.

**Organizational Structure and Design**

A crucial part of the relationship within the levels of the corporate model organization is centered on the hierarchy, communication tools, and model for power. Here literature is reviewed that recognizes the dynamics of nonprofit headquarter/regional relationships.

National nonprofits carry out their mission at the local level via field staff. Programs and services happen locally and much of the day-to-day operations are coordinated through local offices (Oster, 1995). This realization demonstrates a key example of the continued responsibility struggle and time intensive decision-making model national organizations must
utilize to proceed with ground-level initiatives, and vice versa (Grossman & Rangan, 2001). These branch offices continue to standardized and centralize for unified national control of their brand, services, and identity (Young, 1989).

The Burns and Stalker (1961) mechanistic and organic descriptions of organizational design begins to explain efficient and performance-based models. New models move beyond such a basic understanding of organizational structure and instead find value in a reorientation toward client service and fitting the organization into its “strategic environment” (Schoichet, 1998). Grossman & Rangan (2001) support the optimization of organizational forces stating that “headquarters should undertake actions to enhance systems value and then sustain it, and affiliates should maximize local resources to enhance their credibility… A healthy tension between headquarters and operating units over their respective roles will emerge” (p. 335).

The National Wild Turkey Federation (NWTF) employs multiple brand management staff and leadership to ensure cohesive marketing and message dissemination throughout the country under one umbrella. Young continues to note that national nonprofit associations face critical organizational issues like communication, local autonomy, resource dependency, varying demographics to serve and cultivate. These concerns were all present at the NWTF and discussed in the analysis in Chapter VI.

The most relevant models of multisite national nonprofit entities are described throughout the literature as: “trade”, “federal” and “corporate” (Young, Bania, & Bailey, 1996; Grossman & Rangan, 2001; Young, 1989, Zald, 1970). This study will focus on the corporate model nonprofit organizations characterized by the national headquarters, a single tax exempt code, one national governing board with financial control, multiple local offices across the country, and a singular mission. This creates a model where local entities are governed by the same nationally
sanctioned rules and have a connection to the national headquarters via a hierarchical structure and communication channel (Sills, 1957). Corporate models of national nonprofits are ultimately owned and controlled by the central entity (Zald, 1970). Examples of organizations with corporate models include the American Red Cross (as of approx. 2008), Alzheimer’s Association, Juvenile Diabetes Research Foundation, National Multiple Sclerosis Society, and the American Cancer Society. The benefit of multisite nonprofits, under the corporate model, is their ability to serve a national cause while creating a local relationship with constituencies. These multisite offices are expected to be responsive to multiple stakeholders as they can reach across the geographical constraints of the national office (Tschirart, 1996).

The other two models found in the literature that describe the national/local nonprofit structure are “trade” and “federal” (or “federated movements”). A brief understanding of these additional descriptors allow the reader a better comparison of the intention and differences found within the corporate model (see Table 1). Trade associations are membership based, autonomous organizations joined to gain information, support and communication as well as lobbying efforts. In trade organizations Young (1989) notes the relationship between the membership and its national office is predominantly a fee requirement. Examples of trade models are the American Hospital Association or the Council on Foundations. The federated national movements are unique from the other two models due to their control mechanism. Headquarter organizations are controlled by the local units which have chosen to participate in a larger organization. Local offices are autonomous but share a mission (Young, 1989). Examples of federated national movements or federal-type models are the YMCA and Goodwill Industries.
Table 1

*Features of structure design* (Young, 1989, p. 105)

<table>
<thead>
<tr>
<th>Feature</th>
<th>Trade</th>
<th>Corporation</th>
<th>Movement (federal)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanism of central influence</td>
<td>Quid pro quo</td>
<td>Statutory authority</td>
<td>Leadership and persuasion</td>
</tr>
<tr>
<td>Locus of authority</td>
<td>Members</td>
<td>Central Office</td>
<td>Members</td>
</tr>
<tr>
<td>Which came first?</td>
<td>Members</td>
<td>Central Office</td>
<td>Members</td>
</tr>
<tr>
<td>Uses common logo</td>
<td>No</td>
<td>Yes</td>
<td>Usually</td>
</tr>
<tr>
<td>Uses common name</td>
<td>No</td>
<td>Yes</td>
<td>Usually</td>
</tr>
<tr>
<td>Charters local members</td>
<td>No</td>
<td>Yes</td>
<td>Sometimes</td>
</tr>
<tr>
<td>Promulgates standards</td>
<td>Sometimes</td>
<td>Yes</td>
<td>Often</td>
</tr>
<tr>
<td>Adherence to standards</td>
<td>Voluntary</td>
<td>Mandatory</td>
<td>Suggestive</td>
</tr>
<tr>
<td>Members are individually incorporated</td>
<td>Yes</td>
<td>No</td>
<td>Usually</td>
</tr>
<tr>
<td>Has national personnel system</td>
<td>No</td>
<td>Yes</td>
<td>Partial</td>
</tr>
<tr>
<td>Members’ decision making autonomy</td>
<td>High</td>
<td>Low</td>
<td>Moderate to high</td>
</tr>
</tbody>
</table>

**Corporate and Federated Confusions**

The corporate and federated model have similarities that make it difficult for even the organization to identify its overarching structure. The by-laws describe the power and authority within the organization, however the culture and organizational norms can challenge the by-laws in day-to-day behaviors. The national office walks a fine line of serving the regional office and volunteers or being served by the regional office. Because of this need to appear decentralized, national boards have feared appearing too authoritative and have opted for a loss of control. They avoid usurping power over the regional offices to ensure staff and volunteers remain
passionate and committed to the organization, threatening the shared understanding of success variables for the national mission (Carver, 1997).

In an Association Management article (2003) the federated model was described as having a “diverse nature of governance ranging from board control to shared governance practices…suggesting that there is no best [national] structure” (p. 22). The article continues by addressing the federated model’s shared power structure is stifled by the lack of opportunities to exercise power, deemed by the national office. This conflict between the old framework and the evolved organizational identity must be reconciled with the demands of new environment and challenges (Brilliant & Young, 2004). Thus, inadvertently creating a corporate nonprofit decision-making model. Brilliant & Young (2004) continue by explaining the struggle federated organizations may have because of varying roles imposed on them at multiple levels of the organization but also because “they have difficulty shedding old identities” (p. 26).

Organizational life-cycle research concludes that the organization seeks to increase their capacity over time. The conflict begins when the capacity increase creates a new need for more structure. Advanced structural designs address initial conflicts of capacity while creating new hierarchical challenges of power (Selsky, 1998). A component of the federated model is the decentralized local decision-making authority however, multiple component so of each office are also centralized. The concern in labeling and identifying corporate versus federated models is that what is centralized is not the same across all federations making it difficult to determine when a corporate model becomes a federation and vice versa.

Beyond the scope of this research is an additional model stemming from the federated design called the franchise model. Oster (1992) argued the benefits of designing national nonprofits like franchises in an effort to balance the struggle of brand responsibility with local
responsiveness for mission-centric behavior. While this is a newer model to the nonprofit design conversation there seems to be a growing number of organizations considering the franchise approach. The corporate model could seek to transition into this design by giving autonomy to the local offices and restructuring current bylaws and governing practices.

**Shared Commitment and Shared Understanding**

A nonprofit organization thrives on employing those with shared values. Staff that believe in the work of the organization confirms one tenant of Public Service Motivation. PSM touts employees that are motivated by not only the monetary rewards the organization can provide but more importantly the impact of serving the mission (Clerkin & Coggburn, 2012; Ertas, 2014; Taylor & Taylor, 2011; Rose, 2012). However, creating a culture of shared commitment is not synonymous with a shared understanding. Shared understandings are determined by perceptions, communication, and messaging whereas shared commitment is the passion and determination to dedicate the time to work toward a joint goal (typically the mission of the organization).

**Shared Commitment**

Shared commitment is the “buy-in” staff has toward the overarching mission of the organization. Loyalty to the cause and an obligation to produce mission results are effects of shared commitment. Commitment stems from a passion for a cause and trust in the organization. Organization leadership teams need to present their intentions and purpose in an effort to build trust.

In the book *Crucial Conversations*, Patterson, Grenny, McMillan, & Switzler (2012) discuss a model of creating a shared pool of meaning to create trust and loyalty. This pool of meaning is based on the commitment all participants have to the cause. Using a commitment to
the mission, a decision, or task completion participants can work to open dialogue in a way that extends beyond the overarching commitment but instead begins to create shared meaning and intends to produce a model of shared understanding. Lt. Gen. Perry L. Wiggins suggests that “shared challenges call for shared solutions and commitment…to align efforts in support…” (2015, p.188).

**Shared Understanding**

The literature is inconsistent regarding how the idea of shared understanding is operationalized and measured. Instead, we approach shared understanding as one antecedent to alignment. In that construct shared understanding is creating a common framework that supports reinforcing activities which align shared commitment with behaviors. Shared understanding is based on the “overlap of understanding and concepts among group members” (Mulder & Swaak, 2002, p. 36). In that, Bittner and Leimeister (2014) generated a new definition of shared understanding to mean: “the degree to which people concur on the value properties, the interpretation of concepts, and the mental models of cause and effect with respect to an object of understanding” (p.115). Developing a shared understanding is also meant to consider external factors, such as physical proximity, incentives, communication support, and organizational culture (Deshpande, 2005; Hseih, 2006; Kleinsmann & Valkenburg, 2008; Langan-Fox, Anglim, & Wilson, 2004).

Creating such a shared understanding allows for deeper functioning teams and higher performance outcomes (Mohammed, Ferzandi, & Hamilton, 2010; Salas, Fiore, & Letsky, 2012; Wildman *et al.*, 2012). Additionally, work alignment and task coordination between staff improves effectiveness (Mohammed *et al.*, 2010). Alternatively, a perception of different goals or misaligned strategies could be demobilizing and inefficient. Therefore creating shared
understanding allows members to trust their abilities and better align efforts to achieve success (Aube, Rousseau, & Tremblay, 2015).

The literature suggests that creating a shared understanding is steeped in reflexive behavior, “which involves discussing common goals and how to achieve them” (Aube et al., 2015; Van Ginkel & van Knippenberg, 2012). Hermon (1996) cited, “understanding the role communication plays in building understanding…is imperative” (p.439). Additional authors posit that regular dialogue between members, organized training, team-building and strategic planning activities also support the creation of shared understandings (Cannon-Bowers, 2007; Mathieu, Maynard, Rapp, & Mangos, 2010).

The literature acknowledges the idea of perceived shared understanding, which is the extent to which members believe they agree with each other concerning the work that needs to be done (George & Zhou, 2001; Hinds & Weisband, 2003). Perceptions of shared understanding are the center of this mission alignment inquiry. Ultimately, exploring if there is actual shared understanding, perceived shared understanding, or actual shared understanding of the expectations and alignment behaviors. Designing organizational processes that support the construction of a shared understanding from a basis of a shared commitment creates alignment in purpose, deliverables, and direction for the entire organization.

**Accountability**

The accountability literature reviewed for this research considers organization behavior expectations and multiple evaluation processes. Accountability begins with defining the behaviors, outcomes and metrics that align with expectations. This frames the shared understanding of mission alignment and measurable expectations. This literature illustrates
current accountability practices as well as how expectations are created, communicated, and necessary for appropriate accountability measures.

Standards of accountability are muddy across the nonprofit sector. Managers within the arena are working to implement wider measures to respond to the heightened need to demonstrate transparency and outcomes as a measure of new expectations (Ospina, Diaz, & O’Sullivan, 2002). The National Council of Foundations (2015) suggests that when the nonprofit has shown to be accountable for its actions clients and consumers will return to that organization, and recommend that nonprofit to others. This goodwill, earned through accountable and transparent practice, is potentially the most important of its assets.

Organization design provides norms, stability, and demonstrates internal organization values. A centralized decision-making hierarchy reflects a limited distribution of power across the organization (Andrews, Boyne, Law, & Walker, 2007). Therefore, accountability measures are determined by the headquarter office. Organizations with clear and motivating missions are able to innovate, adapt, and compete for “customers” and funds (McDonald, 2007), thus creating variables to measure success as indicated by the national office.

Creating and evaluating the shared understanding of the alignment indicators is the responsibility of the senior leadership. The shared commitment to the mission and the understanding of alignment expectations is the responsibility of the individual staff. Returning to the organization’s mission creates a better understanding of alignment behaviors, consistent through the structure.

Expectations

Accountability is based on expectations and responsibility for actions. This cannot be completed without context asking, accountable to whom and for what? Young (2002) notes that
“nonprofit organizations are accountable for achieving the missions for which they have been established and granted special societal benefits and they are responsible ultimately to society as a whole for achieving those benefits” (p. 4). There are limitations to this definition. As Young presents this ideal, it speaks to the responsibility of the board of trustees for final accountability. Addressing multiple stakeholders at varying levels of the organization is a requirement and skill at the local level/branch office. Expectations are defined in multiple ways and can be placed on the office by fluctuating interests. Kearns (1996) offered insight into the work of the organization and held that the nonprofit is accountable to the public expectations and organizational goals. Citizenry is segmented by geography, demographics, and cause interest. Inevitably, there will be dissimilar expectations that varying offices must meet to be considered accountable to the citizens expectations. These expectations are internal and external in nature and manifest themselves in formal and informal measures. To produce a win-win for these capricious stakeholders local-level managers work strategically to adapt for the turbulent external accountability relationships (Romzek, 1996).

Clarity of how expectations are decided, communicated, measured and from what stakeholder are they evaluated describes the concept of shared understanding of intra-organizational alignment. The literature continues to frame an understanding of how a regional offices can discern opportunities to meet the demands of the local stakeholders and fall in line with the expectations of the national office measurements. Communication distribution within and between the levels of organizational structure are an important feature of equitable and transparent behavior of shared understanding leading to alignment (Yasmin, Haniffa, & Hudaib, 2013).
In the context of this study accountability expectations from the national office to the regional office are evaluated. Defining and evaluating approved behaviors and outcomes might extend this accountability definition in a more meaningful way. The research explores accountability categorized in three key areas: finances; fairness toward employees, contractors, clients, and citizens; and performance (Behn, 2001). Behn highlights that accountability should cover the expectations of the citizens and that accountability measures range from engaging standards for personal behavior in addition to expectations for organizational performance (Ospina et al., 2002). Inevitably, there will be dissimilar expectations that varying regional locations must meet to be considered accountable to the citizens and accountable to the national office’s expectations.

**Evaluations**

In addition to expectations, this research understands that accountability can be measured through varied evaluation systems. However, there is a disjuncture between multiple stakeholders (internal and external) and the expectations that are evaluated. (Fletcher, Guthrie, & Steane, 2003). Evaluation measures need to be clearly understood by all staff and priority should be given to those expectations that support the mission. “Primary measures of performance then focus on the activities specified in the organizational mission, goals, and objectives” (Green, Madjidi, Dudley, & Gehlen, 2001, p. 460).

The nonprofit evaluation literature calls attention to a sampling of tools that have been created for the nonprofit use. Nonprofit evaluation tools can be used once organizations are clear about the social results they are seeking, the strategy to produce those results, and the ways in which the results can be measured (how is success defined?) (Moore, 2003). A ranking system is often adopted in multisite nonprofits where information is reported back to the headquarters.
which allows for uniform criteria and the national office produces overall rankings where awards and recognition are given (Green et al., 2001). The literature is limited for intra-organizational evaluation tools, specifically designed to open dialogue for coaching and resource needs between local and headquarter offices. The static pictures of the organization are typically outward-facing and pay most attention to the external environment’s perception of the performance variables identified.

The use of evaluation models can demonstrate the perceived value of reward/punishment mechanistic behavior and provide an excellent opportunity to see the organization as a whole in a dashboard view. With that said, evaluation models lack a realistic understanding of changing expectations, clear descriptions of success in multiple categories, and a possible shift in the use of the information collected, thus challenging to what extent each office is aligned to the mission as expected by the national office. In this research the balanced scorecard, public value scorecard and the multidimensional, integrated model of nonprofit organizational effectiveness are a sampling of traditional evaluation models nonprofit organizations have used to demonstrate stakeholder accountability.

**Balanced scorecard.** Expectations directly link to the evaluations tools. Clearly understanding the mission and purpose of the work that is being directed from the national level allows for a united approach to the expected outcomes. The Balanced Scorecard (Kaplan & Norton, 1992) was developed to satisfy accountability questions in the for-profit sector speaks to four principles that are designed in rank order of importance for success evaluation in most for-profit organizations. They are:

1) The financial perspective

2) The customer perspective
3) The internal/operational perspective

4) The learning and growth perspective

Figure 7 illustrates the original intent of the Balanced Scorecard as an evaluation tool within those four parameters.

![Figure 7. The Balanced Scorecard: The Four Perspectives (Kaplan, 2001)](image)

The nonprofit sector struggles with ways to measure and therefore Kaplan’s translation of the business-sector’s Balanced Scorecard has been a welcomed step forward. This tool provides the nonprofit sector with one tool that supports quantifying and measuring strategy in an effort to limit ambiguity about desired outcomes (Kaplan, 2001). He continues to adapt the nonprofit scorecard by including the mission at the highest level of the card, see Figure 8. Additionally, he says that top-level scorecards should be communicated throughout the organization in an effort to better align day-to-day actions to achieve the strategic goals (pp. 361-363).
The criticisms of the Balanced Scorecard in nonprofit practice include: 1) the importance of the financial measurement. Nonprofits often work in intangibles therefore strictly relying on financial measurements limits the value of the mission work that is not measured in terms of finances, but instead human good, public interest, and services. These intangibles are measurements of the overall strategy. Simply looking at financial results disregards the strategic questions of mission viability. 2) “Bottom line” evaluation is historical and limits forward-thinking as measurement variables. Focusing on past performance reduces innovation (Moore, 2003).

While the Balanced Scorecard has offered a more holistic approach to the organization evaluation in turn it has created some systematic confusion in application of best practices and how it has been adapted from a for-profit sector to “fit” the nonprofit model. Is it a tool that can be used to align the national expectations to the local work? There are components missing from the Balanced Scorecard model that would better evaluate mission alignment within the corporate

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**Figure 8.** Adapting the Balanced Scorecard to Nonprofit Organizations (Kaplan, 2001)
nonprofit model. National nonprofits are transitioning to a logic model approach which can be better used to see real time results from specific directives.

**Public value scorecard.** Mark Moore (2003), addressed the Balanced Scorecard model to identify additional public sector gaps in evaluation. As an alternative to Kaplan’s nonprofit adaptation of the Balanced Scorecard Moore’s Public Value Scorecard was illustrated as a “strategic triangle” (Figure 9). The “public value” was defined as “the extent to which it achieves its mission, the benefits it delivers to clients, and the social outcomes it achieves” (Moore, 2003, p. 20). Calling nonprofit leadership to the Public Value Scorecard evaluates these three areas (instead of Kaplan’s four perspectives) for a greater commitment and advancement to an overall strategy within the organization.

![Figure 9. Strategic Triangle (Moore, 2003)](image)

Moore creates the foci of the triangle as: 1) The Public Value Circle, What is the ultimate value the organization seeks to produce? Moving to explicit language better defines goals and defends the work as important to the social change being pursued. 2) The Legitimacy and Support Circle, Who supports the mission and what resources are being invested into the organization for the work? Unlike “customers” or “investors” the supporters receive a social value instead of a private financial return. In the Legitimacy Circle the nonprofit organization must earn its
support from the stakeholders that are also pursuing the same public purpose. 3) The Operational Capacity Circle, Can the initiative achieve the desired goals? Moore is careful to highlight the difference between evaluating “operational” and not “organizational” capacity due to a distinct understanding of the sector. To achieve mass social change collaborations and partnerships will form. This does not minimize the operational capacity. This, instead, is meant to describe the conversion of inputs to outputs and thus to desired outcomes.

The three circles of the Public Value Scorecard become the focus for measurement of success. Defining standards that explicate the public value perspective, the legitimacy and support perspective and the operational capacity begin to align behaviors, external perspectives, and resources with the strategic vision.

**Multidimensional, integrated model of nonprofit organizational effectiveness.**

Multidimensional, Integrated Model of Nonprofit Organizational Effectiveness (MIMNOE) developed by Sowa, Selden, and Sandfort (2004) has been used to hone in on two key areas of nonprofit effectiveness: management effectiveness and program effectiveness, unpacked further to explore the capacity and outcomes within these two dimensions. This model extends the silo perspective of these two dimensions of effectiveness by recognizing and testing their relationship as it relates to outcomes of the organization. MIMNOE considers which variables to assess and how they interrelate to define and measure organizational effectiveness. This hierarchical model begins to understand the inner workings of a large corporate nonprofit organization. Evaluating the “management” as “characteristics that describe an organization and the actions of the managers within it… (i.e. structure and process)…. ” [and] “Program refers to the specific service or intervention provided by the organization….related to the capacity of the program” (p. 715).
Sowa, Selden, and Sandfort design four key principles that better explain the MIMNOE model.

Principle 1: There are multiple dimensions of effectiveness, primary are management and program. Designed to legitimize how well structures operate and the impact it has on the employees.

Principle 2: Management and Program effectiveness are further composed of sub dimensions, capacity and outcomes. Multiple indicators can be used to address this principle, however clearly defining expectations within this principle can better create direction and purpose.

Principle 3: Both objective and perceptual measures are needed to fully capture the dimensions of effectiveness. Social constructionists inform the literature with the “meanings” made by staff, management, and clients regarding the organizational operation. Perceptions help understand the function/dysfunction whereby impacting the effectiveness of the organization.

In this model the role of management structures include the mission, strategic plan, human resources, financial system, and information technology. The perceptual importance of these indicators can be measured through staff evaluation. Program structures are the method of delivery for the program, how it transforms inputs into outputs documenting program integrity (levels of resources provided to a program, financial and personnel). Staff perception of the efficacy of their programs is a critical element to the programmatic measurement and evaluation.

Principle 4: Organizational effectiveness should allow for organizational and programmatic variations within a systemic structure. Management models should transcend across the organization but there can be variations between programs structures.
Principle 5: The analytics used should capture multiple levels of interrelationships between dimensions of organizational effectiveness. Structural Equation Models and Hierarchical Linear Modeling begin to address the organization effectiveness relationships within the structure. However, these are unable to measure complex hierarchical models “especially those involving reciprocal causation” (p. 721).

Organizations are complex entities and quantitative measures do not capture the realities of the mission work. This gap in evaluation is evident and therefore additional methods are required to better gauge success within the corporate model nonprofit and the interconnectedness of headquarter and local offices. This research finds MIMNOE most valuable to assess accountability and to develop evaluations measures for the corporate model nonprofit. Principle 1 and 2 support the method in this research. Recognizing that internal success measures are relative to the individual organization that is being evaluated. The first step is to define and provide performance measures that indicate levels of alignment, prior to the evaluation process. Principle 4 supports the context of the national corporate model, in that each office needs implementation leeway, however systemic consistencies are critical to organizational effectiveness. Principles 3 and 5 are relevant to the theoretical models of resource dependency and reflexivity Theory that proves to be a strong framework for a new tool to offer alignment measures within corporate nonprofit structures. Chapter VI will discuss this MIMNOE principles as it relates to the specific NWTF case study and better articulate the research conclusions using the MIMNOE’s principles.

The balanced scorecard approach relies heavily on external evaluation (i.e. stakeholder perspectives and financial outlook perceptions). The question of internal alignment is better addressed through the MIMNOE framework. Its primary purpose is evaluation of effectiveness
whereby goal alignment between offices and clarity of expectations is not referenced. Therefore, this research extends MIMNOE principles to a corporate model nonprofit in an effort to create and evaluate shared understanding as a method of measure for mission accountability.

This research intends to demonstrate a need for an internal tool that better illuminates the value of shared understanding on mission work. Regional office capacities, strengths, and challenges compared to well-defined national expectations creates a seamless understanding of success. There is a relationship between the national mission and the narrower goals for development of expectations within short term outcome measurements (Moore, 2003).

This description only samples the evaluation tools and purpose national nonprofits employ. It is intended to suggest that national/local relationships are riddled with interpersonal dynamics, geographical strains, and a hierarchical model.

**Indicators of Alignment**

It is the responsibility of the organization leaders to identify the variables that are important to the success of the organization. This research does not claim to use every indicator that could be considered critical to the entire nonprofit sector. There is little research that describes such a comprehensive list of variables that have been proven to demonstrate mission alignment in the corporate model nonprofits. However, what can be deduced is a list of variables that have a vast breadth and depth of literature on their purpose and value. It can be assumed that the variable literature resonates with the overarching sector norms and each variable could have a place in the evaluation process. In this research the following variables are evaluated as alignment indicators: Fundraising, Mission Delivery, Volunteer/Community Engagement, HR/Operations, and PR/External Communication.
Fundraising. Fund development strategies run the gamut. The organization’s size, need, scope, etc. are integral to the fundraising plan. In the sector, organizations are now being highlighted for unique modes of revenue generation and many nonprofits are constantly looking for the “next big thing” in fundraising (Stiffman, 2016). Techniques like people matching to make “the ask” and training staff and volunteers to learn how to solicit finds are a priority for fundraising teams. Nonprofits are welcoming the development team to the strategic planning meetings more often in an effort to share the burden of revenue generation. This shift to an inclusive model of fundraising demonstrates the shared responsibility nonprofits are distributing to all staff. Developing the staff with the fundraising model in mind continues to create and respond to the “culture of philanthropy” demand (Gibson, 2016; Bell & Cornelius, 2013).

Economics literature posits the need for evidence in efficiency in fundraising. David Yi (2010) offered his article, *Determinants of Fundraising Efficiency of Nonprofit Organizations, in response*. His research posits “charities that allocate more resources on fundraising related labor...are more efficient in fundraising” (p.465). Policy literature also has a voice in the measuring and accountability of organization fundraising. Ratios of overhead compared to mission-related work in relation to total revenue have created a frenzy of transparency and accountability cries within and outside of the sector. Funding opportunities are driven by these accountability measures and there is still no concise, sector-wide approach to evaluating fundraising effectiveness (Brooks, 2004).

All this to say, fundraising in the nonprofit sector includes multiple giving avenues, a wide range of donors, and requires tools and resources to be effective and efficient in revenue generation.

For the purpose of this study fundraising will be characterized by:
1. The dollars generated through regional/local events,
2. Conservation grants,
3. Major/Planned gifts, and
4. Corporate agreements/Sponsorships

Mission delivery. Mission delivery is often referred to as program implementation or service provision in the literature. These ideas are interchangeable. Mission delivery is the core of each nonprofit organization. Mission statements create reason for work. Staff, governments, volunteers, and donors alike believe in the work of the nonprofits because of the mission statement (Bode, 2017; Dollery & Wallis, 2003; Hansman, 1986). How the mission statement is activated through mission delivery becomes most critical. Hence the idea of delivering on the mission. This can be done through programs, education, advocacy, as well as other avenues of mission advancement. For the sake of this research we characterize mission delivery as:

1. Development of programs that further the work of the organization,
2. Implementation of programs that further the work of the organization, and
3. Work that meets the mission goals of the organization’s strategic plan.

Mission delivery is often thwarted by the lack of resources from the organization (Hawley, Black, Hoefer, Barnett, 2017). Having a limited staff model or uninformed volunteers can create a gap in awareness and knowledge to provide the outreach mission delivery requires. Nonprofits are responsible for their own governance and in so doing become their own decision-maker for programmatic success. These individual organizations ensure mission delivery meets the demands (Bode, 2017). Mission delivery should seek to form around the strategic vision of the organization (Allison & Kaye, 1997). With the strategic vision in the forefront, the mission
guiding the decisions of the organization (e.g. programmatic planning or mission delivery) can be developed with outcomes in mind.

**Volunteer/community engagement.** Interacting with the public in the name of an organization is critical to nonprofits. Advocating for the mission, building a network of informed constituents, and creating passionate volunteers to do the work of the mission is a familiar model to many 501(c)3 organizations. The Bureau of Labor Statistics (2015) indicated that over 70% of the nation’s volunteers are associated with one organization and approximately 18% were connected to two organizations. The sector, as a whole, is heavily reliant on the work of the volunteer pool (Hager & Brudney, 2004; Netting, O’Connor, Thomas, & Yancey, 2005; Garner & Garner, 2011). Volunteer motivation and engagement become vital to developing this pool for the success of the organizations.

Since there is not a single set of characteristics that define the volunteer market it is a challenge to hone in on specific motivational tools that will resonate (Cnaan & Amrofell, 1994; Dwiggins-Beeler, Spitzberg, Roesch, 2011). Engaging the volunteer sector on an intrinsic level is more likely to motivate given the need for personal fulfillment (Ashcraft & Kedrowicz, 2002; Adams, Schlueter, & Barge, 1988). Therefore volunteer commitment seems to have a correlation with intrinsic motivation, whereby the relationship is reciprocal. Organizations succeed in volunteer participation when they understand and can develop meaningful experiences for the individual volunteer.

In this research volunteer/community engagement is characterized by:

1. The organization’s ability to connect with local constituents,
2. The organization’s ability to involve the community in the mission, and
3. The organization’s ability to engage the public in the work of the organization.
These characteristics are deliberately broad. Building community goodwill and motivating volunteers must happen at varying levels. Since there is no single direct path to building volunteers and organization commitment (Dwiggins-Beeler, Spitzberg, Roesch, 2011) each organization should develop strategies to connect, involve, and engage with the community for long-term volunteer support.

**HR/operations.** Typical human resource functions reside in recruitment, training, and performance evaluations (Borzaga & Tortia, 2006; Cunningham, 2010). HR and Operations move beyond standard HR practices and expand to account for employee’s role in mission outcomes; enhancing skills, participation in decisions, and employee motivation (Conway & Monks, 2008; Parry, Kelliher, Mille, & Tyson, 2005). The increased interest in the nonprofit sector and the decreased resources available has dramatically transitioned the expectations of the nonprofit professional and begin to create a more professionalized sector (Mesch, 2010). With this shift in mind, the HR requirements of the nonprofit sector revisit “increased formalization, higher compensation, and changes in how work is designed and accomplished” (p. S174).

For-profit HR literature continues to develop the understanding of the interconnectedness of HR policies, HR principles, and HR practices (Ridder, Piening, & Baluch, 2012) and the nonprofit sector continue to see similar relevance to the extensions of the HR study. Guo et al. (2011) states, larger nonprofits seem to have a vision for strategic HR practices and that “local affiliates of nonprofit organizations are more likely to implement strategic Human Resource Management (HRM) practices” (p. 248). Additionally, strategic HRM practices have been cited as essential to nonprofit organization’s performance (Guo et al., 2011; Condrey, 1998; Farazmand, 2004; Perry & Mesch, 1997). At best, it is understood that HR/Operations is a field of great importance to the sector, given the overarching priority of efficacy and efficiency.
demanded by the stakeholders. Keen HR practices advance the mission and direction of the organization, as they are the guiding policies that manage the agency efforts (Guo et al., 2011; Lynn, 2003; Pynes, 2004). For this purpose the HR/Operations indicator is best characterized by:

1. The policies and procedures in place for reporting and conduct,
2. Policies that are developed and maintained at the national office,
3. Policies that are executed in compliance with national’s requirements, and
4. Recruitment, retention, & training efforts.

These characteristics, for the sake of this corporate model nonprofit research, best highlight the current nonprofit HR literature and call to mind the importance of various tasks that mustn’t be overlooked.

**PR/ external communication.** Public relations (PR), understood at its core, is the ability to galvanize the public to support the mission of the organization through external messaging. Creating a basic story through well-positioned messaging that is retold creates credibility (Shankman, 2007). Public relations stems from the “buzz” created around meaningful message placement. *Public Relations News* better defines PR as the organization’s “management function which evaluates public attitudes, identifies the policies and procedures of an individual or an organization with the public interest, and plans and executes a program of action to earn public understanding and acceptance” (quoted in Cutlip, Center, & Broom, 2006, p. 4). This variable seeks to understand the publicity of the organization, how that is measured, and crafted from the organization (Lee, 2011).

For the sake of this research PR/external communications is characterized as:

1. The activities that create and promote the organizational language and
2. The shared language to promote the mission.

PR/external communications is deemed a vital part of the evaluation of the organization’s behaviors because “it urges information on people who do not seek it. An effort to induce them to give money or service to relieve suffering, to change personal habits, or to acknowledge and correct injustice must often be unwelcome… (Cutlip, Center, & Broom, 2006; Routzahn & Routzahn, 1928, p. iii). This variable recognizes the value of organizational messaging to a disengaged audience.

These five variables emerged from personal experiences with several major nonprofit organizations and are supported by the current fields of research in the nonprofit body of knowledge.

Given the current literature, there is a need for a process that can be used to create a dynamic look at each office compared to the expectations of the national office to serve the umbrella mission of the organization. “Performance derives from the behavior of people, and it is not possible to guarantee performance through the creation of structures… [Instead] the processes are the dynamic vehicles for bringing structures to life” (Renz, 2010, p. 144). Learning, innovation, and design are specific takeaways from a more complete inward-facing alignment tool that measures behaviors based on understanding and not the autocratic commands within the structure.

The structure of the organization provides hierarchy and leadership for these personnel mission behavior alignment specifications, used in the accountability evaluations. These structural rules and boundaries are needed throughout organization and to a system’s interconnectedness. This intra-organizational connectedness is grounded in resource dependency
theory. Power and resources within an organization can be understood through this theoretical discussion.

**Resource Dependency Theory**

Resource dependency theory (RDT) provides guidelines and environmental considerations to organizational leaders who use partnerships to offset organization resource needs. However they need to understand the relevant considerations and consequences of these relationships (Malatesta & Smith, 2014). Drawing on the work of Emerson (1962), Young (1998), Guo & Acar (2005), Lenaghan (2006), Mosley (2010), Seo (2011), and Sleet (2010) this research will extend the application of resource dependency theory beyond the traditional lens of inter-organizational power and interconnectedness and move the theory to an intra-organizational perspective. Recognizing the hierarchical relationship within the corporate national nonprofit model does not preclude the branch office and headquarter office from having a mutual need for one another’s skills and resources. The challenge is to maintain a balance between resource dependency and individual office purpose (community focus, national research mission, etc.; Guo & Acar, 2005).

Pfeffer and Salancik (1978) coined resource dependency theory in their attempt to better understand the relationship between organizations that rely on one another within environmental constraints. The idea that organizations have a seemingly mutually dependent relationship for resources is the founding principle of RDT. It has since become “one of the most influential theories in organizational and strategic management” (Hillman, Withers, & Collins, 2009, p. 1404). RDT appreciates the power, influence, resources, and trust variables to explicitly understand the relationships between parties. Knowledge and resources between partnering
organizations becomes the currency of choice to deepen the impact and outcomes of the dependent organizations (Drees & Heugens, 2013). Resource dependency is widely applied in nonprofit sector research. Typical application on RDT is understanding the interdependencies of external networks, this research suggests that the national/regional model does replicate a similar external interdependency that must not be overlooked.

**Extending to Intra-Organizational Model**

RDT is rooted in simple principles: 1) The organization needs resources to survive and pursue its goals. For this research the term “organization” can be extended to mean the separate levels within the corporate model of the national/local nonprofit. 2) The organization can obtain resources from its environment. Extended, it is understood that local relationships produce a local following and nationally the scope for resource procurement is greater. Both levels in the corporate model can obtain resources from their specific constituency. 3) Power and dependency matter in the organizational relationship. Emerson’s (1962) pinnacle work in power dependency theory continues to demonstrate that power and resource dependency are inversely related. This is critical as we extend the RDT theory to intra-organizational relationships. Using RDT we assume that the balance of power favors the organization that has what the other needs. “The procurement of external resources is an essential component to strategic and tactical management” (Powell & Rey, 2015) thereby, suggesting the entity that can secure these resources retains power. Recognizing both sides carry power for different campaigns and organizational needs, RDT reminds us that power balance can ebb and flow between entities. (Malatesta & Smith, 2014).

RDT literature appreciates collaborations. Corporate headquarter nonprofits and their local offices are not collaborations in the true sense. These relationships function as a system.
This assumes a system-wide recognition of inputs and outputs, which according to Pfeffer and Salancik (1978, 2003) is the underpinning of the organization’s ability to acquire resources. Even though the intra-organizational relationships of corporate model design are not “collaborations” as Pfeffer and Salancik originally proposed, there is a mutual understanding of dependency between the levels of the organization. Despite the fact that much of the immediate power lies at the headquarters. Based on design of the organization, local offices seek knowledge and resources from the national body. Similarly, national recognizes that locals can do “street-level” work that national simply cannot and this offers human capital by way for volunteer power, local funds, and local needs assessment knowledge to build the national brand and mission capacity. These intra-organizational relationships that exude trust and respect allow the nonprofit, at all levels, to be poised to respond to environmental shifts (Duderstadt & Womack, 2003). Legitimacy is a shared outcome for both the local and national office. Defined as “a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions” (Suchman, 1995, p. 547). The relationship between local and national can effectuate organizational legitimacy. External constituents may assume the work of one entity is true of the other and therefore their individual legitimacy might “rub off” on the other (Baum & Oliver, 1991; Bitektine, 2011; Pfeffer & Salancik, 1978). Resource dependency theory is a foundation that recognizes reciprocal or mutual dependency within the organization (Casciaro & Piskorski, 2005) and to better explain the vital role both players share in the mission work.

**Environment/Control**

The dichotomous relationship can be impacted by self-benefiting behaviors of either level of organization (Ketchen & Hult, 2007) whereby trust, respect, and mutual value/concern is
threatened on both sides. Fitting with the original findings of inter-organizations RDT is the idea that national nonprofits and their offices operate in uncertain environments and are working to ensure a smooth and predictable flow of knowledge and resources between the power sources (Mizruchi & Galaskiewicz, 1993). Resource possession, access, or decision-making power links to control and thus influence within the organization. RDT distinguishes that the environment has a power-centered role in resource dependency between organizations (Reitz, 1979). To understand the environment through the RDT lens there are three characteristics, according to Malatesta and Smith (2014). 1) Concentration, the degree to which power is dispersed between within the levels of the organization. RDT centers on the organization within the environmental context of resources available and distributed. Thus, intra-organizational environments can be used to highlight power distribution and that power can be used to incentivize within the organization (Mosley, 2010). 2) Munificence, the scarcity of resources within the environment. 3) Interconnectedness, the degree to which the levels of the corporate nonprofit are linked in the overall system. This symbiotic relationship increases the need for interdependence (Galaskiewicz & Bielefeld, 1998). Managing resource dependency is an important tenant of the theory. “Although organizations [are] constrained by their situations and environments, [they have’ opportunities to do things…to obtain, at least temporary autonomy and the ability to pursue organizational interests” (Pfeffer, 2003, p. xii).

Resource dependency theory is used in nonprofits to understand the collaborations, not to better evaluate effectiveness, efficiency or human behavior of the corporate model (Gou & Acar, 2005). No singular theory can explain the intra-organizational relationships. “New applications of RDT may be realized through the integration of RDT with complimentary theoretical
perspectives” (Hillman et al., 2009, p. 1418). An association of RDT with other models allows a unique emphasis within the intra-organizational design.

Therefore, the human perspective of reflexivity is applied to the already established organizational dynamic in a continued effort to explore how well local offices align to the expectations of the national office. The two models frame this research in two ways: resource dependency theory informs the relationship between these two entities at the organizational level whereas reflexivity theory seeks to better understand the individuals within the office and their behaviors.

**Reflexivity Theory**

Bringing new light to the resource dependency theory through the integration of reflexivity theory continues to deepen the relationship between the national and local nonprofit model. A central understanding of reflexivity theory is defined by “personal existence and is the basis on which people form social units” (Holland, 1999). Reflexivity is framed within a human context of our ability to think about our thinking (Weick, 1999), to be self-aware of our thoughts and behaviors, and to recognize our limitations. Much to Herbert Simon’s liking, as expressed through his theory of bounded rationality (1976) in the Public Administration field of study, Holland too presents the human limitations of what we know in relation to decisions made. Simon calls attention to the process of design whereby we can change current situations in to a more preferred one. To do this, however, the practitioner must believe in bridging the gap between professional knowledge and practice and ultimately allow themselves to be reflexive enough to create the recognized change in design and process (Schön, 1983). Furthermore, “all learning depends on the reflexive interpretations of one’s experience together with the
experience of others” (Lafitte, 1957, p. 17). Methods that consider the person’s frame of reference as an influence to the study are reflexive in nature.

Reflexivity, a study found in anthropology and political theory but developed from the lens of sociology and psychology, creates a clear understanding that asks the investigator to recognize their preconceived ideas and distortions. Most notably reflexivity is spoken of through a research lens. Phil Johnson and Joanne Duberley (2003) began to extend the foundational ideals of reflexive practice into the study of management. However, here too the primary lens is research. This study intends to analyze the intra-organizational dynamics of the national/local nonprofit model considering many of the same foundations that researchers call on in the practice of reflexivity. The hierarchy of organization can benefit from recognizing bias and embracing the skill of becoming “conscious of the ideology, culture, and politics” (Hertz, 1997, p. vii) of our audience with multiple layers, truths and voices (Hertz, 1996). Reflexive analysis requires the illumination of underlying assumptions. Holland (1999) says that increased knowledge of one’s self will extend the initial limits of these bias.

Reflexivity is constant and on-going. Within the organization, construct can be deconstructed (Cooper, 1990; Linstead & Grafton-Small, 1992). Reflexivity is not a one-time model but is instead continuously shaped by culture, domains, relationships, and interdisciplinary study of behavior and thought. The four reflexivity paradigms (Burrell and Morgan, 1972) are functionalism, interpretive, radical humanist, and radical structuralist. These paradigms, where reflexivity is seen in different capacities, are demonstrated in the realm of change versus regulation. The four paradigms of reflexive behavior illustrate the value of subjective/objective behavior compared with change versus regulation. This is introduced in this literature review because of the importance of understanding human behavior in a local office where constituent’s
needs and demands may differ from what policy or regulation support. Therefore, national expectations may not be met by the reflexive practitioner at the local level office.

This research acknowledges the organizational design, roles and responsibilities, and mutually dependent entities vying for the same mission success through multiple ways of work. Reflexive practices mean these practitioners must “surface and question their intuitive understandings…and engage in reflective conversations with their situation” (Schön, 1983, p. 265). Reflexivity allows the individuals inside the corporate model nonprofit to think about their assumptions, purpose, the competing priorities, and personal connection to ways of behavior.

**Reflexivity in Public Administration**

W. Edwards Deming coined a continuous feedback model that much of our public administration decision-making activities are still founded on. A Plan/Do/Check/Act template that calls for practitioners to be aware of systemic processes and citizen satisfaction (Holzer & Schwester, 2011). This is reflexive by nature. Reflexivity in the realm of public administration is the continuous and self-organizing improvement of regulatory practice whereby governance models contribute to forming, shaping, and guiding relations within the organization and between internal stakeholders (Veldman & Willmott, 2015).

Reflexivity in public administration recognizes and advances the processes of “collective learning” intra-organizationally (Scott, 2008). It is institutionalized when the processes of continuous review and improvement are practiced through ongoing intentional dialogue where no party has advantaged access to the right solution; creating more critical, responsible, and ethical action (De Schutter and Deakin, 2003; Veldman & Willmott, 2015; Cunliffe & Jun, 2005). To be implementers of policy, public administrator’s reflexivity allows the implementer to “turn back on our self the lens through which we are interpreting the world” (Goodall, 2000, p.
Thus, creating norms of discretion and implementation that administrators can seek to understand and empathize with.

**Local Office Discretion**

A copious amount of work has been done to understand the role of the Street-Level Bureaucrat (Lipsky, 1980) and their relationship to the political leaders. Mostly, in regards to the policy directives and the accepted actions of those Street-Level Bureaucrats (SLB) on the frontlines of implementation. This relationship can extend to an understanding of the structure between national and local offices of a nonprofit. The SLB discretion and policy divergence can be parallel to the local office discretion of an organizational mission implemented to best fit the local community. The controls of the SLB and the discretion influencers have been deeply studied to help inform this relationship (Keiser and Soss, 1998; Langbein, 2000; Hill, 2006; Ewalt & Jennings, 2004; Riccucci et al., 2004; Winter, 2003; Brehm and Gates, 1997; Brewer, 2005; Riccucci, 2005). However, alignment to the national mission - as measured by local branch offices’ knowledge and behaviors around key independent variables - within the corporate model nonprofit are yet to be deeply understood.

What is more understood in the context of SLB implementation studies is “that the translation of higher goals into street-level actions is subject to a variety of disjunctive influences” (May & Winter, 2007, p. 454). May and Winter (2007) continue by acknowledging four set of influencers on SLB behaviors: 1. Signals received from superiors about the importance/urgency of the policy. The words used create the policy intention or goal. 2. The organizational machinery, which details the organizational, managerial, and administrative imperatives. These dictate what happens at the service-delivery level. 3. The knowledge and attitudes of the SLB regarding the policy need, client, and the current condition. 4. External
factors that create additional pressures on the SLB, like workloads and client mix. These four conditions that influence Street-Level Bureaucrats can also be seen as influencers in the nonprofit context.

A responsive bureaucrat first has the ability to listen. Listening as deliberate behavior “can join self and society, theory and action, in reflexive relationship” (Stivers, 1994, p. 366). This constructive behavior limits the reactive responsiveness and strengthens the understanding of multiple perspectives. Demanding a reflexive public administrator ensures the understanding of their role and can equally recognize gaps in policy and practice that negatively affect marginalized populations (Cunliffe & Jun, 2005). Reflexivity in public administrators, at its foundation, is steeped in the ability to listen. Arguably “democracy is paying attention” (Bellah, et al., 1991). Listening, responding, and learning, is paying attention and thus reflexivity is a critical tenet of public administration.

**Reflexivity in the Corporate Model Nonprofit Domain**

National nonprofits with corporate models for local branch presence are framed much like that of the traditional bureaucracy. Schön, (1983) adds to the literature with his understanding of reflexivity inside a highly structured and programmed hierarchy. A reflexive practitioner strives to “think on their feet” and may begin to question organizational knowledge in which his job duties reside. Systems designed for efficiency may offend the reflective practitioner because it does not allow for space to examine the real needs of the environment. Constraints on the reflexive worker tend to cause pain in perception of job worth, value, and mission-centric behaviors. The work of the nonprofit sector thrives in the system where scientific explanation is no longer on a pedestal and objectivity was ideal, instead there is a realistic understanding of individual perceptions and self (Therborn, 2000; Hammersley, 1999).
Reflexivity creates push-back to autocratic management prerogatives and the traditional options to remedy new problems in organizational practice (Johnson & Duberley, 2003). National governing bodies need passionate people to convey the mission, raise funds, garner volunteer hours, and work the mission at the ground-level. Reflexivity helps administrators “engage in reciprocal communications with stakeholders and remain open to emerging perspectives” (Stivers, 1994, p. 367). Margret Harris (2001) finds value in reflexivity as an exploration of self in the nonprofit sector. Citing that there is a reflexive nature of knowledge construction and a new openness to consciousness in the political and practical application that will advance innovation and systemic change within the nonprofit (Grundy, 1987). If personal reflexivity is devalued there becomes a deficit in motivation and worth of the individual at the local level.

National nonprofits seek to invoke systemic revolutions and bring about new processes as a catalyst for change (Crutchfield & McLeod Grant, 2007). Through the transformation of knowledge the headquarter office needs and demands, from their local branches, a “reflexive realism” (Beck, 1996, p. 7) unites reality and social construct within the frame of productive and mission-centric behavior. A reflexive practitioner would recognize their own thoughts and experiences that 1) direct their current behavior toward an understanding of the national purpose and local needs and 2) reflect on how their past experiences maybe providing a bias (positive or negative) toward their decision-making process and intra-organizational relationships.

The analysis that follows builds on the understanding of reflexivity theory. Schön, (1983, 1987) posits, reflecting critically and actively engaging in organizational issues is an obligation of the leadership. “The capacity for socially responsive…critical, ethical judgement should be…. One of the capacities of a “professional” as a “reflexive practitioner” (Jeavons, 2010).
We encourage reflexivity through reflection, open dialogue, diversity of decision-making bodies, or the inclusion of a “devil’s advocate”. These tools create a cultural norm where leaders are reminded to see multiple perspectives and acknowledge their self-inside the process.

Reflexivity encourages each person inside the corporate nonprofit model to consider personal bias to see the opportunities as well as the risks in individual and organizational behaviors.

**Summary of Theoretical Approaches**

Resource dependency theory has been used in the preceding literature to describe inter-organizational relationships as well as a power/autonomy balance-seeking norm. This research extends the Resource Dependency Theory model to intra-organizational relationships. Examining the existence of a power balance within the nonprofit corporate model and acknowledging the critical role interdependence has between both the headquarters and the local branch office.

Pairing resource dependency theory with reflexivity theory demonstrates an understanding of headquarter/regional relationship that is intra-organizational but also contains a strong human behavior element. Foucault’s *The Archeology of Knowledge* (1972) inadvertently connects the value of power, which can be seen as resource dependency, with that of critical reflexivity as it pertains to constructing intra-organizational norms of practice and the influence on knowledge. Understanding the resource dependency theory model with a constant reflexive theoretical bent is crucial to the organizational development and growth of the human capital within the organization. “If organization members can better understand how they construct themselves and their organization, they will be better able to address their problems” (Barry, 1997, p. 31). This research braces resource dependency theory with reflexivity in search of a
theoretical framework that begins to address the resource interdependence and human motivation within the corporate model nonprofit organization.

**Summary of the Literature Review**

The review offered an overview of literature in four main areas to support the research, presented in Chapter III, IV, V, and VI. The literature began with an understanding of nonprofit organizational design options. In this literature definitions of varying models were provided. Herein it was noted that the model designs can be confusing in practice and offer some overlap in design, particularly as the organizations grow or change.

The second section of literature focused on the understanding of shared commitment and shared understanding, within an organization. The purpose of this section was meant to highlight the differences between these two concepts and allow the reader to think critically about how organization’s shared understanding is created and communicated.

The third area was in accountability literature. This was particularly important in the sub-areas of expectations and evaluation tools. Within this literature it is noted that most accountability tools are designed to be outward facing so that external stakeholders can determine the performance of the organization as a whole. The MIMNOE principles offered steps individual organizations can use to create evaluation tools that may be more inward facing to communicate and align local staff behaviors with national leader expectations.

The final section of literature that was presented was theoretical in nature. A better understanding of resource dependency theory and reflexivity theory were introduced. These theories are used throughout the research to offer a deeper understanding of corporate nonprofit model behaviors, intricacies, and needs to create mission-centric measurements.
In sum, this review demonstrates the limited understanding of corporate model nonprofits, specific as well as the importance of creating and communicating mission-critical behaviors within that model of organization. This review sheds light on multiple tenets of mission-centric behavior and alignment within corporate national nonprofits. Contemporary ideas of accountability, structure, local needs, as well as umbrella missions that guide purpose within the structure demonstrates evidence for the practical problem this research addresses.

In the forthcoming chapters we extend the previous understanding of organizational structure/design, expectations and evaluations for accountability, and resource dependency theory with an overarching conceptualization of how to encourage and use a reflexive model in the corporate national nonprofit.
CHAPTER III

METHODOLOGY

The literature review, presented in Chapter II, offers an extensive overview of the previous knowledge that is used to develop this research; organizational structure, shared understanding vs. shared commitment, accountability measures, expectations, evaluation tools, and the theoretical models create a framework for the research. Through the literature review it is clear that the comprehensive measurement and performance evaluation tools being used focus primarily on external perspectives of the organizations. Vantage points such as client, financial, and stakeholder views (i.e. Balanced Scorecard approach) are employed.

This study addresses the current gap in the literature by recognizing the need for internal assessment. Such assessment begins with a clear description of expectations and a shared understanding of critical characteristics that are used in measurement of organizational alignment behaviors. Ultimately, this research seeks to offer a better understanding of the cause and implications of intra-organizational alignment, or lack thereof. The national expectations are used to compare the perceptions and understanding of the regional offices to the national offices of a corporate (or semi-federated) model nonprofit organization.

Therefore, this research was designed to study the internal stakeholder’s perceptions, national directives, and alignment of mission-centric behavior across the offices within one organization. Based on the intent of the research, a comprehensive instrumental case study (Stake, 1995) is employed to focus on the issue of mission alignment between the headquarter leadership and field staff. A mixed methods approach will be used in the case study. There are seventeen (17) working- hypotheses developed to provide support or rebuttal to the overarching
research questions. These hypotheses are intended to understand alignment behavior between the national organization and the regional/local offices. The National Wild Turkey Federation identified the five key variables: fundraising, mission delivery, PR/communication, HR/operations, and volunteer/community engagement that are used to test the shared understanding of mission alignment behavior. This research design sets out to comprehend the national nonprofit organizational expectations in order to promote a strengthened effort toward mission alignment through purposeful behaviors at all levels of the organization.

This three-phase research design is distinctly created to analyze individual perceptions of mission alignment across the organization as well as review the data from an organizational design lens. Whereby, we can recognize the cause and effects of alignment activity by demonstrating the value of a shared understanding throughout levels of the organization’s hierarchy. To do this the, Phase 1 of the research conducted face-to-face interviews with the five members of the Senior Executive team as well as the CEO of the organization. The interview guide (See Appendix C) was developed to begin the dialogue of what organizational and region-specific success is in each of the five variables. Five senior executives and one chief executive officer were invited to these private face-to-face interviews, at the headquarters office in Edgefield, SC. All five senior executives were available for face-to-face interviews and, due to scheduling conflicts, the CEO was able to conduct the interview over the phone. In Table 2 roles, tenure, and primary oversight are illustrated.

Phase 2 of the research were (primarily) email response interviews. A Phase 2 interview guide (See Appendix D) was distributed to a sampling of the senior executive team’s direct reports. The purpose of this focused group was to begin to determine behavior patterns and expectations between senior management and their direct reports.
Table 2

*Senior management team, roles/responsibilities, and tenure*

<table>
<thead>
<tr>
<th>Title</th>
<th>Tenure</th>
<th>Primary Alignment Variable Oversight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Executive Officer</td>
<td>8 yrs</td>
<td>Complete Organizational Oversight</td>
</tr>
<tr>
<td>Chief Conservation Officer</td>
<td>3 yrs</td>
<td>Conservation Delivery &amp; Hunting Heritage Programs</td>
</tr>
<tr>
<td>Chief Financial Officer</td>
<td>7 yrs</td>
<td>Human Resources, Operations, &amp; Finance</td>
</tr>
<tr>
<td>VP of Communications</td>
<td>17 yrs</td>
<td>Public Relations, Media, &amp; Communications</td>
</tr>
<tr>
<td>Executive VP of Marketing &amp; Development</td>
<td>5 yrs</td>
<td>Marketing, Corporate Agreements, &amp; Major Gifts</td>
</tr>
<tr>
<td>Senior VP of Fund Development &amp; Volunteer Relations</td>
<td>4 yrs</td>
<td>Regional Staff Oversight, Fundraising, and Volunteer Management Strategies</td>
</tr>
</tbody>
</table>

The interview questions were framed similarly to the senior management questions using the five variables and a continuous recognition of resource dependency and reflectivity theories to gather and process meaningful data. These data were used to compare and contrast understandings of direct report staff to the expectations of their senior executive team. Seeking to understand if there is there a breakdown in shared understanding of mission alignment behaviors, outcomes, and measures at the first level of the information dissemination. Thirteen direct reports were sent email questionnaires and 11 responded (Table 3). Two were face-to-face interviews, 1 was a phone interview and 8 responded via email questionnaire.

After Phase 1 and 2 were complete those responses were used to craft Phase 3 survey questions. This all-staff web-based survey was created using QuestionPro software. The questions were primarily Likert Scale questions (33/43) and also included open-ended and multiple choice (Appendix E).
Table 3

Manager title, direct report title, roles/responsibilities, and tenure

<table>
<thead>
<tr>
<th>Title</th>
<th>Tenure</th>
<th>Primary Role</th>
<th>Direct Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Controller</td>
<td>3.5 yrs</td>
<td>Mgmt. of Accounting, Membership, Banquet Receivables, &amp;CSR</td>
<td>CFO</td>
</tr>
<tr>
<td>HR Generalist</td>
<td>1.5 yrs</td>
<td>Recruiting, Staffing, Safety, Compensations, &amp; Training</td>
<td>CFO</td>
</tr>
<tr>
<td>Customer Service Manager</td>
<td>6 yrs</td>
<td>Sales &amp; CSR</td>
<td>CFO</td>
</tr>
<tr>
<td>Director of Conservation</td>
<td>11.5 yrs</td>
<td>Regional Biologist Supervisor</td>
<td>CCO</td>
</tr>
<tr>
<td>Director of Conservation</td>
<td>2 yrs</td>
<td>Regional Biologist Supervisor</td>
<td>CCO</td>
</tr>
<tr>
<td>Director of Lands &amp; Policy</td>
<td>17 yrs</td>
<td>Policy and Conservation Leadership</td>
<td>CCO</td>
</tr>
<tr>
<td>AVP of Science &amp; Technology</td>
<td>15 yrs</td>
<td>GIS, Research, &amp; Grants</td>
<td>CCO</td>
</tr>
<tr>
<td>Director of Field Operations</td>
<td>8 yrs</td>
<td>Team Leader/Supervisor</td>
<td>SVP of Fund Development &amp; Vol Relations</td>
</tr>
<tr>
<td>Director of Field Operations</td>
<td>4 yrs</td>
<td>Team Leader/Supervisor</td>
<td>SVP of Fund Development &amp; Vol Relations</td>
</tr>
<tr>
<td>Editor</td>
<td>18 yrs</td>
<td>Magazine Editor &amp; Photo Director</td>
<td>VP of Communications</td>
</tr>
<tr>
<td>Public Relations</td>
<td>2 yrs</td>
<td>Media, web, and branding</td>
<td>VP of Communications</td>
</tr>
</tbody>
</table>

Phase 3 questions were designed to illustrate staff’s individual perceptions of shared understanding of the five indicator variables to determine mission alignment behaviors, outcomes, and measurements. Phase 3 of the data collection targeted all staff and asked each to answer the same set of questions. This phase was important to: 1) Evaluate across the organization for consistencies, themes, trends, etc. 2) Use organizational-specific knowledge to communicate with a shared vocabulary. 3) The organizational framework; the first two phases were designed to inform the Phase 3 survey design. These data collection opportunities gathered the most relevant data to the evaluation of the five alignment indicators within the NWTF.
Prior to Phase 2 the CEO sent out a message indicating the organizational commitment to the research (Appendix F) and prior to the distribution of the survey, in Phase 3, the CEO provided a welcome message to all staff introducing the research project, purpose, and organizational commitment to the research (Appendix G). The intention of the CEO’s initial message to staff was to create a “safe” environment where employees are encouraged to participate and allowed to share their insights for this research. The survey was distributed to all 259 staff members across the country. A ten-day window was allowed for survey completion and 193 completed the survey which was a 75% response rate.

**Research Question and Hypotheses**

Seventeen working hypotheses were determined to guide the research. These are used to understand the relationship between alignment and the shared understanding of the five variables: Fundraising, mission deliverables, volunteer structures/community engagement, human resources/operations, and public relations/external communication. Each hypothesis is rooted in either reflexivity theory and/or resource dependency theory. Through the three phases of research the presence or lack of a shared understanding of behaviors, outcomes, and measurements within the variables is demonstrated. Each dependent variable, listed below, includes a set of hypotheses and the theory for which it can continue to be understood.

**Primary Research Question**

To what extent does regional/local office knowledge and behavior align with the expectations and mission of the national headquarter nonprofit?
Fundraising Expectations

(REFLEX) H₀: National offices recognize the varying needs for communication effectiveness and how that communication impacts regional understanding of purpose and direction to better align with fundraising goals.

(REFLEX) H₀: Regional offices’ understanding of fundraising models and expectations allow greater reflexivity in creating fundraising opportunities that align with national expectations and goals.

(RES DEP) H₀: The purposes of the regional and national offices are clearly understood to rely on both offices to raise funds through mission-centric donor involvement.

Mission Delivery

(REFLEX) H₀: Regional offices’ understand the expectations of mission delivery designed by the national office and are able to develop structures that fit the needs of the individual communities for effective mission delivery.

(RES DEP) H₀: National office uses varying methods of communication to express clearly defined mission delivery expectations for the regional offices in order to promote the mission of the organization.

(RES DEP/REFLEX) H₀: Regional offices’ understanding of mission delivery models and expectations allow for greater reflexivity in creating opportunities that align with national expectations and goals.

Volunteer/Community Engagement

(RES DEP/REFLEX) H₀: National office creates volunteer policy that fits the design of each office, given their community conditions.
(REFLEX) \(H_0\): Regional offices’ understand the expectations of volunteer engagement designed by the national office and are able to develop structures that fit the needs of the community for effective volunteer models.

(RES DEP/REFLEX) \(H_0\): Regional offices’ understanding of volunteer engagement models and expectations allow for greater reflexivity in creating opportunities that align with national expectations and goals.

**HR/Operations**

(REFLEX) \(H_0\): Regional offices’ understand the expectations of operations and human resource practices designed by the national office and are able to develop structures that fit the needs of the community.

(RES DEP) \(H_0\): National office provides training to field staff for appropriate operational capacity so that the regional office is aligned with the national operational expectations.

(RES DEP/REFLEX) \(H_0\): National office creates operational policy that recognizes the design of each regional office, given their community conditions.

**PR/External Communication**

(REFLEX) \(H_0\): National office’s recognition of varying needs for communication effectiveness impacts regional offices’ understanding of purpose and direction to better align with communication goals.

(REFLEX) \(H_0\): Regional offices’ understanding of public relations models and expectations allow greater reflexivity in creating mission-based messaging opportunities that align with national expectations and goals.

(RES DEP) \(H_0\): The purposes of the regional and national offices are clearly understood to rely on both offices to develop and increase awareness through mission-centric communication.
Regional offices follow the communication message of the national office by disseminating the mission-centric message via local media relations. National office consults regional teams for perspective on media communications that are most appropriate for the individual need.

Throughout the phases of data collection these hypotheses are addressed. Resource dependency theory as well as reflexivity theory are employed to understand the implications of alignment behaviors and expectations. Highlighted throughout Chapter IV and V, the research illustrates context for each theoretical concept supported by the qualitative responses within the organization.

Design

The mixed method research approach is meant to demonstrate a shared understanding (or lack thereof) of mission alignment behaviors, measurements, and outcomes within all levels of the organization thus leading to a comprehensive case study. The qualitative design is a means to interpret experiences, information, and perceptions (Mason, 2002). In order to evaluate the hypotheses, data were assembled through qualitative interviews and quantitative survey methodologies. In addition, concurrent and transformative research strategies were employed to create a comprehensive understanding of key variables within the organization (Creswell, 2009). The expected result is data that can be assessed to recognize if there is mission alignment through a shared understanding of the selected alignment indicators.

The concurrent research strategy includes qualitative interviews, which helped inform the survey design and aided in understanding the results. This triangulation of data is critical for the researcher to best appreciate the infrastructure/model of the organization. Therefore, using the
concurrent mixed methods approach qualitative data will be collected through two phases of interviews, then quantitative data through an all staff electronic survey. This research initiated inferences regarding independent variable behaviors that are common or dissimilar across the country within the organization.

Three primary data sources are used in the analyses to follow. These data are collected over 3 months and are presented in a three part process.

1. Senior Executive Team Interviews- Face-to-face interviews were conducted with all senior executives who are responsible for leadership within the five variables. These data will better understand national leader’s expectations, tracking, and evaluation measurements of the five variables.

2. Regional Leader and Direct Report Questionnaire- Email, phone, and face-to-face interviews were conducted from a sampling of senior executive’s individual direct-report teams, across the country. These data inform the researcher on clarity of messaging, perceived understanding of national directives, and training and evaluation tools/perceptions.

3. All Staff Electronic Survey- All staff received a web-based survey of 43 questions. Survey questions were developed after Phase 1 and Phase 2 responses were reviewed. The first two phases informed the survey design for Phase 3.

Secondary data concerning organizational structure, employment conditions, demographics, and geographic variables are employed to provide contextual information for added controls.

“Pragmatists agree that research always occurs in social, historical, political, and other contexts. In this way, mixed methods studies may include a postmodern turn, a theoretical lens that is reflective…” (Creswell, 2009, p. 11). There are challenges to using such a mixed
methods approach. The design consists of multiple open-ended questions to best facilitate a deeper learning of alignment behavior, based on contributing and inhibiting variables. Ultimately, the professional and field significance of this study is to inform the expectations and relationship with the national and local offices.

This case study explored the five variables as indicators of alignment measures. The organizational inquiry is bound by the five categories as the variables or indicators for analysis. Data was collected, through three phases, over a period of 8 weeks. The unit of analysis were the individual employees and their behaviors, outcomes, and metrics. These indicated a shared understanding of the mission alignment indicator expectations and performance. Therefore, the extent of regional/national alignment was determined by individual’s behaviors based on a shared understanding of an indicator. Within that frame, it is possible for behaviors to align with expectations in some (but not all), all, or none of the variables.

This case study relied heavily on qualitative data through Phase 1 and Phase 2. However, Phase 3 employed some quantitative analysis by way of survey responses. This was used to provide a numeric representation of the trends and perceptions within the five variables. Specifically, survey questions related to behaviors, opinions/attitudes, values, and outcomes were seen as vital to continue to understand the causes and effects of intra-organizational alignment. Survey results were used in conjunction with interviews for data analysis and mixed methods research design.

**Organization Selection**

Multiple characteristics were considered during the organization selection process and many national nonprofits were vetted for consideration. Baseline criteria included the type of organization, the structure of the organization, design/process of fund disbursement and fiduciary
responsibility, and commitment to the research. Figure 10 illustrates the process of organization selection.

**Figure 10. Baseline Criteria for Organization Case Study**

For the scope of this research it is important to note that there is not an existing list of nonprofits categorized by “organizational structure” to serve as a sample frame. Instead, the selection process was determined by the current relationships and knowledge of the sector to connect with national nonprofits and thus determine if they fit the corporate model and if they were willing to serve as a “test case.” Multiple organizations were considered and the third organization that was vetted at the board and senior leadership level agreed to the extent of analysis required. Thus the process was convenience sampling.

The National Wild Turkey Federation provided not only the organizational design requirements but the desire for internal improvement using these research findings. The CEO and executive leadership team drafted a letter of understanding for the research (Appendix H) and Final Human Subject Institutional Review Board approval was granted (Appendix I).

National Wild Turkey Federation (NWTF), is a national nonprofit identified as a corporate model organization. The organization is dedicated to the conservation of the wild
turkey and the preservation of our hunting heritage. Founded in 1973 the NWTF works to enhance turkey populations as well as the continuation of hunting and quality wildlife habitat for numerous species. NWTF prides itself on a collaborative model of staff and volunteers to raise the awareness and dollars that fund their conservation work. The website (www.nwtf.org) boasts, 91 cents on each dollar raised goes to mission delivery. Using their deep nationwide staff/volunteer model, over $488 million dollars have been raised and spent toward mission delivery since 1985.

Mission delivery spending is recognized through the national dollars allocated for programs and also at the state level. For example, states are granted a “Super Fund” to use for local mission-critical work. These dollars are 20% of the net revenue raised by the individual state. Super Fund allocations are volunteer-directed but ultimately staff approved and the allocation of the Super Fund is at the direction of the national office.

Infrastructure data were amassed from May to August 2016 and represent the staff and volunteer stakeholder numbers at the time. The organization employs approximately 259 staff, of which 135 are based in the headquarters office in Edgefield, SC. There are approximately 220,000 “members” of the organization across the country that work to serve the almost 1800 chapters, nation-wide. “Membership” at the NWTF is not to be confused with the association structure nonprofits that require dues for membership. The NWTF uses “membership” to describe the minimum $35.00 gift that allows each donor some organizational features and benefits. (It is important not to confuse the use of the word membership to imply the organization is structured like an Association or member-serving organization. These are often indicated by a 501(c) 4 tax exempt status, instead of the required 501(c) 3 status for this research.) Approximately 22-25,000 of the 220,000 members are considered volunteers. There
are no specific criteria that the organization uses to qualify a volunteer over a member. But participation in committees and event logistics as well as mission delivery outreach opportunities are demonstrations of members that go above and beyond for their chapter and the organization. These behaviors tend to elevate a member to the unofficial “volunteer” title.

**NWTF as a Corporate Model**

The organizations name and bylaws indicate the model was a federation however, given extensive dialogue with all members of senior staff and the CEO, and with consult to the literature, there is a hybrid model forming. The NWTF’s infrastructure, using the descriptions presented in Chapter II the Literature Review, have remaining components that are a federated model however, using the same literature NWTF is predominately a corporate model. Field staff are the construction of the principal’s office and are subject to headquarters’ direct control (Young, 1989). They have a single tax exempt status and one national governing board. Specific criterion were presented to senior leadership (without identifying the name of the model the description was linked to) to determine how the organization is structured now and where the power is placed. Sills (1957) indicated that corporate models use programs that are standardized. The specifics of implementation may differ between chapters but not in content. The boundaries of the organization are established by headquarters and followed, with local variations, as needed. All local organizations are subject to the same rules and regulations, and are in direct contact with national headquarters through one of its employees, in the case of NWTF that connection is the Regional Director and Regional Biologist.

Ultimately, while there are state-guided decisions and Super Fund allocations none of those decentralized behaviors are purely federated. They are seen as corporate due to the national oversight and decision-making authority.
Sample

NWTF serves the country with 48 state offices. The national office is the centralized authority and all directives come from them. Local chapters do not have governing boards although various groups and committee structures advise the organization. In this research these local volunteer groups do not undermine the corporate model because they do not threaten the power hierarchy we are evaluating in a corporate model nonprofit.

Each chapter must proceed through a process of affiliation and acceptance by the national board. The Chapter elects up to four officers at each local level. This chapter volunteer group is made up of a president, banquet chair, secretary, and treasurer. There are typically 8-15 volunteers on each chapter advisory group. These officers have a responsibilities, per the Chapter Manual as decided by the NWTF national office (Appendix J). These Chapter advisory groups focus on the implementation of fundraising events and the logistics of mission delivery programs.

A state-wide level of representation is utilized through a State Board of Directors. This is typically a 12-18 member advisory group that consists of chapter representatives throughout the state. This advisory group’s primary responsibility is the management and distribution of the state’s superfund. It is a volunteer-directed process. The regional staff are required to provide oversight and approval on all allocations of Super Fund dollars.

The target population was staff within the national office (titles vary) whose responsibility it is to create strategies, models, goals, and communication efforts for the mission of the organization encompassing the five alignment categories of mission behavior and the staff responsible for the training of the field staff to perform the directives to demonstrate mission-alignment. Additionally, the sample includes the regional staff (titles vary) that are responsible
for the design, implementation, and local execution of national directives in fundraising, mission
delivery, volunteer/community engagement, HR/operations, and PR/external communication.

Initial interviews were conducted to assemble a preliminary understanding of the
organization, intra-organizational relationships, and current means of evaluation and success
measures for the regional offices. Surveys were distributed to (all) 259 staff from this
distribution 193 completed the survey. 257 started the survey and it was viewed 376 times.
There was a 75% completion rate. From this survey group the study seeks to understand:

1. National/Regional communication effectiveness regarding the 5 categories of
   alignment measure.
2. Regional understanding of national expectations regarding the 5 categories of
   alignment measure.
3. Regional success of alignment, deemed by the national office, regarding the 5
categories of alignment measure.

**Data Collection Protocols and Procedures**

The research includes a three phase process of data collection, over a three month span.
This was used to define and study the organization within the criteria and variables established.
The initial organization selection was completed in March, 2016. The organization’s senior
leadership team conducted an in depth review of the research proposal and conducted multiple
conversations between the researcher and organization. In addition, varying levels of staff were
consulted prior to the outset of the research to determine organizational capacity and interest in
the research.

The literature, discussed in Chapter II, was used to frame the indicators of alignment. During the initial organization selection the NWTF concurred- fundraising, mission delivery,
volunteer/community engagement, HR/operations, and PR/communications were a comprehensive list of indicators that would best identify mission alignment. For the sake of this research and relative to the context of the NWTF, the variables are understood to have particular meanings. Each is steeped in the context of practical understanding and current literature to support. Therefore, creating a shared understanding of the variable definition was the first part to developing alignment expectations within each variable and determining success (Table 4).

The attitudes and behaviors in the given variables are designed to better illustrate if there is a shared understanding of expectations within the five mission alignment variables identified by the organization.

**Phase 1.** The initial data collection began at the top of the organizational structure. The five executive leaders and the chief executive officer were the focus of Phase 1. These six positions are defined as the senior executive team for the organization, they oversee all the internal processes and expectations of the organization, and all report directly to the chief executive officer (Figure 11). The CEO reports to the board of directors, who are volunteer board members and for the purpose of this research were not included in the data collection. This research is specifically focused on paid staff relations and understanding of expectations within the staff hierarchy.

*Figure 11. NWTF Senior Executive Hierarchy and Titles*
Table 4

**Variable definition and oversight role**

<table>
<thead>
<tr>
<th>Variable</th>
<th>Definition/Characteristics</th>
<th>Primary Oversight</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fundraising</strong></td>
<td></td>
<td>Multiple Leaders</td>
</tr>
<tr>
<td>(Gibson, 2016; Bell &amp;</td>
<td>• Dollars generated through regional/local events</td>
<td></td>
</tr>
<tr>
<td>Cornelius, 2013; Yi, 2010;</td>
<td>• Conservation grants</td>
<td></td>
</tr>
<tr>
<td>Brooks, 2004)</td>
<td>• Major gifts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Corporate agreements</td>
<td></td>
</tr>
<tr>
<td><strong>Mission Delivery</strong></td>
<td></td>
<td>Chief Conservation Officer</td>
</tr>
<tr>
<td>(Bode, 2017; Dollery &amp;</td>
<td>• Development of programs that further the work of the NWTF</td>
<td></td>
</tr>
<tr>
<td>Wallis, 2003; Hansman,</td>
<td>• Implementation of programs that further the work of the NWTF</td>
<td></td>
</tr>
<tr>
<td>1986; Allison &amp; Kaye, 1997)</td>
<td>• Work that meets the 4 fundamental goals of the strategic plan (Appendix A)</td>
<td></td>
</tr>
<tr>
<td>**Volunteer/Community</td>
<td></td>
<td>SVP of Field Operations &amp;</td>
</tr>
<tr>
<td>Engagement</td>
<td></td>
<td>Volunteer Management</td>
</tr>
<tr>
<td>(Cnaan &amp; Amrofell, 1994;</td>
<td>• Ability to connect with local constituents</td>
<td></td>
</tr>
<tr>
<td>Dwiggins-Beeler, Spitzberg,</td>
<td>• Involve the community in the mission</td>
<td></td>
</tr>
<tr>
<td>Roesch, 2011)</td>
<td>• Engage the public in the work of the organization</td>
<td></td>
</tr>
<tr>
<td><strong>HR/Operations</strong></td>
<td></td>
<td>Chief Financial Officer</td>
</tr>
<tr>
<td>(Guo et al., 2011; Condrey,</td>
<td>• Policies and procedures in place for reporting and conduct</td>
<td></td>
</tr>
<tr>
<td>1998; Farazmand, 2004;</td>
<td>• Developed and maintained by the national office</td>
<td></td>
</tr>
<tr>
<td>Perry &amp; Mesch, 1997; Lynn,</td>
<td>• Executed in compliance with national's requirements</td>
<td></td>
</tr>
<tr>
<td>2003; Pynes, 2004)</td>
<td>• Recruitment, retention, &amp; training is managed in this area</td>
<td></td>
</tr>
<tr>
<td><strong>PR/External Communications</strong></td>
<td></td>
<td>VP of Communications</td>
</tr>
<tr>
<td>(Cutlip, Center, &amp; Broom,</td>
<td>• Creates and promotes the organizational language</td>
<td></td>
</tr>
<tr>
<td>2006; Routzahn &amp; Routzahn,</td>
<td>• Shared language to promote the mission</td>
<td></td>
</tr>
<tr>
<td>1928; Shankman, 2007)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Phase 2.** The second phase of data collection was primarily an open-ended email questionnaire. The purpose of this phase was to determine similarities and differences between the expectations the senior executive team assigned and the understanding of their direct reports. Additionally, this phase offered management perspectives on overall alignment, communication strategies, training opportunities, and clarity of the alignment variables. Figure 12 illustrates the positions of the 11 management team members that participated in Phase 2 of the data collection.

*Figure 12. Phase 2 Hierarchy*

**Phase 3.** An electronic survey system was used to distribute and collect data. There was consideration of the online tool use and accessibility when deciding distribution and collection procedures for this study. However, the online survey tool was distributed through employer
email systems and completion of the online survey was approved as an acceptable online practice therefore, it was deemed an appropriate distribution and collection method. The survey consisted of 43 questions specifically concentrated on understanding the mission-centric behavior and expectation perceptions within the five categories listed.

*Likert scale analysis.* The Likert Scale included an ordinal rank of responses. Strongly Agree, Agree, Neutral, Disagree, and Strongly Disagree. In this research neutral is not an unconnected reply. It is a part of a hierarchy of opinions, with a definite location in the order. Neutral responses means that the respondents did not have enough information to express an opinion or that there were equal numbers of positive and negative thoughts about a question, whereby the respondent was unable to determine a positive or negative response. The Likert Scale is meant to be ordinal data and cannot be analyzed as means and standard deviations.

According to the research a respondent may select “neutral” for two important reasons instead of as a ranking of ordinal data. Those are ambivalence and indifference (Cronbach, 1946; DuBois & Burns, 1975; Edwards, 1946; Goldberg, 1971; Kaplan, 1972; Worthy, 1969).

This research does not treat the middle value of the Likert scale, “Neutral”, as indicating indifference when rating personal perceptions additionally, neutral does not mean “no opinion”. Since the sale also offers the “N/A” option indifference can be identified in that selection and not with “Neutral”. When “neutral” was selected this allows for subjective analysis. Asking if a significant number of respondents selected “neutral” to indicate their perception that the topic is in fact not strong or weak enough to convince a respondent, should that topic/question be noticed by the organization seeking to advance mission alignment through shared understanding?

According to Hernández, Drasgow, & González-Romá (2004), an “ambivalent respondent chooses the middle category because of mixed feelings about the object of
evaluation” (p. 280). In addition, the literature suggests that “neutral” is selected for a variety of other reasons. These include the possibilities that respondents (a) have a specific response style, (b) do not understand the statement, (c) do not feel competent enough or sufficiently informed to take a position, or (d) do not want to reveal their personal feelings about the question asked (Cruickshank, 1984; Dubois & Burns, 1975; Worthy, 1969). This research accounts for “Neutral” to indicate only that the respondent was not convinced enough to select agree/disagree.

N/A was included outside of the scale for each Likert Scale question. In this survey, N/A is meant to indicate “not applicable” and therefore intends for the N/A response to be selected by respondents that have no position where they have an opinion or perception of the question being asked.

**Data Analysis and Procedures**

The methods are designed to continue to inform our resource dependency theory as well as better understand the importance of reflexive behavior. Data was collected from survey responses as well as interviews and entered into a qualitative data management system (Dedoose). The dependent variable, *mission alignment*, is what regional staff should emphasize when working with local constituents.

**Phase 1.** After the six interviews were complete the recordings were transcribed and entered in the qualitative software, Dedoose. The transcriptions were coded to identify the themes in the data (Figure 13). These senior executive insights were used to illustrate the process of defining and communicating mission expectations to field staff. It was the first step to defining “alignment” as more than a budget measurement. Defining alignment beyond the revenue inputs allows the organization to consider measurement of an output within these variables as a component of mission alignment, as well. In order to accomplish this
understanding of alignment, relative to the organization, at the onset of the research the senior executives considered a multiple part question set. First, what do you consider success in these variables? Second, how do regional offices know your definition of success? Lastly, how is that success tracked and measured. These questions highlight the importance of the concrete output as well as the qualitative understanding of the five variables and the shared understanding of each.

Figure 13. Codes for Phase 1 Transcriptions

Phase 1 was designed to understand the five variables as well as the perceived organizational design and communication flow within the staff. Each senior executive participated in a face-to-face interview where the same questions were used to guide the dialogue. The interviews were scheduled to take approximately 60 mins however two of the six surpassed that expectation. It was evident during this phase of the research that the senior
leadership were committed to the research and participated with no reservation evident during the interviews. The results of Phase 1 are detailed in Chapter IV and discussed further in Chapter VI.

**Phase 2.** Eleven email and phone interviews were transcribed and entered into the qualitative software, Dedoose. Similar to Phase 1 coding, themes were identified that addressed the five variables (Figure 14). The purpose of Phase 2 was to obtain open-ended responses on middle management perceptions of alignment variables, expectations, and how those expectations are communicated, tracked, and recognized. The Phase 2 data was important because this audience is the first line down from each senior executive. Here identification of consistencies/inconsistencies in shared understanding and mission alignment is understood at the manager level.

**Figure 14.** Codes for Phase 2 Transcriptions

**Phase 3.** All survey responses are anonymous and only the cumulative response results were shared with all members of the organization. Interview data collected did not include any
identifying information in analysis and final report. The response rate of 75% demonstrates this reliability.

The final analysis includes all five variable assessments and illustrates a shared understanding (or lack of) of success indicators. Survey responses are used to inform the analysis of shared meaning for mission alignment variables. The shared understanding of the variables and alignment is evaluated based on expectations set from the national office, as described in the initial phases of data collection. Phases 1 and 2 were designed to find an expected set of behaviors, outcomes, and metrics to compare the understanding at an all staff level. Senior executives and management defined the standards of each variable as well as a perception of success measure for the field staff.

The interview and questionnaire information was entered into Dedoose to understand the categorical data. A process of defining measurements and creating ordinal data sets from the survey responses allows representation and analysis of the five alignment indicators. The alignment analysis is based on the respondents shared understanding of the expectations that were communicated in the Phase 1 and Phase 2 interviews.

**Limitations of the Three Phase Design**

Multiple organizations should be sampled to produce a generalizable assumption about these five variables and their relation to mission alignment across the corporate nonprofit model. This study is an initial step to observe and inquire about the alignment assumption and relationship, intra-organizationally. This affords the opportunity for the study and findings to create a high level of significance (Lovitts, 2007) by adjusting national corporate nonprofits evaluation practices of local offices. Accountability and comprehension of directives, value and responsibility can be
assessed to create a stronger sense of alignment between national and local. Minimally, this research can provide support for an incremental adjustment to the conversation recognizing mission-centric alignment using specific variables as a tested methodology for the practitioner. It is intended to lead to concepts, models, and tools that can be replicated by other organizations within the national nonprofit corporate model.

The subsequent chapters will provide findings and discussion of the three-phase study. In Chapter IV Phase 1 and 2 data and results are provided. Chapter V provides the results from Phase 3. Lastly, Chapter VI will focus on the discussion and conclusions for the research.
CHAPTER IV
DATA AND RESULTS- PHASE 1 AND 2

The initial phase of data collection included face-to-face interviews at the headquarters office in Edgefield, SC. Phase 1 was an important beginning point for this case study. This phase focused on understanding the NWTF hierarchy, management team expectations, and finding commonalities and discrepancies between interviewee responses of the five variables and supporting questions for the following phases. The data generated was used to better inform the research to design Phase 2 and 3.

After developing an understanding of the executive team’s expectations and their perceptions of communication, standards of success, and (where possible) the quantifiable or demonstrated metrics for staff in each variable, the research better defined “shared understanding.” Accepting that, due to the corporate model hierarchy, it is the understanding of the leadership that drives the alignment expectations of the staff. This made starting at the senior level a natural first-step.

Phase 2 offered a different insight into the shared understanding of the variable expectations. Phase 2 respondents were all mid-level management team who are direct reports to 1 of the 5 senior executives, interviewed in Phase 1. This second step of data collection was to determine the shared understanding between the levels of the organization. The alignment behaviors noted in Phase 1 were explored in Phase 2 to identify expected behaviors.

Initial interviews were conducted on-site at the National Wild Turkey Federation’s headquarter office in Edgefield, SC. These 6 interviews took approximately 2 weeks to complete.
Phase 2 of the data collection was performed primarily via email during a 3 week period. Two of the 13 respondents in Phase 2 were face-to-face during the travel for the Phase 1 interviews. Due to logistics and scheduling limitations, those two managerial staff, whom are based in the headquarter office, were able to conduct a face-to-face interview instead of the email the other Phase 2 respondents received. Additionally, 1 respondent of Phase 2 requested a phone interview for data collection. All email responses, phone conversations, and face-to-face interviews were transcribed and analyzed in the Phase 2 review.

In the analysis the research seeks to study the causes and implications of alignment or lack thereof. In doing this, the hypotheses are discussed throughout the results and used to demonstrate how and why resource dependency and reflexivity theory pertain to the context of alignment and developing a shared understanding of behaviors, metrics, and outputs between national and regional staff.

**Phase 1: Senior Management Interview Results**

This initial step in data collection directly relates to creating definitions that support all of the research questions. 1. How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables? 2. To what extent do regional offices/field staff believe their office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.? 3. Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided? 4. To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance? 5. What mechanisms are in place for the national office to
evaluate regional sites and what is evaluated? 6. What are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the alignment indicators?

Phase 1 consisted of interviews with the six organizational leaders that comprise the leadership team at NWTF. These included: the CEO, VP of Communications, CFO, Chief Conservations Officer, Executive VP of Marketing and Development, and Senior VP of Field Operations and Volunteer Relations. This team of 5 under the CEO comprise the senior executive leadership team.

Using a set of questions as an interview guide all interviewees answered questions focusing on the same alignment indicators, as each relates to their role and knowledge of the organization. The five senior executives were interviewed face-to-face in Edgefield, SC and the chief operating officer was interviewed over the phone, due to scheduling limitations. All interviews were transcribed, entered, and coded using Dedoose software. The response rate was 100%.

Six headings of data were collected: the five variables, as well as an initial discussion with each executive, identifying perceptions and understanding of basic organizational design components. The Phase 1 interviews provided insights of the general perception of the organization’s design in addition to the five variables used to define and measure alignment. Additional headings include: Information dissemination, field staff freedom, and the overarching response to “Is alignment a concern?”

The interview design was created around 4 key questions:

1. What is expected of the field staff? (What is success?)
2. How are those expectations communicated to field staff?
3. How are behaviors that meet those expectations tracked?
4. What are the feelings/perceptions of regional success, given the expectations?

During the analysis of the Phase 1 interview data interesting discoveries were made. Because the expectations of the senior executives were a critical starting point for the data there were only a few expected findings. Those included (a) structured/required communication comes in the form of memo-style emails from senior management (b) organization expectations and standards are tracked by a standard performance appraisal system, similar to the literature on measurement and performance appraisals reviewed in Chapter II and (c) the shared commitment to the mission at the senior level of the organization was deafening.

The primary unexpected finding from the analysis was the lack of alignment expectation clarity for each indicator among/between the senior executive level. This became evident as the interviews proceeded. Each executive had a variation of the variables to assess alignment. There was no variable that elicited a consistent definition from this group. There were similarities in each description but the specificities varied such that it became evident that the Phase 2 and Phase 3 participants should have a lack of clarity and shared understanding based on the organizational leadership expectations. In contrast, based on the responses in Phase 1 the communication between the direct report and the mid-level manager, individually, seemed consistent and effective. The concern is, if each executive has a different standard of alignment and each executive is communicating with their direct reports, then the chain of command communication is only receiving one senior leader’s expectations for the department instead of a shared understanding of alignment throughout the organization- across departments.

Each interview followed 6 topics for alignment understanding. Organizational/framework expectations, fundraising expectations, mission delivery expectations, volunteer/community engagement expectations, HR/operations expectations, and PR/communications expectations were
all discussed to illustrate alignment expectations.

**Organizational/Framework Findings**

**Informational dissemination.** Identification of formal communication modes were consistent throughout the senior team. All six concurred with the following when asked: *What is your perception of how information is disseminated through the organization?* NWTF uses a primarily top down communication approach to communicate across the organization. One Phase 1 respondent noted “[a] majority of our information to our local chapters [goes to] our regional directors and to a lesser degree our regional biologist. They are our paid staff and represent our national organization.” Additionally, one respondent stated that “information is disseminated, primarily through the heads of department [and then] the department heads to their staff.” Another respondent conferred, “a lot of discussions start in the management team meeting and cascade down.” All agreed that the main flow of information through the organization was through a chain of command approach. The corporate model structure for NWTF is supported through these comments based on an understanding of the authority and decision-making power for the organization.

**Frequency, mode, and consistency of communication.** “[We meet] as an entire management team through the quarterly meetings we do, and we record those and send those out.” Monthly meetings with direct reports were highlighted. However, it was clear that the process of internal communication was not the same frequency, mode, or consistency for each senior executive. “The management team, organizational structure, direct reporting…does not necessarily work the same way in every department. All have staff meetings, but it depends on who attends those meetings by department.” Another respondent shared, “As far as [internal communication] procedures that are defined, we don’t have any. There is a traditional share with
staff, staff share with state organizations, and staff share with local organization.” One respondent acknowledged that the communication mode and message depends on the topic. “If it is policy positioning that would come out of our Chief Conservation’s office. If it is a fundraising matter, a sales matter, it would go from the VP of Volunteer Relations and Operations.” Information is also available throughout the organization via daily reports for the territories “they can also get their inventory report daily, their AR report, their PNO, what merchandise is shipped and where it is shipped to daily and then they also have the ability to forecast their area and look at how they are doing to hit their overall number by year…We do all the forecast modules that they can go and look at…” Furthermore, a respondent did identify efforts to keep the information flow open, “we endeavor to have people copy all interested parties [in email].”

Information dissemination in a hierarchical nonprofit tends to start at the top and filter down, NWTF is no different. In an effort to improve the current process and respond to a continued need for seamless transfer of information across the organization 2 of the executive leaders will be transitioning to quarterly calls with regional directors and regional biologists that will also include the volunteer leadership at the local level. “We have very little conversation with those internally …until we get to the last quarter and we really should be doing that throughout the fiscal year.” The quarterly calls will help facilitate a more complete information share schedule.

One respondent shared “We also fall down in assumption and probably in follow up communication…retention isn’t always there. It is challenging to get seventy plus regional directors to remember to pick up the phone and call if they don’t have an answered request.” Efforts are constantly being made to address the challenges of information dissemination frequency, consistency, and mode from leadership. Senior leadership also expects internal communication between their reports. “The expectation is that they [regional biologists and
regional directors] communicate with one another.”

**Field staff freedom.** Autonomy can demonstrate a level of trust and ownership. The organizational structure at NWTF attempts to be reflexive enough to support the interests of the regional landscapes. During the interviews one senior executive compared the freedom that was once given to the field staff to the design now. “If you were here years ago, I would say no. There were definitely policies and procedures, in which there still are today, but there was no flexibility. Today, we give them some flexibility. A lot comes from how we arrive at their budget numbers….They have control…” The control the leadership describes above comes from a broad budget number each regional director is given and their authority to determine the best way to reach the “stretch” goal number.

The leadership team has made a conscious decision to create new positions at the national office to support the regional teams. The Customer Service Representatives are one example. The CSR team provides more clarity and ease to the field team and eliminate cumbersome phone calls and emails to get answers while in the field. Information was mission and lacked uniformity and clarity throughout the organization prior to the CSR placement. One executive said “before, it got lost in translation, so we went back to saying ‘okay you need one person to call’. One person to call and resolve [issues] and that has worked very well.”

Field staff are encouraged to generate new ideas. “They have the flexibility to float their idea and it usually comes to Finance first. It may start with their supervisor but then to finance…we will vet it to make it happen, if it’s viable.” However, the oversight is not minimized. The Super Fund is unique to NWTF in that it is a pot of money the national distributes back to the local office for additional services. However, the funds should be used to advance the mission. “We try to make sure that it’s [Super Fund requests] mission related. To make sure they are not
just building a church…you can’t do that.” If a local chapter doesn’t want to do outreach events to advance the mission they are not required to. The bylaws only require that a local chapter host one annual banquet fundraiser. Beyond the single event fundraiser each local volunteer chapter can work with their regional field staff to determine how to best use the Super Fund dollars that are distributed back to the chapter as a rebate each year. The field team has the autonomy to do with those dollars what best suits the chapter, as long as the funds are used to support the mission. One respondent noted that it is their perception that the problem is not that field staff don’t have the autonomy to act in their region but that some lack the willingness to use it. We have struggled…getting people to act independently. There are certain parameters they must act within, in terms of field operations…but how it happens is very much up to them. We have some checks and balances in place, but we look to them to give us guidance and make those decisions [in the field].”

**Organization Framework and Field Staff Freedom Hypotheses**

Five hypotheses were evaluated based on organizational framework and field staff freedom. Based on Phase 1 data collection these hypotheses are perceived by the senior leadership team as true. The five hypotheses are:

(REFLEX) H₀: Regional offices’ understanding of fundraising models and expectations allow greater reflexivity in creating fundraising opportunities that align with national expectations and goals.

(REFLEX) H₀: Regional offices’ understand the expectations of mission delivery designed by the national office and are able to develop infrastructures that fit the needs of the individual communities for effective mission delivery.
(REFLEX) H\(_0\): Regional offices understand the expectations of operations and human resource practices designed by the national office and are able to develop infrastructures that fit the needs of the community.

(REFLEX) H\(_0\): Regional offices understand the expectations of volunteer engagement designed by the national office and are able to develop infrastructures that fit the needs of the community for effective volunteer models.

(REFLEX) H\(_0\): Regional offices’ understanding of public relations models and expectations allow greater reflexivity in creating mission-based messaging opportunities that align with national expectations and goals.

Reflexivity theory can explain the development of programs and policies that best fit the local conditions; seeking to understand the target audience in specific markets. However, reflexivity does not discuss the understanding of the expectations between the levels of the organization. Both components of these hypotheses demonstrate alignment through communications and creating a shared understanding, as well as through implementation of supported and relevant programs and policies.

The leadership team believed they have granted permission to allow for flexibility in generating funds, volunteers, and messaging. Although, the freedom is limited and granted only after each region has produced the required levels of banquet fundraising, based on the budget allocations. A separate senior executive noted that the field staff are creative and the field staff positions allow for more creativity, more flexibility. “For individuals who crave that, which is what we select, that is very rewarding.” A different senior executive team member noted “it is our job to give [the field staff] opportunities to cultivate their relationships.” However, there is a struggle managing the field staff because many of them are too creative and take liberties in the field that
have national ramifications that they had not considered but also, in contrast the field staff can become frustrated when so much freedom is given to them to serve their community as they see fit and they don’t know how to respond. The field staff “are used to a very hands on, top down ‘what do you think we should do?’ approach.”

**Is Alignment a Concern?**

Interview results indicated the five senior executives and CEO, in general, said that the feeling of shared commitment to the organization and cause was clearly identified but the shared understanding at the leadership level was not consistent. When asked “Do you think the management team, as a whole, is on the same page?” One respondent said “No, no they are not. In general I do think we are at the highest level. I think we have differing opinions of how we get there and what we emphasize.”

All six leadership members were asked the same overarching question: *Is alignment of the field staff and regional offices with the national directives a concern?* Three said yes and offered examples to illustrate their feelings, three answered no, but went on to say it wasn’t a concern now because it had been worse in previous years under different leadership and that the staff and national organization were learning. One noted “Yes…I think there is a concern…because there is a breakdown of communication. Sometimes there is a resistance on the local level. It’s an ‘us vs. them’ mentality and I think that’s real.” Another shared “no, [alignment is not a concern], I think they are trying to do their job and keep up….completely aligned? No, but understandable not.” Another said, “I think that [alignment] is something that we will continue to work on. I truly believe we have made a lot of inroads. But I don’t see this as a concern, I think that there is a lot more we can do.” One respondent stated, “[Alignment] has been a concern since I got here. It was a major concern when I got here. It has been an issue. The informal training or acculturation
process is pretty strong.”

**Alignment concern hypotheses.** Two hypotheses were evaluated based on alignment concern, which included:

(RES DEP) $H_0$: National office uses varying methods of communication to express clearly defined mission delivery expectations for the regional offices in order to promote the mission of the organization.

(REFLEX) $H_0$: National office’s recognition of varying needs for communication effectiveness impacts regional offices’ understanding of purpose and direction to better align with communication goals.

While the question asked about the alignment between regional and national multiple respondents moved the dialogue to an acknowledgement that the senior executive team and other management might have a varying perception of the organizations next steps and needs. Indicating that these members of the organization’s leadership seemed to lack alignment. Another executive leader mentioned that conversations happen at the leadership level “we talk about it for a little while and then it sort of goes back and loses the emphasis.” The lack of continuity in communication demonstrates that the working hypotheses presented above are not true. However, it would appear, based on Phase 1 responses regarding alignment as a concern, that if those two hypotheses were true the shared understanding may be increased and alignment behaviors would be more understood.

**Fundraising Standards and Expectations**

Generating revenue for the mission is a focus of the organization. Multiple respondents noted that raising funds was everyone’s responsibility. Through much of the interview process it
become evident that multiple people share oversight of the fundraising efforts. Many activities are considered “fundraising” so in that respect the Field Operations leadership manages the 77 field staff positions (regional directors, etc.) Marketing is responsible for approximately 15 people in the corporate agreements, licensing, and major gift acquisition. Lastly the Conservation leadership oversees the team of regional biologists, approximately 50 people (headquarter staff and field staff), that produce a significant amount in agency and federal grants to support the mission work in the field and at the national level.

**Fundraising Expectations**

Fundraising expectations are the most clearly defined. They are required to meet budget and do one Hunting Heritage banquet per chapter. “Their charter says that the only thing they have to do it have one Hunting Heritage banquet a year. That’s it. That’s the only fundraiser that they have to do.” Regions are expected to demonstrate budget success through upward trends, “trending backwards, as a management team member, that is an indicator” of meeting fundraising expectations. “They all have sales goals if they’re a regional director.” A separate senior executive said the fundraising expectations were determined in four ways: “one is to bring in the revenue… the second is, grow their volunteer base, the third is, increase their membership, and the fourth is intertwined…communication of direction, mission, and procedure with their volunteers.”

In contrast to what seems to be clearly defined expectations, one senior executive stated, “The issue is not what they do, it is what we expect of them, what we think is possible.” Another inconsistency, “people view fundraising as mission delivery, I view that as an activity to support mission delivery.”

Fundraising is at the demand of the national office but the will of the regional decision-making. This relationship is dependent upon the fundraising work of the regional offices and in
return the national office supports each regional team. One senior executive respondent said “we
gave access to our local staff, the regional director. So the information they send to us…but of
course we provide services, all sorts of technical support back to them when it comes time to do
mailings, or set up events, or print tickets.”

**Fundraising expectations hypothesis.** One hypothesis can be evaluated considering the
fundraising standards and expectations of the organization using the theory of resource
dependency and the behaviors of both the national and regional staff.

(RES DEP) H₀: The purposes of the regional and national offices are clearly understood to rely
on both offices to raise funds through mission-centric donor involvement.

Interviews indicated that the regional team is responsible to the event and “they work with
the volunteers to [determine] what type of fundraiser they want to do (silent auction, live auction,
etc.) What type of game they want to run, what type of raffles, etc. and how are they going to do
that.” “[The] organization really survives on its chapter system and the fundraising banquets that
they conduct.” However, another senior executive stated “I feel very removed from the banquet
process.” Additionally, the conservation team does a significant amount of grant writing and
dollar generation, as well. “I think everybody in this company has a responsibility to help
fundraise for the mission. [Some] fundraising activities might be a little different that some
others, but nonetheless it’s very much within it.”

Throughout the senior executive interviews language inconsistencies within the fundraising
variable were present. For example one respondent said, “What we call marketing here, is really
corporate relations, or sales.” Also, “where we should be using sales and dollar, but for some
reason ‘sales’ carries a negative connotation in the nonprofit world so we shy away from it.”
Skills to be Successful at Fundraising

The Regional Director’s role, out in the field, is “about creating new volunteers, motivating those chapters, trying to get new events scheduled, raise money. Tying them into our mission and direction, it’s hard. They are away from their home almost every night during events.” Hiring the right person has become a new focus for the organization, “we have put a lot more effort in having better job descriptions and stating very clearly what our expectation is and what the job responsibilities are and what the demands of the job are.” “People who are attracted to work for this organization come…out of passion and wanting to make a difference, wanting to do something ‘good’, but don’t necessarily see themselves as sales people when in fact they are…we have a lot of employees who thought they were here to turkey hunt.” Another respondent shared that to be successful at fundraising and demonstrating success in fundraising the regional team need to “manage their budgets. That’s really it.” One of the problems that one respondent highlighted was that “we had taken our best fundraisers and said ‘you’re a great fundraiser, it must mean you’ll be a great manager’ and we implemented the Peter Principle.”

Fundraising Expectations Tracked and Communicated

Phase 1 responses were consistent, in that, the understood process of tracking fundraising efforts is through the budget system and bottom line reporting. However, it appeared vague to some of the senior executives. “I guess the chapters have a reporting system.” Fundraising is tracked at the national level “in terms of the money [the regions] have available in their budgets in order to accomplish work. It is usually written in their performance objectives or expectations in terms of partnership dollars…”

Other senior executives were very clear about the process and success measures. Fundraising expectations are communicated to the regional directors on an annual basis. “That is
their work plan and this is very clear. We run this company against an annual budget.” “There is an agreed upon budget and it is very detailed so everyone knows their part…and then we start forecasting three months into the fiscal year, so it is constant.”

**Fundraising expectations communicated hypothesis.** The Phase 1 responses continue to illustrate a top-down hierarchy with a rigid process of communicating fundraising goals and expectations. One hypothesis was evaluated using reflexivity theory to better understand the organization communication impact on perception.

(REFLEX) \( H_0 \): National office recognizes the varying needs for communication effectiveness and how that communication impacts regional offices’ understanding of purpose and direction to better align with fundraising goals. Reflexivity helps model the environment where the budget is not the only mechanism to track success.

**Regional Fundraising Success**

Regional success is “development-centric. Success for the organization is a result of an increase in mission delivery.” “They are really working their tails off out there and they do it through having great relationships…to move the needle on the habitat or the hunting heritage program.” Overall, the regional teams are in a strong place and the “job satisfaction is there and the drive to improve is there.” The toughest part of regional director’s job is keeping everyone focused on the mission. “We’re successful if we keep our local offices informed and engaged in what they are raising funds for in the big picture of fundraising.”

The inconsistencies that presented during this dialogue were between how success is communicated and tracked compared to the overall feeling of success. When asked about the expectations ideas of budget systems and black and while reporting structures were identified
however when asked about the senior executives feeling of regional success most suggested that the field staff are doing good work and focusing on the mission. This mixed-message may be the beginning of misalignment using fundraising as an indicator.

**Mission Delivery Standards and Expectations**

Most of the conservation direction is under the oversight of the Chief Conservation Officer. This team consists of approximately 50 staff. They work to move the mission of the organization forward through the “duality of the mission…it was the only group that recognized the importance of true species and its mission. The animal and honor. Save the Habitat, Save the Hunt.” “A lot of people get involved with the NWTF for different reasons...So, tracking the program delivery is important.”

**Mission Delivery Expectations**

If the mission delivery “has produced money, or it has produced numbers, or something significant happened because of it and it becomes the basis for national adoption.” Mission delivery expectations vary among the leadership team. One expectation is “continued growth, its donor satisfaction, and its repeat commitment. That is the ultimate measure.” During one interview a respondent shared that many regional directors don’t understand the mission work to sell the mission and many of the regional biologists don’t want to think of themselves as sales people to raise money for the mission. “Adoption of programs would be a measure of success.”

**Mission Delivery Expectations Tracked and Communicated**

“Staff with performance evaluations we can track and put a thumb on…” However, the national office doesn’t have an approved list of mission-related programs that the regional offices can be spending their funds or investing their time to raise mission awareness. When asked if there
was a list of every chapter that is doing each program the response was “no, we have a general idea based on Super Fund allocation.” There are programs that the regional staff facilitate that are not considered in alignment. Those programs “are not core…” There are ways of tracking programs and mission delivery, “we have numbers in each…they self-identify.” The mission delivery programs that are not core were “built as filler”, before the refocused direction was applied-Save the Habitat, Save the Hunt.

While it seems that many outreach programs are based on Super Fund allocation and at the mercy of the local volunteer’s wishes and the regional team’s direction, the hunting heritage mission delivery is more measureable and has established quantifiable outputs.

“We have a whole book to define how we count acres. We define various aspects of habitat management that we do and we put some parameters around it. So, if you plant trees, how many acres is a tree worth, Same thing is true, we have a handbook on how we count hunters, how do we appropriately count the number of licensed hunters created? This is kind of the ground rules on how we do it.”

**Regional Mission Delivery Success**

Success measures are varied in mission delivery. There appears to be a set of definitions that have been created to identify success, per the national expectation, however it is not clear if those definitions are common knowledge throughout the organization. Staff do not seem to be clear, based on senior executive perceptions, of how to record the successes for tracking and progress “The mission actually getting accomplished is very successful. I think recording it is still a work in progress.” “I think our local mission delivery is strong.” Success in mission delivery is “really the future of our organization and it’s really the future of our industry. If we don’t engage youth in hunting and shooting, it’s going to go away. So success is when we grow
Jakes members and/or number of events we have a year…” To be successful in mission delivery one respondent stated that the regional staff needed “to do the mission delivery and record the mission delivery…” There were varying ideas of what mission delivery success was at the senior level.

**Regional mission delivery success hypothesis.** One hypothesis is assessed and supported. Given the greater reflexivity and understanding of resource dependency the national office perceives greater alignment to the expectations of the senior executive team.

(RES DEP/REFLEX) \( H_0 \): Regional offices understanding of mission delivery models and expectations allow for greater reflexivity in creating opportunities that align with national expectations and goals.

Mission delivery at the regional team level is reflexive. “Where we have really good regional directors and regional biologist interactions, where they are working as a team we tend to see better results for that state…it just seems to run on all cylinders at that point.” “…the program implementation part of it. When the teams are working how we’d like them to work if the regional director is working very closely with the biologist that they know what the biologist is working on in terms of projects and the biologist shares that with the regional directors so they can use that information to try and recruit new members and drive excitement and leadership in our program delivery.” “We have a lot of regional directors who can’t really tell you what the regional biologists do in terms of managing lands and managing timber cutting in terms of sales, or putting in food plots or working and repairing areas.” Understanding the dependency both the regional biologists and the regional directors have toward one another provides insight to the expected inner-workings of the regional team. When asked, one senior executive suggested that the regional directors & regional biologists would connect bi-weekly in a formal dialogue and as needed
regarding issue-specific topics. This communication expectation seeks to enforce the need for regional reflexivity to support the community they serve.

**Volunteer/Community Engagement Standards and Expectations**

A majority of the volunteer recruitment and engagement function is overseen by Field Operations staff, including the team of regional directors. A portion of newly developed Hunting Heritage programs are meant to engage a different volunteer base which are overseen by the Conservation team.

The volunteer engagement needs have changed over the last ten years. “We worked ourselves out of a mission…the only thing we did differently was we started ‘Jake’s Programs’. I mean we need a youth program that resonates with a different group, so that goes great. So then it was what we do for the kids and what we do for the turkeys. Well then we didn’t need too much for the turkeys…banquet attendees started saying ‘you did a great job, folks. What are you going to do with my money now?’ It was all good stuff but as we moved forward into the Save the Habitat, Save the Hunt, it’s tough to change the direction of those volunteers.” This theme was present nation-wide and was the genesis of the new Save the Habitat, Save the Hunt initiative.

**Volunteer/Community Engagement Expectations Hypothesis**

The expectations for community engagement may be difficult to quantify. For example, response like: “I don’t think we communicate it very well as an organization down to the regional directors to give them something tangible to hang onto. I walk into a banquet and there are a dozen banner stands…and one of them is talking about mission delivery, something’s wrong.” Using these qualitative data responses, one hypothesis was considered based on the understanding of volunteer engagement expectations.
Regional offices’ understanding of volunteer engagement models and expectations allow for greater reflexivity in creating opportunities that align with national expectations and goals.

Having this relationship with each set of volunteers for each event throughout the regions demonstrates the importance of a reflexive regional director and regional biologist team. This hypothesis was supported by the senior leader’s expectations of the regional teams to work with the local events to engage in a relevant and purposeful way—specific to the community.

**Volunteer/Community Engagement Tracked and Communicated**

“We don’t do a very good job tracking our volunteer base. So, direct communication with our volunteers...doesn’t happen effectively.” Tracking volunteer engagement is a difficult task for the organization. When asked if volunteers are tracked the response was “Yeah, they are not tracked effectively. We keep committee rosters which are a manual upload, but what we find is there is a lot of turnover or there is a lack of information. Tracking volunteers is “our primary hurdle in our communication deficiencies.”

Success for the field staff in volunteer management is tracked through the regional director’s performance objectives. They are rewarded in terms of the revenue they are bringing in, based on membership per state. Volunteering and community engagement is primarily tracked through the regional director’s. One response indicated that success and tracking the success was anecdotal. “It’s really, in my mind, is for us to get more facetime with the volunteers.” Another shared that “call frequency in general, between ourselves and the volunteer leaders is [currently] unacceptable.”

**Volunteer/Community Engagement Regional Success**

“A success for me is that if we’ve heard about [a story] before Google told us…we are
finding out significant things that are happening in the field through Google after someone else told a story about it.” “If we were successful at the local level in volunteer engagement, then we would have fresh faces, we would have decided recruitment is our number one priority. We don’t do that yet…It is critical.” “It is successful…We can’t allow our volunteer to be focused on their community or in their county. It’s got to be focused on the bigger picture.” When asked to rank the regional success in community engagement and volunteerism on a 5-point scale, one respondent said “I would give them a 2.5 or a 3.” Ultimately, one senior executive noted that success in volunteer engagement is “…membership forecast relative to plan and relative to prior year. It is the ability to lead the [volunteers] to strengthen the committees. We also need to do a better job recruiting and adding chapters.”

Volunteer/community engagement regional success hypothesis. For an organization that prides itself on the local work, mission delivery, and community engagement volunteerism is vital to the work plan. The responses from Phase 1 suggest a perceived reflexivity and resource dependency understanding. One hypothesis was evaluated based on regional volunteer engagement success.

(RES DEP/REFLEX) H0: National office creates volunteer policy that fits the infrastructure design of each local office, given their local conditions.

However, when specific examples were sought out, respondents struggled to suggest infrastructure models that seek to understand local conditions. When we seek to understand how the regional offices are connecting with the community and what the expectations are from the headquarters office there seems to be a lack of clarity for expectations and direction. One respondent said “I think it is a matter of work plan or performance metrics, or what they are held accountable to and on this end, what we value and put an emphasis on.”
Using RDT and reflexivity to support this hypothesis it is apparent that many senior executives believe that the volunteer recruitment strategies are at the hands of the regional staff with limited internal support for cultivating. Multiple comments indicated the lack of reflexivity between national and regional to create volunteer models but rather a static expectation of volunteer development. Success measures were noted, “If we don’t hear about it, if we don’t get any kind of feedback: or an example of a story that would be included in a magazine in a regional section, something that is shareable through Facebook, or if it doesn’t pop up.” “The metric…they [volunteers] have to tell the story back to us.” “People don’t understand that you are part of something bigger and brighter; an initiative, a mission.” “We can’t celebrate that success with you. We can’t promote that for you…all that has to happen at the local level.” The intent from the senior management appears collaborative, however it is actually one-sided and asks the field staff to report back instead of engaging in reflexive dialogue to understand the volunteer needs and community efforts or honor the critical importance volunteers have on the national organization.

**HR/Operational Standards and Expectations**

Human Resources and Operations are the crux of policies and procedures. The Operations leadership overseas a team of financial and human resource professionals (approximately 65 positions). The field staff are asked to follow the best practices and protocol that strengthen the organization’s brand, accountability, and transparency to donors and volunteers. “Chapters who take reporting seriously or who follow protocol…they are the ones that are going to be more engaged…” However, in contrast there are also team members that are uncertain of the Operations processes, what is expected, and how it is tracked. For example, one respondent stated, “I don’t
know what their system looks like, and I don’t know who is responsible for what, but they do track.”

**HR/Operational Standards Hypothesis**

Both RDT and reflexivity theory support the implementation of operations policy that addresses local conditions and needs. One hypothesis was evaluated based on HR standards using Phase 1 data.

(RES DEP/REFLEX) $H_0$: National office creates operational policy that recognizes the infrastructure design of each local office, given their community conditions.

Given multiple responses, it is clear that policy is designed at the top of the organization. The organization’s operations are housed primarily under the CFO’s direction and there is little expectation for reflexive discussions to create policy that responds to the needs or direction of the field staff. “Our strongest entity in the organization, when I got here, was finance. We were accounting-driven and we were headquarter-centric. Meaning, if you raise money for us and you do it our way, report it our way…we are strong here, but we’ve…softened, which has been helpful.” “We are only as good as our regional staff are.” These comment demonstrates how reflexive behaviors have helped develop the relationship between the levels of the organization. However and alternately, there is still the underlying hierarchical expectations present that drive the organization. “Most importantly, to be successful within our HR and Operations expectation is to communicate through the supervisory chain.” Also, comments like the following demonstrate the expectations of the national office and the lack of resource dependency in the area of operations. “They have to follow our rules and do it like we ask them to do it or they don’t get their money back.”

Senior executives note that there are ways to be successful in the operations and it does not
include behaviors that are reflexive or resource dependent between the field staff and the national office. The national office does not create operational policy that recognizes the infrastructure design of each office, given their local conditions. Operations compliance is tracked through “making sure inventory is balanced yearly, expense charges are signed off and approved every week, there are some [policies] that are ‘how I need to work and play’ and others are the numbers.” Other measures of Operations tracking included handling “banquet money coming in, how they handle their own expense accounting, how they handle banquet fundraising, event fundraising, and record keeping.” “There are 9 competencies that get rated. We define them.” Accounting tracks many of the policies in place for the paperwork and finances. “They hear from who they report to, but this is a pretty loose system.”

**Trainings Needs/Interest**

Trainings are becoming an issue, a revised way to bring new information and skills seems to be on the minds of the leadership team, across the board. “Part of designing the future of this organization is having really good staff and train them appropriately…we are lacking in a lot of structure that you normally find in an organization this size and we are trying to build as we move forward.” A remark regarding website training said that “we need an opportunity to show people, if they realize [the website] is so much cleaner now and updated. The feedback loop is such that the senior team is not hearing from the field, regarding a need for training. “If we heard from the field that [they] really want training…I think there are other things that we are trying to get through…” Across all six senior executive interviews a consistent understanding of training was shared. There are regional meetings, national meetings, “twice a year and that is where information or procedures are presented.” “They will get [training] via quarterly meetings…but there are also staff meetings that we either videotape or twice a year when we get together, we will
Training needs/interest hypothesis. One hypothesis was evaluated based on training needs and interest perceptions within the organization. (RES DEP) $H_0$: National office provides training to local offices for appropriate operational capacity so that the local office is aligned with the national operational expectations.

According to the responses there is an understood deficiency in the area of training and development of staff. This hypothesis is understood through the resource dependency model. If national provided/required training opportunities they would be providing skills needed for the regional teams to produce higher output/outcomes for the national mission. The national office does not provide training to the local offices for appropriate operational capacity so that the field staff are aligned with the national operational expectations. Instead the regional staff lack alignment due to limited growth opportunities to develop skills that enhance behaviors to perform to the expectations of the national office.

Onboarding is important to long-term achievement however, “we have these people we want to be highly creative, highly engaged, carry our mission forward, and some didn’t get [to the national office] for over a year. They didn’t understand the overall mission, history of the organization. Didn’t have access to all of the policies and procedures. We have started to implement onboarding where we bring people in and do some training…it is still an area where we are weak.” Many noted that the organization lacks a system of training so as it is presented 2-3 times a year staff are unsure of its importance. “Training is not our strong suit. There are some basic administrative topics like Access… [also] business writing, conflict management, empowerment, volunteers, and basic oral communication.”
**PR/ External Communication Standards and Expectations**

Public Relations falls under the direction of the Communications department. There is a team of approximately 15 people manage the brand standards, media delivery; such as the television shows, magazines and publications, graphic services (brochures and banners) as well as the website, social media and public relations. “About a year and a half ago [we] produced brand standard guidelines. I don’t want them taking liberties with the brand…We are very service based…especially for the regional directors.”

**PR/External Communication Expectations**

“The biggest expectation is for us to see what those people put out in the local offices or out in the field and under that they are part of a national organization.” There are tools in place that the national office have created to help the field staff with messaging. “They [field staff] will call and say ‘I can’t find X’. Use the resource library ‘What’s the resource library?’.” One interviewee suggested that, on a 1-5 scale, as an organization the perception of regional success in public relations efforts was ranked at a 2.

**PR/ External Communication Tracked and Communicated**

The regional teams are not asked to meet expectations in social media efforts and while “we can track social media hits, we can track website hits…it is not telling you that your message is being heard consistently…They can post whatever they like. We monitor it.” While tools seem to be available the regional teams may not realize how to best use them. The one example a senior executive shared that might demonstrate alignment in public relations efforts at the local level was regarding a question about tracking website and specific video/document usage by the local offices. “We cannot track that.” The national office does not actually know if the communication message is being used at the regional level. “When the message becomes ‘this is a message from
our organization’ then we will know we are making progress.”

Additionally, field staff are engaged in creating stories and messages from their local work. “There are actual assignments that go out with deadlines to write articles…It is a part of their performance objectives. It is an area where if we haven’t heard from you and you haven’t fulfilled any part in that you’re going to get graded down on that.”

**PR/external communication tracked and communicated hypotheses.** Two hypotheses were evaluated based on how external communication expectations are tracked, which include:

**(RES DEP) H₀** Regional offices follow the communication message of the national office by disseminating the mission-centric message via local media relations.

**(RES DEP) H₀** National office consults regional teams for perspective on media communications that are most appropriate for the individual need.

“We realize that media relations, public relations, all that has to happen at the local level. We can’t do that for everyone across the country.” The regions have not all fallen in line with the brand and guidelines. “We still have chapters out there that have very localized identities…they feel like they are doing their own thing. We pick our battles.” The public relations efforts at the regional level are enforced through repetition. “We repeat why we do what we do.” Many of the respondents identified that national’s expectations for public relations are hard to track and the organization doesn’t “have solid information to communicate to them and what we expect them to say.” National office hasn’t provided a clear expectation. However, one respondent noted that headquarters must “be a lead on [the communication] because we have expectations…that certain things need to get done.” This begs the question, Are the PR expectations understood across the leadership team and how then are those being communicated to the field staff?
“Selling the Mission”

National’s responsibility to communicate the mission is “more reactive …than proactive and tends to be…fluff in substance. Communication is not targeted as it should be, regionally or our mission delivery.” Selling the mission is beyond the work but also honoring the agreements each department are entering into, having a way to track those promises and demonstrating the commitment. One respondent stated, “…that is one area where we have been weak. Where we have individuals who sign agreements with sponsors and that information has not always been well-communicated across the organization and then we fail to honor those. So, it is still a work in progress.” There were multiple efforts and ideas each interviewee described to better define and communicate public relations efforts throughout the organization. For example, a wish list of communication tools was described. “I would like to see a toolbox of elevator speeches, not just what does Save the Habitat, Save the Hunt mean” but what does that mean in specific areas or trends in each of the states or “how is NWTF making a difference in moving the needle?” One comment resonated, “We are good at reporting but we are not good at leading the communication. Communication of local mission delivery is weak. Unfortunately, we tend to communicate as a news service as opposed to an organization that’s leading volunteers.” Successful external communication efforts “will become when they really are champions of our story and it’s the same story whether I tell it, or the guy in California tells it.” The organization needs field staff to share the mission and “really have it come alive for volunteers and donors so that we can do fundraising around it and we can have more people invest in it.” Field staff are the faces of the organization. The regional team of directors and biologists bring the mission to the masses. “[The RD’s] get frustrated sometimes because they don’t know how the mission applies.” In response to that understanding, a separate interviewee noted, “We’re trying. We’re encouraging them. We give
them a world of information…some are good at it, some not so.” The interviewee ended by noting
the external communication expectations of the field staff are not clear and something they are not
being held accountable for.

*Selling the mission* hypothesis. One hypothesis was evaluated based on “selling the
mission”. A cohesive public relations effort provides for a complete approach to brand
promotion and mission awareness. RDT helps to support this hypothesis by recognizing the
strength in the dual approach of “selling the mission”.

(RES DEP) H₀: The purposes of the regional and national offices are clearly understood to rely
on both offices to develop and increase awareness through mission-centric communication.

Maintaining the message that resonates to multiple levels and creating outlets that are
receptive to the message can be priorities of both levels within the organization. Responses from
Phase 1 noted, “We have a general philosophy on communication…we built tools, we built a
brand, we have the message, but it is only as good as those who are delivering it. We can only
reach so far from here.” “They are expected to use of what we provide and offer feedback on
how we can develop tools for them.” “We need to look for opportunities where there needs to be
communication. Our local biologist, we ask them to write some of the articles [for the
magazine], to identify where we have great examples where we can highlight some of their work
in their area….So, I think it is about helping us tell our story nationally by using local examples.”

“Most of the awareness, on the broad level originates here with the magazine, the television
shows, and the social media. So, I don’t think the regional offices have the resources to do a lot
on the brand.” “We produce magazines and we want news items from local office. We want
pictures showing that there are things in the field so we expect some reciprocation to fully tell
our story.” These responses begin to illustrate a sense of resource dependency, however there is
limited acknowledgement of a needs assessment for branding needs in the communities the NWTF strives to saturate and serve. Therefore, producing mission-centric messaging without recognizing whom you are dependent on for distribution may not be a cohesive approach to PR/external communications.

**Phase 2: Regional Leader and Direct Report Email Questionnaire**

Phase 2 participants were selected as a sample of the management team and regional leadership team, across the country. These 13 participants were chosen by the CEO to gain a middle leadership perception of alignment indicators and shared understanding of what is expected in each variable. Phase 2 was developed to continue to inform the 6 research questions:

1. How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables?
2. To what extent do regional offices/field staff believe their local office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.?
3. Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided?
4. To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance?
5. What mechanisms are in place for the national office to evaluate regional sites and what is evaluated?
6. What are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the
alignment indicators?

A single phase of the research can’t answer these questions alone. Instead this research employs multiple organizational perspective to develop a definition and understanding of the organizational perceptions from across the hierarchy. This helps to inform these questions to determine alignment between regional behaviors and national expectations.

Eleven of the thirteen participants responded to the questionnaire designed to illustrate shared understanding or lack thereof of the messages being disseminated from the senior executive team through the hierarchy of the organization. These thirteen staff were identified as key direct reports to be included in phase 2 of data collection.

A questionnaire was distributed to these 13. Two staff did not respond to the request, one of the 13 asked to complete the questionnaire via teleconference and two of the respondents were able to answer the questions in face-to-face interviews, as the schedules allowed, the additional 8 completed the email questionnaire. All interviewees answered questions focusing on the same topics from phase 1 interviews. Each were asked to consider the variables as it relates to their role, knowledge of the organization, and perceptions of expectations and alignment. All interviews were transcribed, entered, and coded using the Dedoose software. The response rate was 85% for Phase 2 of the data collection.

Six headings of data were collected: the five variables, as well as an initial discussion with each direct report, identifying perceptions and understanding of basic organizational design components. The phase 2 interviews gathered insights of the general perception of the organization’s design in addition to the five variables used to define and measure alignment. Additional headings include: Information dissemination, field staff freedom, and the overarching response to “Is alignment a concern?” These data will inform the researcher on clarity of
messaging, perceived value of national directives at the local level, and training and evaluation tools, needs, and perceptions.

The core questions that framed Phase 2 data collection were:

1. Are success measurements clearly defined (in each variable)?
2. Are success measurements clearly communicated (in each variable)?
3. What training does staff receive (in each variable)?
4. What is your overall feeling of success (in each variable)?

During the analysis of Phase 2 data the most expected findings were: (a) lack of clarity in messaging (b) lack of training and (c) a respect for the organization changing and growing. Additionally, there were unexpected discoveries. The most prominent was mid-level management’s strong desire for more training as well as a desire to want to know what success is. It appeared as though many responses suggested that they could do better if the metrics were clear and stable.

**Organizational/Framework Findings**

**Informational dissemination.** “I’d generally characterize the sharing of information outside of the department as poor. The organization has had a bad habit of sending some information only to field staff, and other information only to HQ, when both groups would benefit from the knowledge. Through peers we typically find out second-hand.” Another shared, “There is no iron-clad conduit that reaches me that I am always going to hear something that way.” Lastly, “We do not have a regular set-up for dissemination of material from the management team say to mid-level management. That comes only back to us from [our direct supervisor].

**Frequency, mode, and clarity of communication.** “Regional staff receives intel from NHQ…at quarterly meetings and bi-annual staff meetings.” In addition, one respondent noted that
“Quarterly updates are often used, but engagement from staff is typically poor. It’s a report of numbers, budget, etc. which is important, but does not typically focus on the ‘WHY’ of our organization.” While the consistency of information dissemination may not be as clear the modes of communication seemed plentiful. Many staff mentioned multiple conduits for the information. Most commonly recognized were: email, phone calls, web-ex, conference calls, some in-person meetings, and the intranet. The frequency and mode of communication seems to be agreed upon within the 11 respondents in phase 2. Additionally, some comments regarding the clarity of the communication presented themselves in the narratives. “For my department, goals are somewhat set.” “Recently we have started using the chain of command for the dissemination of information. Generally, I think this has improved communication, but in some cases, not all relevant info does get passed on.”

**Field staff freedom.** As expected in a corporate model nonprofit, the decision making authority is maintained at the board of directors and the CEO has primary organizational leadership. The hierarchy is “Top level teamwork to funnel down.” A majority of the decisions are made by the senior executive team in Edgefield, SC. “Much of [the authority] remains at the HQ senior executive team although significant authority has been delegated to field leadership, recently.” In response to the organizational structure and communication one interviewee shared, “the organization has made much progress…toward a more decentralized model as it relates to both supervision and authority.” It seems that due to this recent shift in organizational empowerment the “associated level of trust is currently much greater…”

Many direct reports noted that they feel empowered to do their work, they have been given the responsibility to “make decisions regarding the day to day management of [the] region and staff.” As mid-level leadership within the organization it is also each manager’s responsibility to
guide additional field staff. In doing so, one respondent shared, “I try to encourage ownership at the local level as long as it is within the sideboards of our organizational mission and long-term objectives.” Another said, “You have to give them enough flexibility to be creative so they can do their job…but you also have to give them the framework…that there are rules. As long as we are all playing by the same rules.”

Is Alignment a Concern?

Most respondents spoke in terms of their perceptions of how volunteers feel about alignment and messaging. This approach is understood because the field staff have a direct connection to the local volunteers and ultimately have to respond to the concerns of the volunteers. It can be argued that if the volunteers are confused or misaligned it is, in fact, because the regional staff are lacking the message or understanding to communicate alignment messages to the volunteers. Creating the seamless messaging model of all alignment-specific behavior and measurements allows for a shared understanding of expectations throughout the organization. One respondent said “At times there is confusion in the field when new national-based programs are developed and they aren’t clearly communicated to field staff or do not have buy-in and input from the field. On the other hand, it is part of my responsibility (and all field staff) to make sure that our local programs align with the national vision and direction.”

Overall, when asked “Do you believe regional and local alignment with national is a concern?” the answer was “yes”. There were multiple iterations of this. For example, “Yes…[Regional] are either not sharing their successes so we can report on them or they are unaware of the current initiatives and goals and their perceived concerns lie outside of those goals.” Another said, “I see disparity in some areas.” One respondent said, “Yes…I still feel that we struggle when it comes to local alignment…per national goals and objectives.” Additionally, “I don’t believe we
have done a good enough job…establishing expectations at the local level…to help achieve our national goals and objectives.”

Perception is the reality of each regional site and the field staff within the organization. A shared understanding of expectations is visible when expectations can be retold and responded to, demonstrating organizational consistency. A respondent said, “I believe [we are aligned] for the overarching/umbrella objectives of the organization.” This is a testament to the shared commitment to the organization but not a recognition of shared understanding of the expectations of the alignment indicators.

**Fundraising Expectations and Understanding**

The overarching theme for the development expectations and perceptions during Phase 2 was that soliciting and securing funds is everyone’s job. Without the resources the mission cannot exist and therefore it is in every job function’s best interest to support the role of fund development. One respondent’s noted that their perception of their role in fundraising, although not their job function is that there is “an expectation for assistance to the fundraisers as necessary.”

“I think we are improving on our entry level donors” and “I believe we are successful locally cultivating and maintain donors.” Comments like these resonated through the Phase 2 dialogue and capture the strength the regional relationships and local volunteer efforts to create giving opportunities. How to grow those entry gifts and develop a philanthropic culture at the NWTF is still limited. The national office seeks to transition entry level donors into major gifts and throughout this research it is noted that there is limited training and conceptual buy-in to the behaviors that meet those national expectations.
Fundraising Expectations and Communication

Goals and metrics provide clarity to the target number however the responses to understanding the expectations and how those expectations are communicated to the regional staff indicate that the goals may lack realistic measure and often do not take into account the local conditions. “…Sometimes it [fundraising goals] appears to be a moving target.” The comments about fundraising expectations centered on national having a good understanding of the regional/local climate. “…expectations are not always viewed from a real-world perspective.” Also, “I feel that success measurements are most often clearly defined at the national headquarter level but may not always be communicated across all levels of the organization….evaluation performance does seem to be black and white with regards to fundraising expectations.” Having these clear expectations supports the alignment behaviors the organization can identify. However, if there is vague or inconsistent communication about the goal, the metric, the measurement, and/or the accepted behaviors that demonstrate alignment than the regional offices seem to feel uninformed and unable to meet the demands of the national expectation.

Fundraising expectations hypothesis. Using reflexivity theory one hypothesis was evaluated based on fundraising expectations. This theory promotes organic conversations about fundraising goals and clarity of expectations would be a better way to understand and disseminate the expectation information. Using the mechanistic forms of hierarchical conversation the national office limits its ability to recognize the specificities of the regional capacity in fundraising and therefore may struggle to meet the expectations of fundraising; not only on goal attainment but also in performing the behaviors that national expects to create fund generation opportunities.
(REFLEX) $H_0$: National offices recognize the varying needs for communication effectiveness and how that communication impacts local offices’ understanding of purpose and direction to better align with fundraising goals.

If the national office used a reflexive practice to generate a dual-understanding of both levels needs and abilities the regional team may be able to align in a purposeful way and create additional opportunities that are suitable for the local community, instead of responding only to the fundraising models that are required by the national office. According to the Chapter Manual (2016) “Anyone wishing to further the mission of the NWTF and form an NWTF charter and affiliated chapter must accomplish the following: …Conduct and finalize an annual NWTF Hunting Heritage Banquet…” This is a required fundraising event and the only mandated fund development regional opportunity to raise funds.

**Perceived Regional Fundraising Success**

Despite having limited training opportunities, according to the mid-level management team, many still believe the regions are successful in driving dollars into the organization and raising funds through campaign efforts. Respondents offered statements like, “I believe we are successful locally cultivating and maintaining donors.” “I feel as though we hit success goals pretty routinely.” And “I think our local success is strong.” The caveat to some of the success comments was having the right tracking tools to identify those successes. “…but we may not have the associated metrics established at the local level to truly define or to help drive behavior.” Also, some respondents mentioned the fundraising team is “stretched and often behind.” “I think we are improving on entry level donors, but don’t think we are doing well at all on large giving donors.”

**Fundraising success perception hypothesis.** A single hypothesis was evaluated based
on perceptions of fundraising success.

(RES DEP) $H_0$: The purposes of the local and national offices are clearly understood to rely on both offices to raise funds through mission-centric donor involvement.

Resource Dependency can help the research understand the national and regional relationship within the fundraising indicator. This hypothesis demonstrates the reliance on both parts of the organizational infrastructure (national/regional). Through the Phase 2 responses it has been demonstrated that the expectations, measurements, and understanding of success in fundraising behaviors and outcomes appears to be one-sided. These measurements are perceived as top-down decisions. Additionally, the needs of the regional team to create alignment can be addressed through training opportunities, supported/offered at the national level. However, this is lacking and remains a need at the regional level, in order to understand and create the alignment behaviors the senior executive team indicated in Phase 1. Both entities are dependent on the other to generate successful outcomes within the fundraising indicator.

**Mission Delivery Expectations and Understanding**

The mid-level management that directly reports to a senior executive were asked about their perception and understanding of mission delivery expectations, communication, training and feelings of regional mission delivery success. A majority of the responses were supportive of mission success, training seemed to be limited, and the expectations appear to be understood through program connection to the flagship vision of the organization. “Save the Habitat, Save the Hunt.”

**Mission Delivery Expectations and Communication**

Programs, outreach, and mission-specific activities vary across the country depending on
the geography, demographic, and culture of the region. That could allow for mission drift or lack of focus on the intended organizational outcomes. However, through the Phase 2 responses from the mid-level management team, where mission directives could appear misconstrued as they trickle down the hierarchy, there was overwhelming support for the “Save the Habitat, Save the Hunt” initiative and how that new direction provides direction for mission delivery as a variable for alignment across the organization. “I believe mission delivery goals/objectives are clearly defined via our Save the Habitat, Save the Hunt initiative at the national level and how it tiers down to the state/local levels.” The same respondent did follow up by adding, “I feel we do fall short sometimes in how this is communicated…” Additionally, while mission delivery metrics are in place via the national leadership team “these measures have not been formally stepped down to regional, state, or individual objectives. Our strategic vision outlines what they are, but at this point are not specific enough to define metrics on an annual basis.” Multiple respondents felt that the mission delivery goals are housed through the “Save the Habitat, Save the Hunt” initiative and any communication of those goals comes through a shared understanding of that organization-wide commitment. When asked about that communication of mission delivery expectations one responded with there is “not much when it comes to mission delivery, but we do get opportunities for leadership training which helps us all achieve our mission.”

**Mission delivery expectations hypotheses.** Using reflexivity theory to understand this mission delivery expectations hypotheses, Phase 2 respondents appeared to believe that mission delivery is strong but lacked a formal relationship with the regional teams. Resource dependency allows us to better understand the importance of mission delivery work that is responsive to the local condition. Two hypotheses were evaluated based on mission delivery expectation perceptions.
(REFLEX) $H_0$: Regional offices understand the expectations of mission delivery designed by the national office and are able to develop infrastructures that fit the needs of the community for effective mission delivery.

(RES DEP/REFLEX) $H_0$: Regional offices understanding of mission delivery models and expectations allow for greater reflexivity in creating opportunities that align with national expectations and goals.

Reflexivity would suggest that the mission initiative, Save the Habitat, Save the Hunt includes behaviors, measurements, and outcomes that are broad for the organization but also guided each regional team, specifically. To do this discussions may include efforts to understand the programs that are critical to the organization for mission delivery and cross-reference those national efforts to the capacity at the regional level. Thinking about how to create and invest in meaningful mission work that is relevant to the national initiative but responds to the local conditions requires reflexive behaviors and responsive dialogue between levels of the organization.

Through this evaluation, using RDT, it is demonstrated that the shared commitment to the Save the Habitat, Save the Hunt initiative is present but the shared understanding of how to engage in that initiative at the regional level in a meaningful and approved way is lacking. Mission work can be broadly defined so understanding what the program opportunities are, provided and supported by national, and conversely understanding what capacity the regional teams have to produce the mission metrics. The regional office needs national approval of mission-specific work to ensure organizational trust and brand promise. However, as RDT suggests the power struggle emerges because national needs the regional teams engaging and impacting the mission. Therefore, RDT would support creating opportunities that are based in
the same shared commitment to the “Save the Habitat, Save the Hunt” initiative, as well as grounding those mission-centric opportunities in a shared understanding of the behaviors, measurements, and outputs that help to demonstrate mission alignment across the organization.

Mission Delivery Training and Tracking

Consistent with the above variables as it relates to training throughout the organization, mission delivery is no different. Respondents noted things like, there is “nothing formal outside of new staff training/on-boarding. In many cases, necessary training, knowledge, etc. as it relates to mission delivery is coming with the individual upon hire.” Training in the mission delivery capacity has had “mixed success”. These types of trainings “often seem to be ‘one and done’, and are not reinforced as the new way that we want to do business.” There was one response that was more optimistic about trainings suggesting that the trainings are focused opportunities that are happening on a smaller level. Training “depends on the objective. Staff training has been provided about things like mentored hunting.” However, the same respondent noted that some national metrics on mission deliverables “is based on application of science and building partnerships… We emphasize partnerships but don’t have a formal training on how to build them.”

Tracking mission deliverables is done through reporting forms that have been designed to specifically match the “Save the Habitat, Save the Hunt” initiative. These “strategic goals…will help us to track progress.” A respondent suggested that they understand the mission alignment tracking to happen through “a monthly dashboard to measure our success.” This dashboard is an organization-wide tool that communicates how the cumulative efforts are moving the needle toward success measures.

Perceived Regional Mission Delivery Success

The majority of the 11 responses in Phase 2 supported the field staff and indicate there was
a high level of perceived regional success in mission delivery. However, that is not without some contradiction within the same responses. For example, statements like, “We have gotten much better”, “I think we do a good job of delivering on the mission…We have the structure to deliver at a greater level…” “[We are] really knocking it out of the park…but struggle with report for accomplishments” were shared to explain the regional behaviors. Responses like these demonstrate a shared commitment to the mission but also illustrate the lack of confidence and/or consistency in how to measure this alignment variable. Leaving the direct reports to wonder how to best capture the work the regional teams are doing that, from their perspective, produce mission-centric outcomes but are not tracked or recognized as specific deliverables. Of the 9 responses that were transcribed and coded as “mission delivery regional success” one indicated without contradiction that regional mission delivery success is “excellent.” “If it can’t be tied to the mission, it’s not a project we engage in.” This type of understanding on mission work is critical to the mission delivery alignment. Creating a specific shared understanding of exactly what can be considered mission delivery and acceptable programmatic work at the regional/local levels.

**Volunteer/Community Engagement Expectations and Understanding**

The National Wild Turkey Federation, like many multi-site national nonprofits have a significant volunteer database. At the NWTF volunteers are a critical part of the organizations infrastructure and success model. The organization relies heavily on the generosity of the community volunteers that give, not only of their dollars through fundraising, but also choose to give of their time and talents. Because of this dependency on a strong volunteer model there is a significant component of the work that each region is accountable for that happens at the hands of the volunteers. Therefore, volunteer and community engagement behaviors and expectations
as is relates to volunteer direction and recruitment is an obvious variable in this research, as we seek to understand alignment of the national expectations to the regional/local understanding, behaviors, and outcomes.

**Volunteer/Community Engagement Expectations, Communication, and Tracking**

The first challenge participants had with this variable was defining a *volunteer* from a *member* of the organization. Members are a database of supporters that spend minimum $35.00 on an annual membership. Volunteers, while typically members as well, are often the group of constituents that give of their time and talents to progress the organization outside of donor relations.

During Phase 2 of the interviews many respondents noted that the expectations of the regional staff regarding attracting, recruiting, securing, training, and utilizing volunteers were vague. For example, “We do not have a true baseline of volunteers, only a guess, without a baseline it is difficult to set realistic expectation.” Another stated, “Parts of it [volunteer engagement] are widely understood, but there is not a concrete system. There is a lot of different interaction between staff and volunteers.” While the national office has strong feelings about the regional team’s ability to engage within the community (as demonstrated in Phase 1 data) the directives seem to be less standardized and inconsistent across the departments within the organization. “National goals/success measurements often tend to be clearly defined but some of the definition appears to get lost when it trickles down to both the state and local level in regards to volunteers and implementation.” The idea of creating systems for volunteer engagement is still a work in progress. “There is no budget [to recruit volunteers]. We just know that recruiting new volunteers equals more dollars raised.” One respondent commented that the organization still lacks a process to bridge the national message to the volunteer needs and value. There is “poor
messaging in connecting the dots in regards to the role of the volunteer and their overall fit in mission delivery.”

**Volunteer/Community Engagement Training**

Overall opinions of the respondents when asked about training included: There is “nothing formal outside of new staff training, which may vary between [departments].” “Currently, training is limited, as it pertains to volunteers, within the conservation ranks.” One respondent from the Operations team stated, “There is no training provided.” And lastly, there is “minimal [training]. Some talk about the mission, strategic vision, initiative, but not really how to apply it.” Of the five responses coded to this category, one said, “We have in-house training showing best ways to recruit and retain volunteers and the importance there of.” These responses demonstrate a lack of clarity and consistency in the message of how to cultivate volunteer relations and grow the engagement model. It seems that many recognize that the volunteer system provides value and is a pinnacle point of the organization’s work, however there is limited time and effort devoted to communicating and building a shared understanding of how to align with national’s expectations of volunteer/community engagement.

**Perceived Regional Volunteer/Community Engagement Success**

The responses from the direct report management respondents in Phase 2 varied when asked, “What is your perception of regional success in the area of volunteer/community engagement?” While training is lacking, budget for recruiting and cultivating is limited, and understanding what message national wants the community to have as individuals grow into their volunteer role is unclear to the field staff the feeling of success was mixed from these managers. They offered comments such as, “I feel that ‘Save the Habitat, Save the Hunt’ has generated some new excitement and has led to much better local success.” “It is good, everyone will always want
to see more.” In contrast, comments such as, “We need more local involvement.” “Our field staff tell us [volunteer engagement] is a high priority for improvement. This tells me that success is poor.” “Volunteer cultivation, success is quite limited.” One respondent connected the difference between the fundraising/banquet model and volunteers for the local offices. “We’re pretty successful in recruiting banquet attendees (selling banquet tickets), but recruiting chapter volunteer is more difficult.” Lastly, and not uncommon to many nonprofits, a respondent shared, “We have the same volunteers for many years and it appears that many suffer from burnout.”

Volunteer engagement success perception hypothesis. One hypothesis was evaluated based on volunteer success perceptions. Using both, RDT and Reflexivity frameworks the volunteer policy perceptions were reviewed to understand flexibility and needs at the regional level compared to the directive from the national office.

(RES DEP/REFLEX) H₀: National office creates volunteer policy that fits the infrastructure design of each local office, given their local conditions.

Using the data collected in Phase 2, there are multiple responses that seem to argue the above hypothesis. While RDT and Reflexivity Theory can be used to generate an understanding of why the hypothesis would be true, the NWTF does not seem to maximize their opportunities to recruit and develop local volunteers or stifles the regional team by limiting training and not generating clear communication and expectations of approved working volunteer models. Instead the field staff are left to design recruitment strategies that will “get the job done” but may not be centered on the mission messaging that national so desires. Therefore, it is illustrated through this phase of data collection that the volunteer/community engagement indicator lacks alignment from the Phase 2 participant’s perception.
HR/ Operational Expectations and Understanding

The mid-level management team is responsible for the implementation and support of many of the policies and procedures that are directed by the national office. An unexpected finding was the positive response to the forward movement of the HR team. Most respondents were satisfied with the onboarding of a new HR director. Comments like “[HR is] much better than in the past… [We have] a hands on HR manager who has good ideas” suggest the acceptance of new leadership in the area of HR/Operations and a willingness to develop that area of the infrastructure. One respondent suggested that the needs for an HR team is a welcomed change. They said, “[we need] the HR department and strong director to assist staff and bring about greater standardization/consistency with regards to process.” Also, the shift the organization is taking to alleviate many burdensome tasks that will reduce the reporting function of the field teams offers a refreshing change to the field teams. However, the topic of trainings and lack thereof was consistent throughout the interviews as a gap in the organization’s ability to function with high-impact as well as clarity of expectations.

HR/Operational Expectations and Communication

The operations expectations range from policies, safety regulations, procedural efforts, and reporting needs. The responses were varied and inconsistent. The participants did not demonstrate a seamless understanding of the HR/Operations expectations. For example, when asked “Are success measurements clearly defined and communicated from national for human resources?” Responses ranged from: “No”, “Not really”, “I’m not aware of the specific goals/measurements”, and conversely “Yes, any HR needs are provided to us in writing with timelines.” And “for the most part, yes.”
The direct reports continued by demonstrating a basic understanding of the HR function at the national level. They supported this by noting “[HR gives] some guidance and administrative support for hiring, employee evaluation, and HR issues. Much of this is still handled in the field.” In regards to expectations and tracking those metrics of success there was not a lot of specific information aside from a comment about the HR team providing annual performance evaluation tools/systems for staff.

**HR/Operational Training**

Minimally, Phase 2 participants acknowledged that onboarding is a required training function of the operations team, in conjunction with supervisors. However, many shared comments that echoed “onboarding is sporadic…” This mirrors the feedback from the senior executive team regarding onboarding procedures and a need to find a more consistent way to inculcate new staff. “[There are] little to no training on hiring procedures, performance evaluations, Performance Improvement Plans, appropriate discipline, etc.” The mid-level leadership team seems to have “various training opportunities (some selective/some open to all staff) to include leadership development.” One noted that safety training is important. When specifically asked “What resources does national provide for HR success?” One answer was “Just emails regarding areas to be aware of; such as how to carry heavy items, etc.”

A consistent message across the eleven responses are illustrated in one respondents quote. “We recognize that there are gaps in our onboarding and staff development…we are working on it, but we are not where we want to be.”

**HR training perception hypothesis.** Using these responses in Phase 2 to illustrate an understanding, one hypothesis can be assessed.
(RES DEP) $H_0$: National office provides training to local offices for appropriate operational capacity so that the local office is aligned with the national operational expectations.

Based on these data, from Phase 1 and Phase 2, I would suggest that to create shared understanding and alignment behaviors it is the responsibility of the HR/Operations team to create development opportunities and define a culture of behaviors and expectations that resonates throughout the organization. Many seem open to the direction but lacking the national leadership. “Onboarding/staff development is an area for which we definitely need additional improvement, both at the national and field level to ensure new employees are given the tools and knowledge to succeed.”

We can use resource dependency theory to illustrate the importance of the trainings and staff development. Trainings are not specific to the position. “[Onboarding] agenda is inconsistent, and likely not tailored well to individual positions- everyone gets the same regardless of relevance to their job….Training is left up to line supervisors- so training depends on what they know and their schedule.” However, if teams are trained and increase their knowledge of the specific job-relevant expectations then those teams can demonstrate a shared understanding of national’s expectations of behaviors, metrics, and outputs. If the teams are not a part of consistent training and development they cannot have a shared understanding of national’s expectations and therefore cannot perform to the levels senior management may assume to be normal.

**Perceived Regional HR/Operational Success**

When asked what had to be done to be successful in the area of HR a participant stated “follow the rules…there is a chapter manual.” Another indicated they were successful in HR/Operations expectations because they are “very proactive via the HR process and keeping in
close communication with our HR Director.” This indicates that the HR expectations are loosely designed and make it more challenging for managers to know and understand what defines success and therefore may result in a lack of behaviors that demonstrate a shared understanding of success, between national and the field staff. The comprehensive take-away regarding alignment of HR/Operations behaviors is to “follow the rules” and ask questions.

**HR/operations success hypothesis.** The mid-level management level is dependent on strong policies to guide the behaviors of their teams. If they are given the training, policies, and authority to enforce such clear expectations they can then begin to change the culture of uncertainty. Thus, building a shared understanding of organizational operating norms that are aligned with the HR/Operations senior executive team expectations. One hypothesis is evaluated based on the operations policies created at the national level.

(RES DEP/REFLEX) H0: National office creates operational policy that recognizes the structure design of each local office, given their local conditions.

Policy is not created to understand each location or staff member. The data suggests that the NWTF creates rules for the organization to abide by. The development of those baseline policies are generated at the national level and filtered down to the regional staff and further to the volunteer teams at the local level. The creation and implementation of the performance evaluations, chapter manual policies, and the like do not vary based on local conditions. Thus the reflexivity of the HR requirements is low. Without a deeper buy-in and dialogue to inform hierarchical decisions there is limited reflexivity that would adjust policies to reflect suggested behaviors and conditions specific to each staff. The argument is not the HR/Operations should be reflexive on each expectation, instead it is to recognize that by including a more reflexive
decision-making process the policies may be designed in a way that the regions are clearer and understand the expectations.

**PR/External Communication Expectations and Understanding**

Consistent with Phase 1 data, many respondents demonstrated uncertainty with the communications plan, public relations efforts, and how to use approved messaging from the national organization. Phase 2 respondents shared their perceptions of what national expectations are and the clarity of understanding regarding those expectations. Additionally, training, the perceived value of “selling the mission”, and the regional success in PR/Communications perceptions are captured. During data collection the PR/Communication indicator crossed with multiple indicators. While discussing other variable perceptions the need for external communication was consistently noted. For example, in fundraising, it is “a bit of a challenge…to educate the general public and some partners, and receive a positive response about the work that we are doing… [We have] limited membership and brand recognition [in some areas].” External communication is critical for brand awareness, mission messaging, generating new interest, and “selling the mission.” Developing talking points that drive members, donors, and volunteers to the organization make the mission pitch clearer and consistent across the organization. The external communication indicator or success is a strong component of success for the other variables, as discussed.

When questions about strategies used by the organization to “sell the mission” one respondent noted that the “Communications department has sound bites, etc. for TV, radio, magazine- any/all PR outlets, both internal and external.” When asked about using the mission as a part of the volunteer recruitment and donor cultivation many respondents turned to the
institutionalized outlets that the communications team is responsible for. “We certainly have worked on our communications for several years. We have 2 magazines now, three TV shows, various other outlets for news releases.” “We are updated on programs we air and our various social media.”

**PR/External Communications Expectations, Communication, and Tracking**

Providing clarity of expectations for this type of communication is vital to the brand, across the country. Understanding what to say, how to say it, and where to say it gives the regional teams direction. It empowers them to be the voice of the organization in a way that is supported by the national organization. There is a lack of understanding of what national wants from the regional staff, by way of PR/Communication. When asked about the expectations set forth by the national team regarding this alignment indicator responses included, there are no measurement that are clearly defined or communicated. One noted that very little time is devoted to external communications, in the field. Additionally, one perception/understanding is that the expectation from national is to “get the word out as much as we can, wherever we can.” This may be true, but was never identified during Phase 1 as a part of the communications strategy or call to action for the regional team. That comment epitomizes the over simplification that seems to be happening at the local level due to a lack of shared understanding of expectations measurements for success to indicate alignment. Instead of getting direction, best practices, or a clear message from national on how to use external communications one respondent stated, “We get some of that. I don’t think it is widespread, timely, or effective enough at this point.”

**PR/External Communications Training**

The NWTF has thousands of volunteers, chapters, and field staff. This network of passionate stakeholders has the ability to cast a net wide and far for new interest and mission-
specific awareness. However, to do this the communication strategy should include external communications training. Having the brand knowledge and relevant mission and/or event specific talking points empowers the countless voices a communication plan can create. However, when asked about training opportunities in the area of PR/external communications most noted things like: “I have not received any additional training beyond work experience for PR or external communications.” “I attend outside training through conferences, etc.” Respondents from outside the Communications team noted that there was very little training in how to use the communication tools. “We do not receive training in these areas...” “Not aware of training on how to craft a message, how to get it picked up by the media, how to effectively use social media.”

**External communication training hypothesis.** Perceptions from the direct report responses in Phase 2 regarding the PR/External communications expectations from national were reviewed and resource dependency theory helps to understand where there are limitations within the organization structure to generate a shared understanding of this variable. A single hypothesis was evaluated based on external communication training needs.

(RES DEP) H₀: The purposes of the local and national offices are clearly understood to rely on both offices to develop and increase awareness through mission-centric communication.

RDT explains the importance of valuing both levels of the organization and appreciating the power that each has. However, it seems to be a miscommunication of expectation and how to succeed. Without a training plan and a well-disseminated communication strategy the field staff seem to be ill-prepared to work the communication plan, as the national team is expecting.

**Perceived Regional PR/External Communications Success**

“‘Telling our story’ continues to be one of the greatest challenges we face as an organization... we are still struggling to hit the mark with the masses.” “We need a well-thought-
out, effective plan…” Overall, there was some disconnect between perceptions. Many responses were supportive of the local work that was being done it was clear they felt like that success was in spite of the lack of a nationally-implemented communication plan. When asked specifically about using key talking points responses included: “Most of us have defined our own ‘elevator speeches’ to fit the territory we cover.” “I think many staff have their own version. I am not aware of a standard version.” As well as, I am not aware that we have this, “but this would help and we would all be sharing the same message.”

These responses could indicate a lack of alignment in regards to the PR/External communications variable based on the perception of these staff. The data illustrates no shared understanding between national expectations and the regional behaviors and outcomes.

**Summary of Phase 1 and 2**

Phase 1 responses captured the senior executive leadership team’s expectations and assumptions for the organization, concerning the 5 variables. Phase 2 responses assess the understanding of the direct reports and the perceived measures of alignment. Although the management team had individual expectations in each area, most indicated that while they perceived a lack of regional alignment, they still believe regional staff were generally “doing the best they can.” Phase 1 sample responses are highlighted in Table 5 and some of Phase 2 responses are highlighted in Table 6. Both tables illustrate a concise sample of responses that begin to summarize the responses.
Table 5

*Phase 1 alignment indicator response summary*

<table>
<thead>
<tr>
<th>Variable</th>
<th>Question</th>
<th>Sample responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>Expectations?</td>
<td>“Manage their budgets, that’s really it.”</td>
</tr>
<tr>
<td></td>
<td>Regional Success?</td>
<td>“We’re successful if we keep our local offices informed and engaged…”</td>
</tr>
<tr>
<td>Mission Delivery</td>
<td>Expectations?</td>
<td>“Adoption of programs.”</td>
</tr>
<tr>
<td></td>
<td>Regional Success?</td>
<td>“To do the mission delivery and record the mission delivery.”</td>
</tr>
<tr>
<td>Volunteer/Community Engagement</td>
<td>Expectations?</td>
<td>“Call frequency” and “Face time”</td>
</tr>
<tr>
<td></td>
<td>Regional Success?</td>
<td>“Currently unacceptable.” “We need to do a better job recruiting.”</td>
</tr>
<tr>
<td>HR/Operational</td>
<td>Expectations?</td>
<td>“They have to follow the rules.”</td>
</tr>
<tr>
<td></td>
<td>Regional Success?</td>
<td>“Chapters who take reporting seriously…they are the ones that are going to be more engaged.”</td>
</tr>
<tr>
<td>PR/External Communications</td>
<td>Expectations?</td>
<td>“Anecdotal” and “To be champions of our story.”</td>
</tr>
<tr>
<td></td>
<td>Regional Success?</td>
<td>“On a scale of 1-5 regional rank a 2.”</td>
</tr>
</tbody>
</table>
Table 6  
*Phase 2 alignment indicator response summary*

<table>
<thead>
<tr>
<th>Variable</th>
<th>Question</th>
<th>Sample responses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fundraising</strong></td>
<td>Understanding?</td>
<td>“Success measurements….may not always be communicated across all levels of the organization…”</td>
</tr>
<tr>
<td></td>
<td>Perceived Success?</td>
<td>“I think our local success is strong.” And “We may not have the associated metrics established at the local level to truly define or to help drive behavior.”</td>
</tr>
<tr>
<td><strong>Mission Delivery</strong></td>
<td>Understanding?</td>
<td>“Measures have not been formally stepped down to regional, state, or individual objectives.” And “…not specific enough to define metrics on an annual basis.”</td>
</tr>
<tr>
<td></td>
<td>Perceived Success?</td>
<td>“We have gotten much better” and “I think we do a good job of delivering on the mission…”</td>
</tr>
<tr>
<td><strong>Volunteer/Community</strong></td>
<td>Understanding?</td>
<td>“…measurements often tend to be clearly defined but some of the definition appears to get lost when it trickles down to both the state and local level in regards to volunteers and implementation.”</td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td>Perceived Success?</td>
<td>“Volunteer cultivation, success is quite limited.”</td>
</tr>
<tr>
<td><strong>HR/Operations</strong></td>
<td>Understanding?</td>
<td>“I’m not aware of the specific goals/measurements.”</td>
</tr>
<tr>
<td></td>
<td>Perceived Success?</td>
<td>“Follow the rules…there is a chapter manual.”</td>
</tr>
<tr>
<td><strong>PR/External</strong></td>
<td>Understanding?</td>
<td>“Get the word out as much as we can, wherever we can.”</td>
</tr>
<tr>
<td><strong>Communication</strong></td>
<td>Perceived Success?</td>
<td>“We are still struggling to hit the mark with the masses.”</td>
</tr>
</tbody>
</table>
CHAPTER V

RESULTS, PHASE 3

Phase 3: All Staff Electronic Survey Results

This final phase of data collection is pinnacle to recognizing communication efforts, shared understanding realities, and mission-centric behaviors within a single organization. In Phase 1 and Phase 2 the data informed the research questions from the hierarchy of the organization. The most senior level of the NWTF and the direct reports offered their expectations and perceptions of understanding and success in the five variables. Phase 1 and Phase 2 data shaped the definitions and expectations Phase 3 survey questions tested at the all-staff level. This third phase of data collection seeks to shape the final analysis between national expectations and regional perceptions, Chapter V will describe the findings from Phase 3 and Chapter VI will provide a complete evaluation and discussion using all three phases of data to respond to the original research questions presented at the onset of the study, which include:

1. How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables?

2. To what extent do regional offices/field staff believe their office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.?

3. Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided?

4. To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance?
5. What mechanisms are in place for the national office to evaluate regional sites and what is evaluated?

6. What are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the alignment indicators?

Phase 3’s intra-organizational stakeholder survey included all staff at the national and regional offices. Survey questions were developed using the data collected at the face-to-face and email interviews to clearly understand the perceptions, relationship, communication and evaluation intra-organizationally. The survey was designed to support or challenge the findings that emerged from Phase 1 and Phase 2 to illustrate a shared understanding of mission alignment or lack thereof using the five variables as indicators of alignment (fundraising, mission delivery, volunteer/community engagement, HR/operations, and PR/external communication). Phase 3 identified the perceptions of each staff member related to the NWTF organizational design, structure, leadership, and shared commitment to the organization. These perceptions will allow the research to understand how Phase 1, 2, and 3 are similar or dissimilar and will be later discussed in Chapter VI.

Phase 3 engaged all 259 staff throughout the organization. This audience was not limited based on leadership function, job role, or capacity. The 259 participants represented all paid staff. The participants of Phase 1 and Phase 2 were invited to complete the Phase 3 electronic survey to guarantee everyone had the opportunity to answer the same question set for a thorough understanding of the organization.

The electronic survey was designed and distributed through QuestionPro software. The survey was distributed to all staff on 8/23/2016. A reminder email was sent to those that had not
yet completed the survey on 8/30/2016. By August 30, 2016 one hundred-sixty (160) respondents had completed the survey. The second reminder was sent at 9am on 9/2/2016, this “last call” message indicated that the survey would be closing at 11:59pm on 9/2/2016. At the time the survey closed there were 193 completed surveys, which is a 74.81% response rate.

The research was well-supported by the NWTF and had complete organizational leadership buy-in. The CEO provided a letter of project support at the start of the partnership and demonstrated consistent commitment through board meeting discussions of the project, on-site interview accommodation, CEO emails to encourage participation in the survey, senior executive team participation and inclusion of direct report participation, and an invitation to continue to relationship beyond the scope of this research project, for on-going training and development. Having such support from the organization allowed staff the freedom to share perceptions and opinions with a limited fear of retaliation. Ultimately, this buy-in granted the research a deeper perspective that included the opinions of staff that may have otherwise felt discouraged to participate.

First descriptive info will be reported. The 43 question survey was separated into similar sections as Phase 1 and 2 data collection. There were 38 primary indicator perception/evaluation questions the additional 6 were sample descriptive questions (Table 7). Following the 6 descriptive questions organizational framework responses will be described and then the responses from each of the five alignment indicator questions.
Table 7

Survey design

<table>
<thead>
<tr>
<th>Perception Categories/Questions</th>
<th>No. of Survey Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Descriptors</td>
<td>6</td>
</tr>
<tr>
<td>Organization Framework</td>
<td>8</td>
</tr>
<tr>
<td>Internal Communication/Directives</td>
<td>4</td>
</tr>
<tr>
<td>Staff Freedom and Flexibility</td>
<td>2</td>
</tr>
<tr>
<td>Alignment Indicators</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>4</td>
</tr>
<tr>
<td>Mission Delivery</td>
<td>6</td>
</tr>
<tr>
<td>PR/Communication</td>
<td>6</td>
</tr>
<tr>
<td>Volunteer/Community Engagement</td>
<td>5</td>
</tr>
<tr>
<td>HR/Operations</td>
<td>3</td>
</tr>
</tbody>
</table>

Descriptive Information

In question 2 respondents reported how long they had worked for NWTF. The results in Figure 15 illustrate 96 employees have been there 5 years or less, 24 respondents have been with the NWTF between 6-9 years, 59 have been there between 10-20 years and 14 of them have been with the organization over 20 years.

![Staff Respondent Tenure](image)

*Figure 15. Responses to the Question, “I have worked at the NWTF for:”*
Question 3, “My professional level within the organizational hierarchy is...” had 244 responses. Figure 16 illustrates that approximately seventy-four percent (180) self-identify as Staff. Eighteen percent (45) selected Manager, 3.6% (9) selected Senior Executive and the remaining four percent (10) chose “Other.”

![Figure 16](image16.png)

*Figure 16. Responses to the Question, “My professional level within the organizational hierarchy is...”*

Lastly, question number 39 asked the respondents to identify their location (national/regional). Of the 193 completed surveys, Figure 17 shows fifty-one percent (99) are based at the national and the remaining forty-nine percent (94) indicated they are based at a regional office.

![Figure 17](image17.png)

*Figure 17. Responses to Question, “I am based at...”*
Organizational Framework

Organization framework inquires considered themes such as organization-wide information dissemination as well as perceptions of staff autonomy and freedom. Considering question 39, which described where the respondent was based, question 40 demonstrated the perceptions of internal communication happening at the regional level, between the two regional leads; the Regional Biologist and the Regional Directors. The survey branched at Question 39 based on the response. If the respondent selected “A regional office” they were directed to Question 40. If the respondent selected “The national office” they were directed to Question 41. Question 40, “On average, how often do you work with your regional counterpart?” Table 8 illustrates the responses and shows that the majority of respondents, thirty-one percent (29), selected 1-3 times a week.

Table 8

Responses to the Question, “On average, how often do you work with your regional counterpart?”

<table>
<thead>
<tr>
<th>Frequency</th>
<th>No. of Responses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1x a month</td>
<td>16</td>
<td>17.02%</td>
</tr>
<tr>
<td>1x a month</td>
<td>6</td>
<td>6.38%</td>
</tr>
<tr>
<td>2x a month</td>
<td>20</td>
<td>21.28%</td>
</tr>
<tr>
<td>1-3x a week</td>
<td>29</td>
<td>30.85%</td>
</tr>
<tr>
<td>Daily</td>
<td>13</td>
<td>13.83%</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>8</td>
<td>8.51%</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>2.13%</td>
</tr>
</tbody>
</table>

Information dissemination. Questions 8, 9, and 41 gather information about staff’s perceptions of how information is communicated through the organization. Question 8 asked, “How do you receive organizational information?” Multiple responses could be selected per respondent and Question 8 had a total of 487 selections as well as thirteen unique qualitative
responses to “other”. Of the 487 responses, most indicated “informal communication” at thirty-one percent (150) and twenty-eight percent (137) selected “email from CEO or senior leadership” (Table 9).

Table 9

Responses to, “How do you receive organizational information?”

<table>
<thead>
<tr>
<th>Mode of Communication</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email from CEO or senior leadership</td>
<td>137 (28%)</td>
</tr>
<tr>
<td>Email from local/regional leadership</td>
<td>117 (24%)</td>
</tr>
<tr>
<td>Informal communication with peers or supervisor</td>
<td>150 (31%)</td>
</tr>
<tr>
<td>Communications team</td>
<td>58 (12%)</td>
</tr>
<tr>
<td>I don't</td>
<td>3 (.62%)</td>
</tr>
<tr>
<td>Other</td>
<td>22 (4.5%)</td>
</tr>
<tr>
<td>Total</td>
<td>487</td>
</tr>
</tbody>
</table>

Question 9 asked, “To what extent do you agree or disagree that the directions you receive (from all levels of the organization) are clear, concise, and next steps are understood?” Question 9 had two hundred and twenty three respondents of which approximately fifty-six percent (125) either agreed or strongly agreed while eighteen percent (41) disagreed or strongly disagreed. And Question 41 asked, “To what extent do you agree or disagree that intra-organizational dialogue occurs at all levels of the organization and is not restricted to a vertical chain of command?” The majority, forty-two percent (81) either agreed or strongly agreed and twenty-five percent (49) selected disagree or strongly disagree. Important to note is that Question 9 had twenty-six percent (57) select Neutral and Question 41 had approximately thirty-one percent (60) select Neutral.

Throughout the data collection phases information dissemination was considered. One analysis cross-tabulated question 3, “My professional level within the organizational hierarchy”
to question 9, what is the “perception of clear, concise direction received.” Of the 193 responses 140 of them were staff. Forty-three (43) staff were neutral and 21 either disagreed or strongly disagreed. In comparison, of the thirty-eight (38) managers that responded to the same question a higher percentage either disagreed or strongly disagreed with organization message clarity. In contrast to both staff and manager responses no senior executives answered disagree or strongly disagree.

The lack of acknowledgment from the senior team demonstrates a lack of shared understanding of the expectations from the top down. Of those 193 responses, thirty-eight (38) total indicated disagree or strongly disagree and over fifty (50) responses, total were neutral to the ideas of clear communication. Ninety (90) respondents were not in agreement that the information being disseminated through the organization was clear understood (Table 10).

Table 10

Cross-tabulation of frequency and percent for Question 3 and Question 9

<table>
<thead>
<tr>
<th>Q 3. My professional level within the organizational hierarchy is:</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Row Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>15</td>
<td>61</td>
<td>43</td>
<td>18</td>
<td>3</td>
<td>0</td>
<td>140</td>
</tr>
<tr>
<td>Manager</td>
<td>3</td>
<td>14</td>
<td>9</td>
<td>9</td>
<td>3</td>
<td>0</td>
<td>38</td>
</tr>
<tr>
<td>Senior Executive</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>8</td>
</tr>
</tbody>
</table>

Staff autonomy and flexibility. While seeking to understand all staff perception of the NWTF organizational framework an important theme presented itself during Phase 1 and 2. The
level of autonomy staff have and the intended flexibility management suggested staff have.

Questions 10 and 11 help understand if those perceptions are shared across the organization.

Question 10 asks, “To what extent do you agree or disagree that you have the appropriate amount of decision-making authority for your job?” Question 11 asks, “To what extent do you agree or disagree that you have freedom and support to do your job as you see appropriate?”

Both had similar responses in that Question 10 had seventy-two percent (139) agree or strongly agree and Question 11 had approximately seventy-two percent (139) agree or strongly agree.

Table 1 illustrates the staff autonomy perceptions.

Table 1

<table>
<thead>
<tr>
<th></th>
<th>Q 10. Decision Making Authority?</th>
<th>Q 11. Freedom/Support to Do the Job?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>21% (40)</td>
<td>26% (51)</td>
</tr>
<tr>
<td>Agree</td>
<td>51% (99)</td>
<td>46% (88)</td>
</tr>
<tr>
<td>Neutral</td>
<td>13% (26)</td>
<td>17% (32)</td>
</tr>
<tr>
<td>Disagree</td>
<td>10% (20)</td>
<td>9% (17)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>4% (8)</td>
<td>3% (5)</td>
</tr>
<tr>
<td>NA</td>
<td>0.00% (0)</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>Total</td>
<td>193</td>
<td>193</td>
</tr>
</tbody>
</table>

Is Alignment a Concern?

Lastly, Phase 3 sought to understand the staff-wide perceptions of overall alignment.

Questions 5, 6, and 7 gather information that supports this inquiry. All three questions had 226
responses and while the majority for all three questions answered Agree, the number of respondents that moved between the other answer options is interesting and can be seen in Table 12. Question 5 asked, “To what extent do you agree or disagree that you have a shared understanding of key characterizations of the metrics that have been given to you by Senior Leadership?” Question 6 was, “To what extent do you agree or disagree that there is a shared understanding of what effective communication means across the organization?” Question 7 asked, “To what extent do you agree or disagree that there is a shared commitment with executive leadership, senior management, and staff to the mission of the organization?”

Table 12

Alignment responses to Questions 5, 6, and 7

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q 5. Shared understanding of key metrics?</td>
<td>23% (45)</td>
<td>53%   (103)</td>
<td>15.5% (30)</td>
<td>6% (11)</td>
<td>0.50% (1)</td>
<td>1.55% (3)</td>
<td>193</td>
</tr>
<tr>
<td>Q 6. Shared understanding of effective communication?</td>
<td>12% (23)</td>
<td>40%   (78)</td>
<td>22% (42)</td>
<td>17% (33)</td>
<td>8% (16)</td>
<td>0.50% (1)</td>
<td>193</td>
</tr>
<tr>
<td>Q 7. Shared commitment with executive leadership, senior management, and staff to the mission?</td>
<td>24% (46)</td>
<td>48%   (93)</td>
<td>18% (35)</td>
<td>6.70% (13)</td>
<td>4% (7)</td>
<td>0.00% (0)</td>
<td>193</td>
</tr>
</tbody>
</table>

Indicators

Throughout the research five variables were employed to better understand alignment between the levels of the hierarchical corporate model nonprofit. Phase 1 and 2 asked open-ended questions to seek to understand what the variable measurements were and how those expectations are communicated. Phase 3 asks survey questions using the same five indicator variables to better
understand how the expectations at national are perceived and if the alignment measures are understood and consistent throughout the organization. The variables provide the consistent unit of analysis through the three phases of data collection.

**Fundraising.** Phase 1 responses demonstrated the need for field teams to use the mission to raise funds and the operations and field operations leadership noted that the budget only indicates the revenue bottom line but that each region has the freedom to hit their financial goals as they see fit. In the survey the three questions that best captured those expectations from senior leadership were questions 12, 13, and 14 (Table 13).

Table 13

*Fundraising responses to Questions 12, 13, and 14*

<table>
<thead>
<tr>
<th></th>
<th>Q 12. Fundraising allows for flexibility and creativity?</th>
<th>Q 13. Regional offices focus on the national mission statement when seeking funds?</th>
<th>Q 14. Mission-specific talking points are distributed by national for fundraising?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>16% (31)</td>
<td>15% (29)</td>
<td>10% (19)</td>
</tr>
<tr>
<td>Agree</td>
<td>41% (79)</td>
<td>44% (84)</td>
<td>45% (87)</td>
</tr>
<tr>
<td>Neutral</td>
<td>25% (49)</td>
<td>24% (47)</td>
<td>22% (42)</td>
</tr>
<tr>
<td>Disagree</td>
<td>9% (17)</td>
<td>5% (10)</td>
<td>13% (26)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>4% (7)</td>
<td>0.50% (1)</td>
<td>3% (6)</td>
</tr>
<tr>
<td>N/A</td>
<td>5% (10)</td>
<td>11% (22)</td>
<td>7% (13)</td>
</tr>
</tbody>
</table>

**Mission delivery.** Five separate questions generated responses specific to perceptions about how mission delivery is communicated, tracked, and what expectations are set to define and
measure mission delivery. While staff perceptions tend to agree with the statements of three key mission delivery questions (Table 14), the other two mission questions, Question 36 and 38, asked more specific knowledge-based questions.

Table 14

Mission delivery responses to Questions 34, 35, and 37

<table>
<thead>
<tr>
<th></th>
<th>Q 34. National office uses multiple communication channels to express mission delivery expectation?</th>
<th>Q 35. The regional employees understand the expectations of mission delivery?</th>
<th>Q 37. Mission delivery programs should be created/implemented to best fit a local need?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>8.29% (16)</td>
<td>13.47% (26)</td>
<td>26.94% (52)</td>
</tr>
<tr>
<td>Agree</td>
<td>48.19% (93)</td>
<td>48.70% (94)</td>
<td>53.37% (103)</td>
</tr>
<tr>
<td>Neutral</td>
<td>25.91% (50)</td>
<td>24.35% (47)</td>
<td>13.47% (26)</td>
</tr>
<tr>
<td>Disagree</td>
<td>11.92% (23)</td>
<td>5.70% (11)</td>
<td>3.11% (6)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>4.15% (8)</td>
<td>2.07% (4)</td>
<td>0.52% (1)</td>
</tr>
<tr>
<td>N/A</td>
<td>1.55% (3)</td>
<td>5.70% (11)</td>
<td>2.58% (5)</td>
</tr>
<tr>
<td>Total</td>
<td>193</td>
<td>193</td>
<td>193</td>
</tr>
</tbody>
</table>

For the sake of this research question, one of the most relevant analyses was using Question 37 and cross-tabulating it with Question 3. Question 3 asked, “Professional level within the organizational hierarchy” and Question 37 asked, “What are the mission-critical
Program delivery does your office encourages, promotes, and/or supports? This analysis demonstrates which levels of the hierarchy selected specific mission programs that they perceived as important to the mission work of the organization. More importantly, which mission-critical programs were receiving the support of the staff?

Of the sixty-eight (68) responses that indicated “Turkey Hunters Care” program is mission-critical, zero (0) were senior executives and sixty (60) of the total sixty-eight (68) responses were from staff. Only 1 senior executive indicated the “Turkey Education in a Box” program was mission-critical but sixty-three (63) of the seventy-eight (78) responses were from staff. Lastly, of the sixteen (16) choices the survey offered for mission-critical program delivery options zero (0) senior executive respondents selected the “other” category. Therefore, all nationally-approved, mission-delivery programs were listed in the sixteen (16) response options. However, thirteen (13) respondents did select “other”. Eight (8) were staff and five (5) were managers. The complete cross-tabulation table can be found in the appendices (Appendix M). Table 15 describes the three responses that illustrate misalignment based on mission delivery expectations and behaviors.

Table 15

Mission-critical program perceptions/level of professional hierarchy

<table>
<thead>
<tr>
<th>Q 37. Which mission-critical program delivery does your office encourage, promote, and/or support? (SELECT ALL THAT APPLY)</th>
<th>Staff</th>
<th>Manager</th>
<th>Senior Executive</th>
<th>Other</th>
<th>Row Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey Hunters Care (N)</td>
<td>60</td>
<td>5</td>
<td>0</td>
<td>3</td>
<td>68</td>
</tr>
<tr>
<td>Turkey Hunters Care (%)</td>
<td>4.23%</td>
<td>1.66%</td>
<td>0%</td>
<td>3.75%</td>
<td></td>
</tr>
<tr>
<td>Turkey Education Box (N)</td>
<td>63</td>
<td>10</td>
<td>1</td>
<td>4</td>
<td>78</td>
</tr>
<tr>
<td>Turkey Education Box (%)</td>
<td>4.44%</td>
<td>3.31%</td>
<td>1.33%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Other Programs (N)</td>
<td>8</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>Other Programs (%)</td>
<td>0.56%</td>
<td>1.66%</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>
Question 36 asked, “What is the mission of the organization?” Six responses were available to select from. Table 16 illustrates the options and response rates. Of the 193 staff responses, 48 (25%) answered incorrectly. This response begs the follow up question, can staff who don’t know the actual mission of the organization have meaningful input on mission delivery work?

Table 16

*Responses to Question 36, “What is the mission of the organization?”*

<table>
<thead>
<tr>
<th>Mission Options</th>
<th>Response Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save the Hunt, Save the Habitat</td>
<td>6.67% (13)</td>
</tr>
<tr>
<td>Turkeys Forever</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>Save the Habitat, Save the Hunt</td>
<td>16.92% (33)</td>
</tr>
<tr>
<td>Conservation of Wild turkeys and preservation of our hunting heritage</td>
<td>75.12% (145)</td>
</tr>
<tr>
<td>Conserve, restore, and manage associated habitats for turkeys</td>
<td>1.03% (2)</td>
</tr>
<tr>
<td>Other</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>Total</td>
<td>193</td>
</tr>
</tbody>
</table>

Question 38 asks staff to identify all answers that apply to “Which mission-critical program delivery does your office encourage, promote, and/or support?” The importance of Question 38 is to recognize that there are regional offices participating in programs that are not considered mission-critical by the national office. Thus demonstrating the lack of alignment in mission delivery programs between national and regional offices.

**Volunteer/community engagement.** The NWTF is an organization that relies on volunteer commitment throughout the country. Many respondents in Phase 1 and Phase 2 indicated that the volunteers were the life-blood of the organization. While the NWTF is a corporate model hierarchy with a paid staff model, the volunteer recruitment and leadership is critical to the mission delivery and fundraising efforts year-round.
The all staff survey asked five questions that were specifically targeted toward the perceptions of the staff regarding volunteer/community engagement expectations and measurements. Question 22 asked, “To what extent do you agree or disagree that the national office creates volunteer policy that fits the needs of the regional office, given their local conditions?” Approximately forty-four percent (75) either Strongly Agreed or Agreed while only approximately 11 percent (22) answered Strongly Disagreed or Disagreed. However, thirty-three percent (64) of the respondents answered Neutral.

Question 23 asks, “To what extent do you agree or disagree that the expectations of volunteer engagement, designed by the national office, are understood by all employees?” While thirty-two percent (61) were Neutral on this response almost thirty-five percent (68) answered either Strongly Agree or Agree while just over twenty-five percent (50) answered Strongly Disagree/Disagree.

Development of volunteer opportunities at the regional offices has a slightly higher support rate, indicating that field staff believe that they have the autonomy to create/design various ways to engage the community as the local conditions allow. Question 24 asks, “To what extent do you agree or disagree that regional offices develop volunteer opportunities that fit the needs of the community?” Almost fifty percent (95) answered positively while just over ten percent (20) indicated a negative perception. Just over twenty-six percent (53) remained Neutral.

Question 25 provided employee perceptions of volunteer engagement training field staff receive. “To what extent do you agree or disagree that employees are trained in volunteer engagement to generate opportunities for members to engage with NWTF at multiple levels of interest?” The response split was similar to that of Question 23 responding to the understanding of volunteer expectations from national. Here, in Question 25 the Strongly Agree/Agree responses
were over thirty-eight percent (74) and the Strongly Disagree/Disagree responses were almost thirty percent (57), the Neutral responses were almost twenty-seven percent (53). Table 17 illustrates the responses for Questions 23 and 25.

Table 17

**Volunteer/community engagement responses to Questions 23 and 25**

<table>
<thead>
<tr>
<th></th>
<th>Q 23. The expectations of volunteer engagement, designed by the national office, are understood by all employees?</th>
<th>Q 25. Employees are trained in volunteer engagement to recruit volunteers at multiple levels of interest?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>4.66% (9)</td>
<td>5.70% (11)</td>
</tr>
<tr>
<td>Agree</td>
<td>30.57% (59)</td>
<td>32.64% (63)</td>
</tr>
<tr>
<td>Neutral</td>
<td>31.61% (61)</td>
<td>27.46% (53)</td>
</tr>
<tr>
<td>Disagree</td>
<td>21.24% (41)</td>
<td>24.35% (47)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>4.66% (9)</td>
<td>5.18% (10)</td>
</tr>
<tr>
<td>N/A</td>
<td>7.25% (14)</td>
<td>4.66% (9)</td>
</tr>
<tr>
<td>Total</td>
<td>193</td>
<td>193</td>
</tr>
</tbody>
</table>

Question 26 was an open-ended response to evaluate staff perceptions on volunteer skills needed. The range was vast and of the 209 responses to Question 26 asking, “List the top three qualities you believe are important in a NWTF volunteer” a few primary qualities surfaced throughout:

- Civic Responsibility
- Passion/Interest
- Leadership
- Flexibility
- Enthusiasm
- Integrity/Honesty
- Commitment/Dedication
- Salesmanship
- Vision for NWTF
- Communication
- Loyal/Dependable
- Service
- Understands the Mission
- Influential
- Professional
Of this list, many were mentioned in multiples. However, none of the lists were the same qualities. The variations wouldn’t be a critical indicator of misalignment within the volunteer/community engagement variable, but it is interesting that no staff had the same needs from a volunteer. This begins to suggest that volunteer needs given the community conditions or local leadership may vary and/or that volunteer expectations are not the same throughout the regional staff, given the

**HR/operations.** Human Resource and Operations functions, expectations, and clarity perceptions were assessed in Questions 27, “To what extent do you agree or disagree that human resource practices and expectations, designed by the national office, are understood and accepted by employees?” Question 28, “To what extent do you agree or disagree that the regional offices develop local operations practices that fit the needs of the community?” Lastly, Question 29 which asks, “To what extent do you agree or disagree that the national office provides training to staff?”

Table 18 shows the responses to these three questions.

Table 18

**HR/operations responses to Questions 27, 28, and 29**

<table>
<thead>
<tr>
<th>Q 27. Human resource practices and expectations are understood and accepted by employees?</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9% (17)</td>
<td>54% (103)</td>
<td>23% (45)</td>
<td>11% (22)</td>
<td>2% (4)</td>
<td>1% (2)</td>
<td>193</td>
</tr>
</tbody>
</table>

| Q 28. Regional offices develop local operations practices that fit the needs of the community? | 5% (10) | 41% (79) | 33% (64) | 7% (14) | 1% (2) | 12% (24) | 193 |

| Q 29. National office provides training to staff? | 7% (13) | 36% (70) | 27% (52) | 22% (43) | 8% (15) | 0.52% (1) | 193 |
A cross-tabulation of Question 39, determining where the staff is based at and Question 29, asking about perceptions of trainings offered illustrates the discrepancy in perception based on location of the staff member.

Table 19

**Cross-tabulation frequency and percent for Question 39 and Question 29**

| Q 29.To what extent do you agree or disagree that the national office provides training to staff? | Q 39. I am based at: | Strongly Agree | Agree | Neutral | Disagree | Strongly Disagree | N/A | Row Total |
|---|---|---|---|---|---|---|---|---|---|
| The national office | 8 | 42 | 24 | 22 | 4 | 0 | 100 |
| A regional office | 5 | 28 | 28 | 21 | 11 | 1 | 94 |
| Column Total | 13 | 70 | 52 | 43 | 15 | 1 | 194 |
| Column Percent | 6.7% | 36.08% | 26.8% | 22.16% | 7.73% | 0.52% | 100% |

**PR/external communications.** The all-staff survey asked questions regarding the individual perceptions of the PR/Communications expectations, training, and successes. Within the 43 question survey, six questions offered responses to that inquiry.

Question 16 asked, “To what extent do you agree or disagree the NWTF employees have a shared agreement on the expectations of a communication/marketing plan?” Table 20 shows that approximately 42% (82) either agree or strongly agree that there is a shared understanding of expectations.
Table 20

Responses to the Question, “To what extent do you agree or disagree the NWTF employees have a shared agreement on the expectations of a communication/marketing plan?”

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q 16. NWTF employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>193</td>
</tr>
<tr>
<td>have a shared agreement of the expectations of a communication/marketing plan?</td>
<td>6% (12)</td>
<td>36% (70)</td>
<td>28% (54)</td>
<td>21% (41)</td>
<td>5% (9)</td>
<td>4% (7)</td>
<td></td>
</tr>
</tbody>
</table>

Question 17 asked “To what extent do you agree or disagree that NWTF’s communication/public relations efforts and expectations allow creativity and flexibility to create region-specific external messaging opportunities?” Fifty-one percent either Strongly Agreed or Agreed and almost 17% either Strongly Disagreed or Disagreed. Approximately 26% (51) were Neutral. Question 18 asked, “To what extent do you agree or disagree that the regional sites share stories of success with the national office/communications team?” Question 19 asked the inverse of 18, “To what extent do you agree or disagree that the national office shares stories of success with regional employees?” Table 21 illustrates Question 18 and 19 and the perceived reciprocity and dependency on one another.

Question 20 asks, “To what extent do you agree that there is a standard/approved ‘30 second elevator pitch’ that highlights the NWTF’s work across multiple focal landscapes?” Table 22 shows of the 193 people that responded to this question almost 30% believe there are not approved messages from national.
Table 21

*Responses to Questions 18 and 19*

<table>
<thead>
<tr>
<th></th>
<th>Q 18. Regional shares stories with national</th>
<th>Q 19. National shares stories with regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>3.50% (7)</td>
<td>6% (12)</td>
</tr>
<tr>
<td>Agree</td>
<td>40% (78)</td>
<td>51% (99)</td>
</tr>
<tr>
<td>Neutral</td>
<td>29% (57)</td>
<td>25% (48)</td>
</tr>
<tr>
<td>Disagree</td>
<td>13.5% (27)</td>
<td>11% (22)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>2.50% (5)</td>
<td>1% (2)</td>
</tr>
<tr>
<td>N/A</td>
<td>10% (19)</td>
<td>5% (10)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>193</strong></td>
<td><strong>193</strong></td>
</tr>
</tbody>
</table>

Table 22

*Responses to the Question, “To what extent do you agree that there is a standard/approved ‘30 second elevator pitch’ that highlights the NWTF’s work across multiple focal landscapes?”*

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Q 20. There are approved messages that highlight NWTF’s mission delivery/successes</td>
<td></td>
</tr>
<tr>
<td>Strongly Agree OR Agree</td>
<td>41% (79)</td>
</tr>
<tr>
<td>Neutral</td>
<td>22% (43)</td>
</tr>
<tr>
<td>Strongly Disagree OR Disagree</td>
<td>30% (58)</td>
</tr>
<tr>
<td>N/A</td>
<td>7% (13)</td>
</tr>
</tbody>
</table>

Finally, the last question in the PR/Communications section (Question 21) asked, “To what
extent do you agree or disagree that NWTF’s brand identity is a critical piece of the organization’s message?” Considering these responses it is clear that a strong majority of staff believe that brand identity is a critical piece of the message. Eighty-four percent (163) answered either Strongly Agree/Agree however compared to Question 20, a significant percentage of staff do not believe there are messages that are specifically developed to promote the brand/mission. This disconnect will be discussed further in Chap VI.

**Shared Understanding of Institutionalized Expectations**

Six questions provide an additional understanding of overall perceptions of institutional expectations and behaviors. Feelings of trust and commitment as well as shared understandings of infrastructure and organizational purpose and design are evaluated in Questions 31, 32, 33, 42, and 43.

Table 23 shows that in Question 31, which asks, “To what extent do you agree or disagree that the NWTF organizational chart is clear and easily located?” Forty-six percent (89) responded positively and twenty-eight percent (53) negatively (almost 25% were neutral).

Table 23

*Organization chart, response to Question 31*

<table>
<thead>
<tr>
<th>Q 31. The NWTF organizational chart is clear and easily located?</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10.36% (20)</td>
<td>35.75% (69)</td>
<td>24.87% (48)</td>
<td>20.73% (40)</td>
<td>6.74% (13)</td>
<td>1.55% (4)</td>
<td>193</td>
</tr>
</tbody>
</table>

Question 32 and 33 were related to the Chapter Manual. The Chapter Manual is the document of rules and policies set forth by the national office to direct the field staff and volunteers. It is a set of required behaviors for field staff as it relates to volunteer committees and
fundraising efforts. Table 24 shows the responses to both Chapter Manual questions. Question 32 asked “To what extent do you agree or disagree that the Chapter Manual is relevant to your position?” Forty-three percent (83) agreed or strongly agreed while 26 disagreed or strongly disagreed. Question 33 asked, “To what extent do you agree or disagree that the development of the 2016 Chapter Manual included your insights?” Of the 193 respondents 44 answered positively and 49 answered negatively. Additionally, 60 were Neutral and 40 answered N/A.

Table 24

Responses to Questions 32 and 33, regarding the development and use of the chapter manual

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q 32. The Chapter Manual is relevant to your position?</td>
<td>14% (28)</td>
<td>28%   (54)</td>
<td>31%     (59)</td>
<td>10%      (19)</td>
<td>4% (7)</td>
<td>13% (26)</td>
<td>193</td>
</tr>
<tr>
<td>Q 33. The development of the 2016 Chapter Manual included your insights?</td>
<td>6% (11)</td>
<td>17%   (33)</td>
<td>31%     (60)</td>
<td>15%      (29)</td>
<td>10% (20)</td>
<td>21% (40)</td>
<td>193</td>
</tr>
</tbody>
</table>

Question 42 and 43 seek to understand the perceptions of staff regarding the cohesion and clarity between all levels of the organization as it relates to transparency, expectations, and shared understanding of goals, metrics, and expectations. Question 42 asks, “To what extent do you agree or disagree that NWTF executive leadership, management, regional offices, and staff are transparent in all expectations and outcomes within the organization?” Question 43 asks, “To what extent do you agree or disagree that a shared understanding of goals, metrics, and expectations is critical to the success of the NWTF?” Table 25 compares the responses.
Table 25

Responses to Question 42 and 43

<table>
<thead>
<tr>
<th></th>
<th>Q 42. NWTF executive leadership, management, regional offices, and staff are transparent in all expectations and outcomes within the organization?</th>
<th>Q 43. A shared understanding of goals, metrics, and expectations is critical to the success of the NWTF?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>6.22% (12)</td>
<td>51.03% (99)</td>
</tr>
<tr>
<td>Agree</td>
<td>40.93% (79)</td>
<td>41% (79)</td>
</tr>
<tr>
<td>Neutral</td>
<td>27.46% (53)</td>
<td>7.73% (15)</td>
</tr>
<tr>
<td>Disagree</td>
<td>17.62% (34)</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>7.24% (14)</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>N/A</td>
<td>0.52% (1)</td>
<td>0.00% (0)</td>
</tr>
<tr>
<td>Total</td>
<td>193</td>
<td>193</td>
</tr>
</tbody>
</table>

Question 39 asked where the staff member was based, ninety-four (94) of the 193 responses indicated they were regional staff. Twenty-seven (27) of the 94 regional respondents noted they disagreed or strongly disagreed with the transparency of the organization regarding the expectations for alignment, asked in question 42 (Table 26). This demonstrates that almost 30% of the regional respondents might not trust that they know and understand the actual expectations of the senior leadership team.
Cross-tabulation of frequency and percent of Question 39 and 42

<table>
<thead>
<tr>
<th>Q 39. I am based at:</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
<th>Row Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>National office</td>
<td>7</td>
<td>42</td>
<td>28</td>
<td>14</td>
<td>7</td>
<td>1</td>
<td>99</td>
</tr>
<tr>
<td>Regional office</td>
<td>5</td>
<td>36</td>
<td>25</td>
<td>20</td>
<td>7</td>
<td>1</td>
<td>94</td>
</tr>
<tr>
<td>Column Total</td>
<td>12</td>
<td>78</td>
<td>53</td>
<td>34</td>
<td>14</td>
<td>1</td>
<td>193</td>
</tr>
</tbody>
</table>

Column Percent: 6.25% 40.62% 27.6% 17.71% 7.29% 0.52% 100%

The final analysis will include all five variable assessments and illustrate a shared understanding of success indicators or lack thereof. Survey responses were used to inform the analysis of shared meaning for mission alignment variables. The shared understanding of the variables and alignment is evaluated based on expectations set from the national office.

The degree of variation in responses between the 3 phases of research were significant. The multi-phase process gave insight into varying perspectives informal and formally. Chapter VI will broaden the discussion and seek to understand the themes in alignment expectations and shared understanding. Using the data in Chapter IV and V, shared commitment and understanding will be evaluated for implications considering organizational design and resources.
CHAPTER VI
DISCUSSION AND CONCLUSION

The intent of this case study was to study the causes and implications of alignment within an organization. Specific indicators were selected to evaluate alignment between headquarter expectations and the behaviors of regional/field staff. This study focused on five variables: fundraising expectations, mission delivery expectations, volunteer/community engagement expectations, HR/operations expectations, and the PR/communications expectations. Creating a shared understanding of these expectations, behaviors, and outcomes generates alignment within each variable and thus guides the regional team to perform in a way that is expected, accepted, and aligned with the national office.

The following questions were used to guide this study and create data collection instruments to best understand the organizational process, expectations, and behaviors throughout:

1. How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables?

2. To what extent do regional offices/field staff believe their local office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.?

3. Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided?

4. To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance?
5. What mechanisms are in place for the national office to evaluate regional sites and what is evaluated?

6. What are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the alignment indicators?

In each phase of the data collection a deeper recognition of the indicators were represented. The data suggests that without a shared understanding of what success is, from the national leadership, it is challenging to meet the demands and remain aligned.

The six broad research questions are used to address the key findings of the data. The research findings are supported through existing literature and theoretical development. In an effort to continue to strengthen this research and demonstrate an on-going need in the national nonprofit infrastructure research domain, a review of outstanding research topics will be addressed.

**Summary of Phase 1, 2, and 3**

Phase 1 responses assess the expectations of the senior executive leadership team. These five people, under the direction of the CEO, create the alignment strategies and measures that the regional offices and each field staff member aim to address. Through this initial phase of data collection the most obvious findings were that there was limited consistency between all the responses in any one indicator discussion. This implies that, if the senior team is creating the national expectations for alignment and they lack similar language and expectations then the trickledown effect may also lack a cohesive message and understanding of the national alignment requirements. Although the senior team had individual expectations in each area, most indicated that while they perceived a lack of regional alignment, they still believe regional staff were
generally “doing the best they can.” The general overview (Table 5) of indicator feedback also shows that there is a disregard for the lack of specific alignment behaviors, as long as the budget numbers are met. These data were used to compare and contrast understandings of direct report staff to the expectations of their senior executive team. Seeking to understand if there is a breakdown in shared understanding of mission alignment behaviors, outcomes, and measures at the first level of the information dissemination. Through the presentation of Phase 1 and Phase 2 data alignment/lack thereof in the five indicators begins to present itself. Major findings included an obvious shared commitment to the mission. The umbrella purpose of the work is supported at both levels. Additionally, the shared understanding was a unique finding.

Phase 2 respondents seemed to have a false sense of national expectations or were openly unclear of expectations. If the expectations of the national office are unclear to the direct reports, who pass messaging to the regional teams how the regions can be perceived as successful? However, when asked if those regional staff were successful in each of the variables, an overwhelming number of Phase 2 responses indicated the regional offices were successful. This research illustrates the lack of clarity in information dissemination. An unexpected finding when comparing the Phase 1 and 2 data was the realization that in areas that the senior leadership indicated a lack of performance by the regional team the direct reports felt otherwise, based on their perceptions of national expectations. This could indicate that the messaging from national regarding these alignment indicator expectations are not producing the intended response. Perceptions are not matching the national responses between the 2 levels of the organization.

These eleven people, under the direction of individual members of the senior executive team, communication the alignment strategies and measures to their regional office subordinates. Through this phase of data collection the most obvious findings were that there was limited
consistency between all the responses in any one indicator discussion. This implies that, if the management team is communicating the expectations for alignment and they lack similar language and expectations then the trickledown effect may also lack a cohesive message and understanding of the national alignment requirements.

Phase 3 survey respondents shared their understanding and perceptions of the expectations within the organizational framework as well as the five alignment indicators that were used to test alignment expectations within all three phases of the data collection. Within these responses the data collected demonstrates a shared commitment to the mission of the organization but a disjuncture in a shared understanding of what success measurements are as well as a consistent and effective mode of communication to express these organizational understandings. Overwhelmingly, staff across the organization are eager to work on behalf of the mission but the execution is lacking a cohesive approach. Instead, all expectations are communicated and understood within the silo the staff and management are in.

During Phase 1 it became clear that the six senior leaders demonstrated a lack of cohesion between the separate interviews within the upper level of the organization. The shared commitment to progress and the mission of the organization was clear throughout but the understanding of the direction and implementation steps varied. In contrast, Phase 2 interviews were analyzed and there was a closer shared understanding between the senior leader responses and their direct report responses. Thus, indicating a stronger communication connection within the hierarchy or direct reports but lacking across the organization. This silo-effect was evident based on the findings of the first two phases of data. The third phase illustrated a continued mission commitment as well as a lack of clarity of expectations and ability to meet standards set-forth without the training and additional resources.
Theoretical Understanding of Alignment

Reflexivity-in-action create a relationship model and joint understanding of expectations and abilities. Leadership in a nonprofit organization requires constant trade-offs between mission, securing resources, and strategy (Herman, 2010; Worth, 2017). Nonprofits have a high tolerance for ambiguity. Resource dependency and reflectivity theories provide a framework to make sense of the relationships within a nonprofit. However, Helmut Anheier (2014) suggests that the components of a nonprofit are diverse and complex. “Therefore the structure of nonprofit organizations may require a multi-faceted, flexible approach… [Rather than] the ready-made models carried over…from public management” (p. 328).

The unique purpose and models of nonprofit organizations make the organizations lesser pawns in governmental control but also severely reliant on donor and volunteer support (Worth, 2017). Donor/volunteer engagement efforts of field staff play an enormous role at corporate model nonprofits. They are the liaison to the donors and volunteers that the national organization needs in order to realize its mission at the ground level. This begins to form a resource dependent relationship between the field staff office and the national headquarters. Intra-organizational stakeholders, (local or national offices) are often seen as having rights; resource dependency theory models the mutual responsibility of both entities to the other for streamlined mission work (Fassin, 2012).

Through this research, one conclusion is that resource dependency and reflexivity theories remain a good tool for understanding the cause and/or effects of alignment. However, these theories fail to account for the hierarchical model of a corporate nonprofit, especially when applied to the question “what is the definition of alignment?”
Summary of Key Findings

**R1: Information Dissemination, Clarity, and Mode of Communication**

To understand what causes alignment in each indicator the communication throughout the organization was reviewed. Perceptions of information dissemination, clarity of messaging, and mode of communication were evaluated. Research Question 1 asked: How do the regional offices/field staff understand what is expected of implementation for mission-specific activities within the five variables?

Phase 3 survey responses compared to Phase 1 senior leadership team perspectives on collaboration at the regional level illustrated the lack of behavior alignment in regards to communication processes and tools. The Phase 1 interviews suggest that conversation is valued and expected. But no quantities for success measurements are noted to cross reference the responses. There are anecdotal data that suggests, the more they work together the better. One senior executive suggested that formal bi-weekly communication (twice a week) between the regional directors and regional biologists in addition to issue-specific, as needed dialogue would be a “good start.” That expectation compared to the survey responses demonstrates a majority of regional staff that are not aligned with the communication expectations. However, more concerning is that those regional teams cannot be held to a communication standard, formally, because those expectations have not been communicated in a meaningful way to cause the intended behaviors.

The survey responses left room for further speculation on how expectations are communicated and what the perception for success is. Upon further review the responses about the clarity of communication, compared to the open-ended dialogue responses, which asks about the mode of communication, are not supportive of one another. Thus, bringing into question the
ideas of creating an organization shared understanding. This lack of “overlap of understanding and concepts among group members” (Mulder & Swaak, 2002, p. 36) exhibits a possible disconnect in how the intra-organizational messaging is being perceived and processed across the organization. A disjuncture in expectations and understanding is the core of a lack of shared understanding due to communication efficacies. A perception of different goals or misaligned strategies could be demobilizing and inefficient. Multiple authors have suggested that to develop a shared understanding it is important to consider external factors, such as physical proximity, incentives, communication support, and organizational culture (Deshpande, 2005; Hseih, 2006; Kleinsmann & Valkenburg, 2008; Langan-Fox, Anglim, & Wilson, 2004). Therefore creating shared understanding allows members to trust their abilities and better align efforts to achieve success (Aube, Rousseau, & Tremblay, 2015).

In support of organization communication ideals the literature suggests that creating a shared understanding “involves discussing common goals and how to achieve them” (Aube et al., 2015; Van Ginkel & van Knippenberg, 2012). Hermon (1996) cited, “understanding the role communication plays in building understanding…is imperative” (p.439). Additional authors posit that regular dialogue between members, organized training, team-building and strategic planning activities also support the creation of shared understandings (Cannon-Bowers, 2007; Mathieu, Maynard, Rapp, & Mangos, 2010).

Over fifty percent of the respondents believe that messaging is clear. However, a sampling of responses to a different question gave an opposing insight. “We are a 1970’s style company, ran by threatening vs. motivating people’s qualities.” “…Sporadic emails from others at headquarters…we need a better way to know when there are changes.” “There is a general lack of communication within the organization.” “Rare [communication] from senior
leadership.” It is clear that although over half of the respondents believe that messaging is clear there are a subset of respondents who do not. They do not understand the messaging or they are not receiving it in a mode that addresses the expectations.

A surprise finding from the analysis of all three phases was the lack of cohesive communication efforts as perceived in Phase 1 and Phase 2. The senior executive team and the management team all believed the communication was happening in a meaningful and deliberative way. However, while a majority of Phase 3 respondents agreed with Phase 1 and 2 perceptions of internal communication efforts and opportunities, it was in this category that the responses began to offer higher rates of negative responses.

Throughout Phase 1 and Phase 2 a theme was the reactive nature of the communications process as well as the need to “sell the mission” for a better mission delivery pitch and growth in measurable outcomes in many of the alignment indicators. The PR/Communications efforts are clearly looked to as an important part of developing messaging and disseminating the mission successes throughout the country. Although there was no survey question in which the responses were a majority disagree, the PR/external communication indicator was a major theme where lack of clarity and expectation was present in the initial phases but, seemingly presented as a non-issue in the all staff survey. Again, demonstrating that the field staff is not perceived as performing in this by senior levels within the organization but do not have a clear understanding otherwise and therefore believe they are behaving as expected and in alignment with mission behaviors.

Within this analysis, lack of both message clarity and shared understanding can be viewed as a cause of misalignment. This misalignment is better understood through the specific theoretical lens of resource dependency theory. Whereby, it is realized that the regional/local
staff are dependent on information and appropriate, effective, regular communication from the senior leadership team. Conversely, the national team highlighted that they believe that organizational messages are communicated down but there is a lack of response or new communication coming up the hierarchy. RDT suggests that sharing, holding, and maintaining power is a tenet of the theory. The NWTF case study highlights the “information is power” struggle.

If it is understood that all alignment begins with a shared understanding of the initial expectations this analysis is a critical indicator that there are employees under the senior executive leadership team that do not have a shared understanding based on how information is received from various organizational outlets.

**R2: Expectation Variations and Understanding**

Through the themes presented in the data, it was clear that regional teams are “doing the best they can” according to both Phase 1 and Phase 2 respondents. What was truly telling were the responses to identify a shared understanding of the expectations across the organization. Research question 2 asks: To what extent do regional offices/field staff believe their local office should be functioning under different alignment expectations of those five variables given differences in geography, demographics, SES, etc.? Phase 1 and Phase 2 respondents noted that there is a lack of understanding because field staff don’t have a clear understanding of what success expectations are or how to track them. In the survey only 13 either disagreed or strongly disagreed to having a shared understanding of metrics. This indicates that field staff respondents don’t know what they don’t know and believe they do have a shared understanding. Also, the responses demonstrate an inconsistency between the Phase 1 and 2 responses, between the manager and senior executive survey responses. It continues to demonstrate a lack of
institutional clarity of what success is and how it is communicated. Creating and sustaining a shared understanding stems from the intra-organizational communication modes and clarity.

Through this case analysis the causes of alignment, using the indicators and the effects of these alignment expectation, is better understood. Reflexivity theory frames this analysis, in that decisions are crafted at the national level but the relationship between the levels in the hierarchy presumably take precedent and adjustments are constantly made to the initial and organizational decision. These variations of expectations and in essence the success measure for each regional office are a result of the reflexive nature of the management team. While being reflexive demonstrates the organizations ability to respond it also presents a challenge when evaluation measures are adjusted in an effort to “do the best you can.”

A general overview of the responses to the survey offered additional query. Overall, the majority of responses to all questions were strongly agree or agree. Indicating the majority of employees do intend on doing mission-centric work in a way that aligns with the national office. However, the alignment between Phase 1 and Phase 3 is lacking. Phase 1 clearly noted that the expectations are not being met. The staff are “trying” or “doing their best” but not producing in a way that responds to the expectations. One example is how the mission is used to secure funds, volunteers, and raise awareness.

Throughout Phase 1 and 2 it was clear that the respondent’s perceptions were that the regional staff needed to focus more using the mission to generate interest and funds. However, based on survey results there is an indication that more regionally based employees disagree or strongly disagree that the mission is used to raise funds.

Based on the contradictions between these questions and answers throughout the phases of data collection the research begins to understand the alignment indicators may be
misconstrued based on inconsistent or misunderstood messaging from the hierarchy. These variations in expectation understanding can lead to misaligned behaviors and seem to address the perceptions found in Phase 2, whereby managers indicated that the field staff are “doing the best they can” but also Phase 1 where, when asked if alignment was a concern the general answer was “yes.”

**R3: Expectations and Resources**

Consistent throughout Phase 1, 2, and 3 training and staff development was a theme as it is relevant to the alignment measures and understanding of expectations from senior leadership. Research question 3 asks: Is there a relationship between the expectations of those five variables and the equipment (resources, tools, and training) provided? Phase 1 and 2 provided areas of interest for training and also suggested the current ways staff development occurs. However, when asked in Phase 3 about provided trainings the response was weaker, in comparison. For shared understanding to occur, what is communicated has to connect at least partially with what the other person knows or has experienced while reflecting the policies of the organization. This is why orientation programs and trainings are important for successful as employees. A good training program should create shared meaning that helps the individual understand what will be experienced and communicated in the days to come (Patterson, Grenny, McMillan, & Switzler, 2012). The call for more training can be viewed as a resource dependent behavior. Noting the national office is perceived to have the information and the regional teams are in need of it. Additionally, the reflexivity of the senior office to respond to the request for training can be seen as reflexive in nature; as it is a direct response based on real-time needs of the regional staff.

**Fundraising training.** As demonstrated in Phase 1, there are expectations in fundraising- set forth by the senior executive leadership team. Most often set against the annual
budget. Regardless, there are understood performance metrics to be successful in fundraising, throughout the organization. Regional staff need to be skilled in fundraising and aware of the expectations to perform at the level that is expected. When asked about formal fundraising training opportunities, the mid-level management team noted the following: There is “nothing formal outside of new staff training/on-boarding.” “There is no training provided” and there is “little fundraising training form the NWTF, have read a couple books that were recommended.”

Without the appropriate training environments the organizational learning rests on the shoulders of the staff/supervisors that create the culture and expectations of the specific job. Instead of developing a high-impact organization that connects all fundraising to mission work and vice versa. Staff perceive the fundraising “ask” as a metric that is in place with no clarity on how to get there or opportunities to continue to build skill sets that best speak the mission in an effort to generate revenue that would, in essence create alignment to the national expectations of fundraising. The burden, in this case, seems to be on the national office to offer fundraising trainings that support to metrics that have been put in place to justify fundraising alignment between national and the field staff.

These trainings are limited however, it appears that the tools for mission-specific advocacy and promotion are perceived to be available and easily accessible. This demonstrates that there is information but the staff still crave more training to respond to the mission expectations and create a shared understanding of national alignment expectations.

**R4: National Mandates and Compliance**

Shared commitment starts at the senior levels of the organization. Research question 4 asks: To what extent are regional sites impacted by policy development and mandates from the national office? Is it realistic to assume compliance? There was an agreement across the senior
leadership team regarding mission work and the centrality of these efforts to the long-term impact of the organization. What was surprising was the lack of shared understanding the senior executive leadership team had across their functions. The literature discusses the hierarchical models whereby the communication is generated at the top and organizational messaging is disseminated (Brillant & Young, 2004; Young, Bania, & Bailey, 1996; Grossman & Rangan, 2001; Young, 1989, Zald, 1970). At the NWTF it was evident that varying members had alternate expectations for the alignment indicators and that there was a lack of symmetry amongst the leadership team. This was an unexpected finding, as the initial intent of the research was to identify specific alignment behaviors that the senior leadership team used as their metric. After discovering that a shared understanding at the most senior level was not consistent it became clear that the focus of the research would be instead, to identify the possible lack of shared understanding and explore the causes and effects of that disconnect.

For example, Phase 2 suggests that operations policies are unclear and lack developed leadership to demonstrate expectations from the national office. However, when asked in Phase 3 over 60% agreed or strongly agreed that HR policies are understood and accepted by employees. This suggests that employees believe they are behaving as expected. Conversely, it might also suggest that the management level of the organization is unclear about what the expectations are, how they are being messaged, and how they are being tracked- specifically. This disconnect between the 2 levels of responses is another indicator that may be misaligned due to lack of clarity of expectations. A lack of shared understanding of what success is in the area of operations is indicated by the survey response analysis in comparison to the responses from Phase 1 and 2.
Misaligned behaviors in response to compliance and mandates are better understood because of the reflexivity lens through which it is explored. Reflexivity theory would argue against the value of mandates and instead embrace the flexibility of creating a situation that responds to the needs of the regional office and vice versa. NWTF national provides structure and direction for the regional staff and in return requires compliance in a number of areas. Conceptually, this is the core of the corporate model hierarchy. Suggesting reflexivity at all levels for all indicators may be unrealistic. However, what the research did highlight was when reflexivity could be useful. The development of the goals and measurement of the indicators would provide a platform for reflexive behaviors between multiple levels of the organization that ensure appropriate measure and feasible requirements.

A consistent theme of the research was that there is a very optimistic outlook on the direction of the organization. There is a willingness to put in the work and to grow the organization based on a shared commitment to the mission of the organization.

**R5: Appropriate Evaluation Tools and Metrics**

One constant component of all three phases of data collection was the inquiry into how the identified successes were tracked and measured. Research question 5 asks, what mechanisms are in place for the national office to evaluate regional sites and what is evaluated? The goal of this line of questioning was to best understand the perceptions of how success is evaluated and to demonstrate a consistency between the tools and systems the senior executives noted and the understanding of these tools throughout the organization.

Authors Cameron and Whetten (1983), posit that there is not one universal determinant of organizational effectiveness. What was clear was that there is a performance review system. The online performance tracking system uses eleven competencies to recognize individual
performance (Appendix K). Additionally, a “GoalSharing” system was implemented whereby everyone can see the movement of the organization within the revenue and conservation goals outlined in the 2016 plan. The online GoalSharing dashboard provides a tool for all staff to see the progress in each of these goals, as an organization.

**NWTF strategic plan.** The NWTF strategic plan (2016) offers the following as the four Fundamental Goals for the organization: 1) Increase the nationwide population of wild turkeys to 6.7 million. 2) Create 1.5 million hunters and open 500,000 acres to hunters by 2022. 3) Conserve or enhance at least 4 million acres of wildlife habitat by 2022. 4) Increase annual gross revenues to $82 million and grow adult membership to 225,000 by 2022. Using the strategic plan goals to determine state and regional goals makes sense, however there is a lack of alignment in these measures. The dissonance is multi-fold. First, throughout the phases of research it was clear that the definitions of each of these key areas are varied and lack consistency in understanding (e.g. what is a “hunter”? or how an acre is preserved). Instead, the only goal that has a clear definition is the revenue expectation. The organization does acknowledge these definitions however, the concern is that there is a lack of shared understanding. Bittner and Leimeister (2014) defined *shared understanding* as: “the degree to which people concur on the value properties, the interpretation of concepts, and the mental models of cause and effect with respect to an object of understanding” (p.115). Shared understanding allows for deeper functioning teams and higher performance outcomes (Mohammed, Ferzandi, & Hamilton, 2010; Salas, Fiore, & Letsky, 2012; Wildman *et al.*, 2012). At the NWTF because the shared understanding, throughout the organization, is compromised staff may struggle to trust their abilities and better align efforts to achieve success (Aube, Rousseau, & Tremblay, 2015).
The second area of dissonance is that reporting is lacking. From the data it was noted that staff are not clear on how to track and senior executives acknowledged that the tracking process is time-intensive and cumbersome for the field teams. Therefore, tracking and measuring may not be accurate and presented in real-time.

There is a financial incentive for goals met via the Goal$haring dashboard and the organization has seen better compliance when a financial incentive is attached to reporting but that does not alleviate the lack of shared understanding of definitions and the value of the dashboard concept for the organization. The dashboard tracks organizational outcomes and the performance appraisals are designed to track individual behaviors and attitudes but neither discussed the root of alignment. Instead, both assume clarity of purpose and expectations. This research demonstrates that beyond numeric representation understanding expectations is limited. Tracking what is not clear becomes an exercise in futility, as it relates to mission alignment behaviors within the organization.

**MIMNOE evaluation principles.** One method of evaluation that was discussed in Chapter II was Sowa, Seldon, and Sandfort’s (2004) MIMNOE model. The Multidimensional, Integrated Model of Nonprofit Organizational Effectiveness (MIMNOE) principles focus on two areas of nonprofit effectiveness: management effectiveness and program effectiveness. Using the five alignment indicators in this research, the basic premise of the MIMNOE internal evaluation model can be used to understand the alignment of a large hierarchical nonprofit organization. The five key principles of the MIMNOE model are described below as it pertains to the NWTF expectations and tools for evaluation. Based on all three phases of data collection these principles can be assessed as follows:
**Principle 1:** There are multiple dimensions of effectiveness, primary are management and program. Designed to legitimize how well structures operate and the impact it has on the employees. NWTF met principle 1 because both program and management are considered important to the success of the organization. “An organization that is well managed and operated but delivers poor programs is not fully effective, just as an organization that delivers well-run programs but has an unhappy staff or poor overall organizational operations is not fully effective” (p. 715). At NWTF program and leadership effectiveness are seen via the hierarchical structure as well as the regional and local volunteer efforts for program outreach. Each supervisor is responsible for the success and efforts of their subordinates. This demonstrates the leadership’s commitment to support their subordinates and deflect alignment concerns in an effort to create cohesive relationships. Since effectiveness and alignment measures are not clearly stated for all five indicators the structure of the organization provides for senior staff to deflect misaligned behavior on the premise of “staff are doing the best they can.” Although management and programs are evaluated at the NWTF they lack a cohesive approach throughout the organization. Therefore, through the lens of principle 1 NWTF lacks organizational effectiveness/alignment.

**Principle 2:** Management and Program effectiveness are further composed of sub dimensions, capacity and outcomes. NWTF recognizes principle 2 but has not yet implemented the success measures that deepen the evaluation beyond output metrics. Multiple indicators can be used to address this principle, however clearly defining expectations within this principle will better create direction and purpose. The NWTF implemented the 2016 Strategic Plan which illustrates their 4 fundamental goals. These are now being used to track outcomes across the organization. To accomplish these goals deeper discussions must include how each state and
chapter will participate in the nation-wide goals. At the time of this research approximately 20 states had submitted state-wide plans that supported the national goals. The sub dimensions of achieving these goals are in the hands of the state and local chapters. “Too often, outcomes alone become the indicators of choice for representing organizational effectiveness. Yet, hidden behind those outcome measurements are complex and diverse dynamics that may vary across and within organizations and programs” (p. 715). These outcomes will be the product of organizational alignment around national expectations for these goals.

Principle 3: Both objective and perceptual measures are needed to fully capture the dimensions of effectiveness. Perceptions help understand the function/dysfunction whereby impacting the effectiveness of the organization. NWTF has not met principle 3. Principle 3 is clearly the major disconnect in alignment at the NWTF. Creating the shared understanding of expectations is the pinnacle of the research. This process values the creation of a reflexive feedback loop, where leadership can ensure that expectations are understood which will assist in the alignment of mission behaviors. Ensuring clarity can better align the performance evaluation tool to measure mission alignment behaviors based on the shared understanding of expectations. “Perceptual measures alongside objective measures of the indicators of effectiveness can measure alignment…. with the perceptions of those that participate in the organization on a day-to-day basis and develop a more comprehensive understanding organizational dysfunctions that may be reducing the effectiveness of the organization” (p. 716). Measuring behaviors without accounting for the misperceptions may present in inaccurate evaluation of programs or performance throughout the organization.

Principle 4: Organizational effectiveness should allow for organizational and programmatic variations within a systemic structure. Management models should transcend
across the organization but there can be variations between programs structures. NWTF met principle 4 within the framework of a corporate model nonprofit. Principle 4 “assumes that certain management structures and processes transcend all programs operated by the organization, but that the program level structures and processes may vary between programs” (p. 716). The corporate model limits the allowed management variations. However, the regional model illustrates multiple programmatic variations and reflective management practices that vary based on the needs. This principle is captured throughout the research as it discusses the need for reflexivity in the organization. The caution is that in a corporate model organization it is critical that behaviors do not veer from the core premise of the program or purpose in order to suit the local conditions. Variations are, in fact, one cause of an alignment concern. These same programmatic variations can be seen as opportunities for mission drift and inaccurate representations of the brand. Nonetheless, without the flexibility to provide programs and leadership to the region as local conditions require would threaten the organization’s relevance and long-term recruitment efforts for organizational growth.

Mission delivery instructions and a core template that cannot be altered, while allowing for variations in pre-identified areas of each mission-specific directive would allow chapters to be responsive at the local level as well as demonstrate a strong reflexive organization. In order to create these programmatic models the national office must first consider evaluating each programmatic design, removing programs that are no longer considered “mission delivery”, and developing mission delivery-approved opportunities for the field team to customize, as allowed by national and relevant to local.

Principle 5: The analytics used should capture multiple levels of interrelationships between dimensions of organizational effectiveness. The final principle of the MIMNOE
evaluation model examines the tool and content to measure. Principle 5 notes “there is the need for multilevel hierarchical modeling that allows for the examination of variation at different levels of the hierarchy” (p. 721). The NWTF does not meet this principle, in that effectiveness is not examined throughout the organization but instead in silos that are output-centric. Per the responses collected in this research, simple outputs may not always be the final indicator of success. Therefore, creating measurements for each alignment indicator, based on clear expectations, is vital to the ability to track alignment behaviors. Clear expectations are defined by the senior team and communicated throughout the organization which allows for a cohesive evaluation model for mission alignment based on expectations and rooted in a shared understanding of how alignment is being captured. The MIMNOE model does caution that the challenge in this analytic is that there has been a struggle in the sector to identify an evaluation model that considers the resource dependency between the levels of the organization and how that dependency can alter evaluation measurements.

The tools that NWTF are currently using to track performance are typical of most organizations and some are cited in the literature (Chapter II). However, this research begins to illustrate the gap in performance tools that first define the expectation, confirm understanding of the expectation, and support programs that speak only to the mission of the organization. Some of the principles of MIMNOE have been adopted and there are clear indicators that the NWTF is eager to design systems that being to recognize the management and programmatic measures of effectiveness. The misalignment presents when the performance measure cannot or should not be linked to financial inputs/outputs but instead is a mission outcome (e.g. number of hunters created). Quantifying methods of measure that are not easily quantifiable leaves excessive room for misunderstanding in how success is defined. Subsequently, the senior leaders and
management team are left with a “the staff is doing the best they can” perception but no formal evaluation tool to support that.

**NWTF five star state chapter commitment.** Lastly, it is important to note that the NWTF loosely employs one tool to help enhance mission-specific work across the chapters. The “NWTF Five Star State Chapter Commitment” (Appendix L) is a recognition program that outlines 5 key criteria to achieve the 5 star award. According to the NWTF (2016), the program is designed to encourage mission-centric behavior at the state chapter level and states:

> By entering into this State Chapter Five Star Commitment, we resolve to be a chapter that excels in the areas of Conservation, Hunting Heritage, Fundraising for the Hunting Heritage Super Fund (including the Outreach Fund), and Membership. Furthermore we resolve to support the local chapters in our state in achieving Local Five Star status and in the process give something back to the communities that support our efforts for wildlife conservation, protecting our right to hunt, developing a stronger relationship between the state and local chapters, creative a positive image for the organization and building a better future for our country (p.1).

The 5 Star program is an excellent start to tracking and rewarding mission-specific behaviors. The concern is that this program is designed only for the volunteer-led local and state chapters and is not a requirement. Therefore, this 5 Star tool does not evaluate staff’s alignment behaviors and is only an option for participation at the volunteer level to help encourage, but not make mandatory, mission-critical behaviors. Upon further consideration of this research, a required evaluation tool that mirrors the optional 5 Star Commitment program is a much closer fit to defining expectations and creating a shared understanding of alignment behaviors. This
program does not currently consider the variables HR/operations, PR/external communications, and volunteer/community engagement but it does a better job providing clear definitions of mission-specific behaviors in the other indicators.

Through an evaluation like the 5 Star Commitment in tandem with the MIMNOE principles organizational alignment behaviors can be considered in a tangible and meaningful way. Clarity would be welcomed throughout the staff model as well as the training to perform in expected capacities. Reflexivity theory and RDT suggest that such evaluation measures, like MIMNOE, would require a process that engages in information gathering and responsive dialogue between the regional team and the senior leadership team. This would create a success measurement system at acknowledges the needs (strengths/weaknesses) of both sides and responds to the concerns and direction of the organization.

**R6: Organizational Dissonance and Continuity**

There is a differing of opinions and shared understanding of what are mission delivery programs in the organization. The final research question (6) asks, what are the similarities and differences between national expectations, direct report communication, and the all staff perceptions of shared understanding through the alignment indicators? A lack of alignment of mission behaviors became evident based on the lack of understanding of what was expected and considered mission delivery.

The programs that need to be highlighted are the ones that the staff or management team selected as important but the senior leadership did not. The dissonance is a specific demonstration of misalignment between the expectations, understanding, and behaviors of the staff. The “Turkey Hunters Care” program was identified to some staff as mission critical but to the senior leadership it was not. “Turkey Education in a Box” was also an example of mission
delivery programs that are not approved by the national office, yet field staff is engaging in these programs.

Lastly, a vast majority of respondents agreed or strongly agreed that NWTF’s brand identity is critical to the organization’s message. However, another theme demonstrated throughout the data collection was the lack of brand training offered throughout the organization. Alignment expectations are generated under the assumption that all staff understand and can respond to the mission of the organization. Thus, working under a shared commitment to the organization. In reality, there appears to be a lack of shared understanding of the brand, expectations, and how to speak the organization’s mission and work as the national office has approved. Instead, many at the staff level have developed their own talking points and messages to build the brand in their community as those field staff see fit. Again, causing misalignment in expectations, cohesive messaging, and shared understanding of the organization’s brand.

Through the theoretical lens of RDT and reflexivity theory organizational misalignment is better understood. A majority of this research illustrates the concern of having not enough reflexive behavior or value of the resource dependent relationship to create a shared understanding and expectations. However, the analysis of research question 6 lends itself to a contradictory review using the two theories. Reflexivity theory can better understand an interpersonal relationship between the management team and the staff where the genesis of the misalignment may reside. Being too responsive and flexible has changed the expectations between offices. Additionally, RDT explains the intra-organizational design to help explain the power relationship between the levels of the organization. Ultimately, RDT can help understand the fear each level has in losing the relationship and organizational buy-in for the mission. Instead of relying on strong deliverables to measure success, beyond revenue, the varying levels
believes the other holds the power for the organization. Given this relationship a misunderstanding of success as well as a misalignment of behaviors can occur.

**Limitations and Delimitations of the Study**

**Limitations**

The research design is intended to be heavily qualitative in nature and therefore personal perspective is profoundly relied upon and can be challenged between offices. Understanding and meaningful communication become a critical variable for alignment and within this design we seek to understand such variables in addition to the reflexivity and critical thinking opportunities field staff are provided with the intent to strengthen mission alignment at both levels of the organization.

**Sample representation.** This research is limited by the singular case-study design which seeks to understand the perceptions of employees of one organization. The selection of only one nonprofit corporate model organization does narrow the responses and thus prohibits the ability to broadly generalize the results. Also, the choice to interview senior leaders at the national and local levels and survey the remaining may limit the response collection from all members of the organization. However, both of these were purposeful decisions to explore this relationship and to highlight the gap in knowledge within this nonprofit model.

**Survey fatigue and respondent burden.** Another limitation was the possible effect of survey fatigue on survey completion. The survey was sent to 259 staff members, it was viewed/opened 378 separate times, started 258 of those 378 times and finally completed by 193 participants. Unknown to the researcher, at the time of survey distribution some (but not all) of the staff were also involved in a survey from an external consultant on volunteer efforts. Steeh (1981, p. 5), explains that “overexposure to the survey process” may have caused disinterest in
completing the survey. Nonrespondents have cited concerns, such as: time constraints, survey content, and number of previous survey as survey fatigue indicators (Porter, Whitcomb, & Weitzer, 2004). Respondent burden, defined by Sharp and Frankel (1983), is the time and effort a participant must commit to participate in the survey. The perceived or implied burden could be a limitation of survey completion.

**Alignment indicator relevance.** The 5 indicators were suggested by the researcher, supported by the literature, and approved by the organization’s leadership. The alignment indicators may vary between organizations and it would be critical to determine the alignment indicators with each organization prior to reproducing the study.

**Delimitations**

This study focused on the causes and effects of mission alignment using 5 specific indicators. It was not created to understand what mission alignment is or what it should be. To conduct the research in the meaningful phases, as presented, the research relied on the suggestions of the senior leadership for Phase 2 participants. To help address possible survey fatigue a predominantly Likert scale-type survey was employed. I purposefully did not conduct interviews with all respondents due to time sensitivity.

**Recommendations for Future Research**

The research illustrated many interesting finding that assist in understanding alignment between the regional/local levels and the senior executive leadership team. This section highlights topics that are areas for further exploration. Some unexpected findings offer additional themes of alignment expectation and behavior causes and effects research.
Advanced research that would strengthen the models Young, Bania, & Bailey (1996) began would offer new knowledge of the mechanistic or organic design. The nonprofit sector continues to evolve. Developing a deeper understanding of the four original infrastructure models as well as identifying their relevancy and any other hybrid models will strengthen the understanding of hierarchical behavior and alignment expectations. Identifying the correct model-fit for the corporate structured organization that also has federation tenants was an important realization for the research and the sector would benefit from infrastructure models that are revised to address other variations.

Moreover, further research could consider replicating just Phase 1 of this research with additional corporate model nonprofit organization to further solidify the five variables and how to best define and measure each of them within a broader context.

Additionally, research could consider the importance of volunteer and/or board alignment. This research was centered on staff alignment however, volunteer alignment and/or board alignment and direction is a legitimate component. To evaluate alignment behaviors in a volunteer-centric nonprofit considering the volunteer behaviors would allow for an additional perspective on the shared understanding of mission alignment behaviors.

Lastly, other theoretical frames may help to understand these alignment behaviors in the nonprofit sector. For example, the hierarchical relationship and organization culture or expectations and shared understanding could be addressed using the institutionalism framework or principal-agent theory.
Conclusion

The National Wild Turkey Federation’s organizational commitment to this research, and ultimately to staff growth, provided an excellent platform to explore the primary research question: *To what extent does local align with national?* The purpose of this study was to explore the concepts of organizational alignment within the national/corporate model infrastructure. Whereby the findings highlighted the space for regional/local staff to be misaligned and demonstrated the need for clear definitions of alignment indicators, as well as uncovered the procedures of information dissemination as a causal relationship to alignment behaviors.

As the literature continues to suggest, multi-level design and hierarchical structure of a corporate model lends itself to boundary rigidity. *Boundaries*, as Kelly and Allison (1999) describe, are critical to a system’s interconnectedness. There is a need to create an environment that balances interconnectedness, boundaries, and network development. However, this balance requires an internal communication norm that is structured to clearly define and explain expectations to ensure mission alignment throughout the organization levels, using a shared commitment and understanding approach.

This research calls attention to a three step process that other national nonprofits could benefit from replicating. Recreating the process could provide a new wealth of knowledge about: what alignment is to each organization, what variables are important to demonstrate alignment, how those variable expectations are communicated, and if there is consistent and cohesive shared understandings of the national expectation throughout the organization. Through this research the national office can begin to recognize specific mission alignment strengths and weaknesses within the levels of the organization.
This study exemplifies the first step to understanding alignment measures within a hierarchical national nonprofit organization. These findings and methodology create the platform for continued research using other organizations to further generalizability and to expand the alignment question to include other key stakeholders, beyond employees.
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Appendix A

NWTF Strategic Plan
NWTF
Inspiring Vision Through Tradition
STRATEGIC VISION
2016-2022
"Our ability to perceive quality in nature begins, as in art, with the pretty. It expands through successive stages of the beautiful to values as yet uncaptured by language."

— Aldo Leopold

OUR MISSION
Conservation of the wild turkey and preservation of our hunting heritage

WHO WE ARE
Founded in 1973, the National Wild Turkey Federation strives everyday to ensure wild turkeys and other wildlife have the best chance to thrive. Our work on the ground is unparalleled, because of our passion to conserve the nation’s rich natural resources so that generations following us can enjoy them as we do today. Our mission has inspired countless volunteers and partners to stand with us to promote habitat conservation and the outdoor traditions we hold dear. Hunters, anglers, birders, biologists, land managers, wildlife professionals, foresters: These are a few who comprise the NWTF and fuel our efforts to keep wild turkeys and other wildlife flourishing and our ability to hunt them unchallenged.

OUR VALUES

CONSERVATION ETHIC
We act to uphold a strong reputation for treating wildlife and habitats with respect.

FAITH AND FAMILY
We value divine principles and unifying family support to guide our actions.

HUNTING HERITAGE
We value and enjoy hunting and support its role in wildlife management and human ecology.

HUNTING PRIVILEGE
We uphold the rights to hunt and bear arms.

LEADERSHIP
We seek and retain the best leaders in conservation in our volunteer base and staff.

VOLUNTEERISM
We know the NWTF is successful in accomplishing our mission because of our dedicated volunteers.

WILDLIFE HABITATS
We conserve and enhance North America’s wildlife habitat.
# CONTENTS

4 History of a Vision

5 Setting a Foundation

6 Fundamental Goals

8 Robust Populations of Wild Turkeys

10 Conserving Healthy Habitats

12 Preserving our Hunting Heritage

14 Building an Organization for the Future

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James Earl Kennamer, Ph.D.  
*Development Advisor*

**BUSINESS IMPLEMENTATION TEAM**

Co-Chairs:  
Steve Barlow  
Joel Federman

**Team Members:**  
Nancy King  
Doug Little  
Shawn McWilliams  
Ray Smith  
Matt Lindler  
Mikal Moore  
P.J. Perez  
Marilyn Wooten

**NATIONAL STRATEGIC PLANNING COMMITTEE**

Harlen Starr, Chair

Scott Hill  
Louis Young  
Robert Higginbotham  
Peggy Anne Valley

---

Strategic Vision 2016-2022 | 3
HISTORY OF A VISION

"We have fallen heirs to the most glorious heritage a people ever received, and each one must do his part if we wish to show that the nation is worthy of its good fortune."

— Theodore Roosevelt

The story of the National Wild Turkey Federation started many years before the organization was actually founded. In fact, our story began when President Theodore Roosevelt and our nation realized that without efforts to control the decline of wildlife species across the United States, the balance of our nation's natural resources would be damaged forever. It was because of this conservation ethic that we, as a country, learned to value wildlife and wild places, not only for food and recreation but also as integral parts of our ecology and human well-being.

In 1973, a locally known outdoor writer and turkey hunter from Virginia, Tom Rodgers, recognized a need to help wildlife agencies with their efforts to restore wild turkeys to all suitable habitat across North America. His vision: Pool the resources of hunters, partners and others to provide assistance to state agencies, facilitate the transfer of wild turkeys and other wildlife, and create an easy way for these agencies to work together to build wild turkey populations in their states.

The NWTF quickly grew as more hunters and conservation-minded people joined forces to create what has been heralded as one of the greatest conservation success stories of our time, increasing turkey populations from roughly 1.5 million to a high of nearly 7 million in just 30 years.

FUTURE HOME...
THE NATIONAL WILD TURKEY FEDERATION, INC
Made possible by a grant from Flexo-plate division • Tranter, Inc.
SETTING A FOUNDATION

"Of all the questions which can come before this nation, short of the actual preservation of its existence in a great war, there is none which compares in importance with the great central task of leaving this land even a better land for our descendants than it is for us."

— Theodore Roosevelt

Just as Tom Rodgers' vision guided the first 40 years of the NWTF, a new initiative will take us into the next decade.

The loss of habitat, hunters and places to hunt in our nation brought about an urgent call to action — to conserve or enhance more than 4 million acres, recruit 1.5 million hunters and open access to an additional 500,000 acres of land to public hunting and outdoor recreation. Simply put, our new charge is to Save the Habitat. Save the Hunt. Through this initiative, we are saving the things that mean the most to our organization and our members: wild turkeys, wild places and our hunting traditions.

Pair these with a concerning decline in wild turkey populations in some states, and it is clear that the NWTF must focus on solutions to move in all that we do. The Complex, exactly what we need to explore for the future of our organization will help us bring new revenue and organizational strength. This effort will serve as a springboard to help the NWTF continually grow to meet new challenges and innovate the direction of conservation for the future.

This document presents to our volunteers, members, partners and staff four fundamental goals, which represent the core principles that will guide our efforts. They will direct every aspect of our work over the next decade, as we deliver on the Save the Habitat. Save the Hunt. initiative and beyond.

SAVE THE HABITAT.
SAVE THE HUNT.

1.5 million hunters recruited
4 million acres of habitat conserved or enhanced
500,000 acres of hunting access opened
FUNDAMENTAL GOALS

ROBUST POPULATIONS OF WILD TURKEYS

VISION: The NWTF will use the best available science and techniques to achieve healthy, well-managed wild turkey populations in all suitable habitats to provide quality hunting experiences.

OBJECTIVE: Increase the nationwide population of wild turkeys to 6.7 million in agreement with state wildlife agency management objectives.

PRESERVING OUR HUNTING HERITAGE

VISION: The NWTF will uphold and preserve our hunting heritage by engaging our passionate volunteers to share the culture and lifestyle they cherish through efforts focused on recruitment, retention and reactivation and providing a social support network to new or reactivated hunters.

OBJECTIVE: Create 1.5 million hunters by addressing barriers to participation and opening 500,000 acres to hunter access by 2022.
CONSERVING HEALTHY HABITATS

VISION: Through our volunteers and partners, the NWTF will provide the highest quality habitats that foster abundant wild turkey populations and other wildlife and create exceptional places to pursue hunting and other outdoor activities.

OBJECTIVE: Conserve or enhance at least 4 million acres of wildlife habitat by 2022.

BUILDING AN ORGANIZATION FOR THE FUTURE

VISION: The NWTF will focus on long-term organizational growth and stability to ensure efficient mission delivery.

OBJECTIVE: The NWTF will increase annual gross revenues to $82 million and grow adult membership to 225,000 by 2022.
ROBUST POPULATIONS OF WILD TURKEYS

VISION: The NWTF will use the best available science and techniques to achieve healthy, well-managed wild turkey populations in all suitable habitats to provide quality hunting experiences.

OBJECTIVE: Increase the nationwide population of wild turkeys to 6.7 million in agreement with state wildlife agency management plans.

U.S. Wild Turkey Population Goals and Trends

<table>
<thead>
<tr>
<th>Subspecies</th>
<th>Current Population</th>
<th>Goal Range</th>
<th>Current State Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern</td>
<td>4,684,000</td>
<td>4,900,000 - 5,050,000</td>
<td>11 - 13 - 10</td>
</tr>
<tr>
<td>Merriam's</td>
<td>262,000</td>
<td>240,000 - 300,000</td>
<td>3 - 6 - 1</td>
</tr>
<tr>
<td>Rio Grande</td>
<td>853,000</td>
<td>900,000 - 1,000,000</td>
<td>3 - 6 - 1</td>
</tr>
<tr>
<td>Osceola</td>
<td>114,000</td>
<td>103,000 - 115,000</td>
<td>0 - 1 - 0</td>
</tr>
<tr>
<td>Gould’s</td>
<td>1,200</td>
<td>1,000 - 1,500</td>
<td>1 - 0 - 0</td>
</tr>
<tr>
<td>Hybrid</td>
<td>296,000</td>
<td>280,000 - 300,000</td>
<td>3 - 2 - 1</td>
</tr>
<tr>
<td>Total</td>
<td>6,210,000</td>
<td>6,461,000 - 6,716,500</td>
<td>19 - 28 - 13</td>
</tr>
</tbody>
</table>

The restoration of the wild turkey is one of the greatest conservation success stories of North America. Wild turkey numbers increased steadily after restoration work began, and by the late 1990s to early 2000s, the population reached nearly 7 million birds. Today, however, some regions of the wild turkey’s range are experiencing concerning declines from those historic highs.

“Seeing a wild turkey in a field in the 1960s and even into the 1970s was something to talk about,” said James Earl Kennamer, Ph.D., NWTF special advisor to development and former NWTF chief conservation officer. “Before that, you just didn’t see them, because there were so few.

“As technology increased and wildlife professionals became more familiar with the types of habitat each subspecies required to thrive, turkey numbers started to grow at an unprecedented rate. We were in the throes of Target 2000, moving birds from state to state and even within states, and everything came together perfectly. Even before the target date of 2000, we’d fulfilled our mission and turkeys were thriving across North America.”

Over the past decade, however, wildlife professionals have again become worried about the future of the wild turkey in some regions. It’s not just limited to Eastern wild turkeys; Merriam’s also are seeing a downturn. Dramatic declines have wildlife professionals striving for a solution.
Since the peak in 2004, populations of Eastern wild turkeys have dropped about 16 percent across their range. Merriam's wild turkey numbers have declined 24 percent in that same timeframe. "In some regions, populations are still growing, while in others, we have seen sharp declines," said Robert Eriksen, retired NWTF regional biologist. While there is an overall trend in many places, there are regions where turkey populations are growing.

It's not just wildlife professionals who have noticed the drop in wild turkey numbers; hunters have noticed it, too. Spring harvests have declined in several states, such as New York, which had a 60-percent drop in harvest numbers between 2001 and 2011.

"Historically, the problem turkey hunters faced in western New York was which gobbler to set up on in the morning," said Doug Little, NWTF conservation field supervisor (Northeast). "Now the problem is actually finding one. It was a region with a rich history for wild turkeys and turkey hunting and a go-to destination for turkey enthusiasts. Now, most turkey hunters wouldn't go out of their way to visit the area, based on the current turkey population."

In a constantly changing landscape, targeted research helps wildlife managers understand how to adapt management and regulations to give wild turkeys the best chance to endure these fluctuations. It is vital the NWTF remains dedicated to funding conservation work and research that will stabilize wild turkey populations over the long term.

It's also going to take an active voice in policy making to build science-based support for state wildlife agency strategies that benefit wild turkey populations and hunting opportunities. Becoming the nation's leader in funding wild turkey research positions the NWTF to have a powerful voice in developing those policies and educating lawmakers. Our role in informing policy makers must continue to grow for us to meet the ever-changing challenges that face us.

Working with state wildlife agencies through the NWTF Technical Committee and other avenues fosters a constant exchange of information between the NWTF and state wild turkey biologists. This continuous communication keeps wild turkey and turkey hunting concerns as a top focus for agencies that regularly deal with myriad species, and helps develop management strategies that accommodate regional concerns.


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### Wild Turkey Population Trends

**TOTAL**

- 2014 data does not include California, which reported 242,000 Rio Grande turkeys in 2009.

**EASTERN**

**MERRIAM'S**

[Graph showing population trends over time]
CONSERVING HEALTHY HABITATS

VISION: Through our volunteers and partners, the NWTF will provide the highest quality habitats that foster abundant wild turkey populations and other wildlife and create exceptional places to pursue hunting and outdoor activities.

OBJECTIVE: Conserve or enhance at least 4 million acres of wildlife habitat by 2022

Forty years ago, the nation’s landscape lacked much different than what it does today. Family farms dominated the rural countryside; fencerows and unmanaged field edges thronged with quail and songbirds. Woodlots, following drains, streams and rivers divided the croplands and provided travel routes and havens for deer and wild turkeys. You had to drive a considerable distance between towns and cities.

"Today, it’s hard to tell where one city ends and the next begins," said Donnie Buckland, NWTF private lands manager. "Suburbanization of rural America and encroachment on previously undevelopable lands has created a glut of development and a deficit of wild lands — habitat that wildlife depend upon. In the Southeast, many farms have been converted to pine plantations, and of the farms that are left, modern farming techniques are aimed at maximizing production. Long gone are fencerows and tall-grass prairie corners. The call of the bobwhite has nearly gone with them. Every day, the United States will lose 5,300 acres of this critical habitat to urbanization alone, through 2050."

With this loss of critical wildlife habitat, the NWTF must change its focus to maximize the quality of the habitat that remains. "When I first started working with the NWTF, it was right at the time that the focus on turkey restoration was waning down," said Kurt Simon, former Natural Resources Conservation Service liaison to the NWTF. "The organization was doing a lot of habitat work, but they really had a shotgun approach in their delivery: working on a lot of small projects."

These small projects did benefit turkeys on a small scale and gave our volunteers a sense of accomplishment locally, but there wasn’t a lot of focus on creating large-scale changes to the habitat until the Save the Habitat, Save the Hunt initiative was launched.

"Save the Habitat, Save the Hunt, and the creation of focal landscapes [captured in America’s Big Six of Wildlife Conservation] has provided focus for the NWTF," Simon continued. "You have a much clearer vision now of what you want to achieve and how you will do it. Save the Habitat, Save the Hunt, has really given the volunteers, as well as staff, a new energy for delivering the work, and has focused everyone on how to best spend the money for big results. Because of this, the NWTF will be much more successful in saving the habitat for the long-term sustainability of wild turkeys and a whole suite of associated species."

Focusing habitat enhancement and restoration efforts on the most imperiled landscapes will optimize the NWTF’s ability to deliver conserva-

BENCHMARKS

1.16 million acres at end of 2015
1.76 million acres by end of 2017
4 million acres by end of 2022

10 | Strategic Vision 2016-2022
The NWTF has identified priority areas, called Focal Landscapes, across the country where critical habitat needs exist. Ongoing plans and partnerships are addressing these habitat deficiencies.

Conservation work on the ground while making the greatest impact for the conservation of the wild turkey and other wildlife on public and private lands.

America's Big Six of Wildlife Conservation groups these most imperiled habitats into six regions: America's Southern Piney Woods; America's Mid-South Rebirth; America's Colonial Forests; America's Crossroads; America's Great Open Spaces; and America's Western Wildlands. Specific management objectives implemented at a local-landscape scale within these regions will help to ensure wild turkey populations can maintain long-term stability.

With a growing nation, habitat loss is inevitable. By expanding our use of conservation easements and NWTF-owned properties in each of the Big Six regions, we will increase our ability to prevent habitat loss and demonstrate quality habitat management. At the same time, we must maximize the habitat quality of remaining areas to make up for what is lost.

Partnering with agencies and other organizations to address Big Six priorities, the NWTF is able to drive more conservation work focusing on large-scale habitat deficiencies, such as a lack of forested vegetation, water quality and availability and restoring native prairies and grasslands. This will result in landscape changes favorable for wild turkey and other wildlife species, as well as provide other public benefits, such as improved water quality and soil and water conservation.

Conserving and enhancing the necessary amount of wildlife habitat over the next decade will require strong partnerships, highly focused conservation delivery, a growth in public policy work to educate policymakers, as well as aggressive fundraising to pay for the work.

The goals are big, and the challenges are bigger, but through our volunteers and by working together with our partners, we will achieve our goals to provide quality habitats with huntable populations of wild turkeys for all Americans to enjoy.

*U.S. Census Bureau
PRESERVING OUR HUNTING HERITAGE

VISION: The NWTF will uphold and preserve our hunting heritage by engaging our passionate volunteers to share the culture and lifestyle they cherish through efforts focused on recruitment, retention and reactivation and providing a social support network to new or reactivated hunters.

OBJECTIVE: Create 1.5 million hunters by addressing barriers to participation and opening 500,000 acres to hunter access by 2022.

"Watch that muzzle. Keep it pointed up or away from the other hunters," my best friend's father told me as we pushed through a field overgrown with bleater and switchgrass," remembered Matt Lindler, editor of the NWTF's Turkey Country and JAKES Country magazines. "I was just 16, and the dogs were getting bready as they closed in on a covey of bobwhites on my friend's family farm in South Carolina. That was just one of many memories I have of being taught something important while hunting. It took years for me to realize this, but these lessons helped form me into the person I am today."

Until the 1980s, this type of tutelage was common. If someone wanted to learn how to hunt, they didn't have far to go to find a person to show them the ropes. Today, it's much more difficult to find such mentors.

Declining hunter numbers means a decline in the acceptance of hunting and ultimately could result in the loss of the tradition altogether.

The NWTF is dedicated to this process and is investing in improving the support and volunteer capacity to create a social support network throughout our chapter system to help new and reactivated hunters thrive.

In many areas, the top cause of hunters dropping out is feeling lonely or not fully invested in the sport. Without a family or friend

Finding mentors, instruction, and all of the support needed to convert them into lifelong participants," said Scott Vance, NWTF assistant vice president for Hunting Heritage, "the NWTF has become a leader in R3 and the Hunter Adoption Model."

R3 stands for Recruitment, Retention and Reactivation, and is the process of creating new, lasting hunters who will adopt the traditions as their own.

"I take my role as mentor very seriously," said Keith Fritz, NWTF Save the Hunt coordinator for Massachusetts. "Not everyone is fortunate to grow up with outdoorsmen as strong role models. I enjoy giving opportunities to our future hunters. These hunters will become the next generation of mentors."

The NWTF is dedicated to this process and is investing in improving the support and volunteer capacity to create a social support network throughout our chapter system to help new and reactivated hunters thrive.
DEFINITIONS
R3 — Recruitment, retention and reactivation of hunters
Hunter Adoption Model — The process and distinct stages that a person goes through to become a hunter. The model incorporates about 30 years of hunting, shooting and leisure science research.
American System of Conservation Funding — A user pays, public benefit system of funding, in which hunting license fees and voluntary excise taxes on firearms and ammunition pay for the conservation of all wildlife and its habitats that are enjoyed by all people.
Volunteer Mentor — A role model who engages new hunters, teaching and helping them grow into safe, legal and ethical hunters for life.

"Access to quality habitat and hunting land also is a key factor in declining hunting participation," said Dale Triby, former Bureau of Land Management liaison to the NWTF Technical Committee and retired BLM wildlife biologist. "In eastern Montana, loss of access to quality hunting habitat is the biggest reason people don't hunt.

"The link between hunting, accessibility and habitat is important," Triby said. "Everything hinges on good habitat. If habitat is not accessible to the hunter, they lose interest."

In America, hunters and recreational shooters fuel conservation by providing funds for federal and state wildlife agencies through license sales and voluntary excise taxes on firearms and ammunition. With the drop in hunter numbers comes a drop in funding.

Declining participation also means a decline in the acceptance of hunting and ultimately could result in the loss of the tradition altogether. With that, the state agencies lose their most efficient tool — hunters — to manage the health of wildlife populations.

R3 efforts may be for nothing if we lose our ability to hunt. The NWTF has a long history of removing regulatory barriers to hunting through our participation in Families Afield. To ensure our long-term ability to hunt, we will increase our public policy efforts to influence legislation and regulations that are beneficial to hunting and hunters.

The shooting sports offer a potential gateway to hunting. Many who start off target shooting transition into hunting. These participants have a familiarity with firearms, which can be an obstacle to recruiting new hunters.

Emphasizing shooting sports could serve as a gateway to introduce other demographics to hunting. For example, some research shows that shooting sports serves as a connection to inner city women of color. As the demographics of our country continue to change, the future of hunting depends on these outlooks accepting and participating in hunting.

HUNTERS BENCHMARKS
459,587 hunters at end of 2015
697,535 hunters by end of 2017
1.5 million hunters by end of 2022

ACCESS BENCHMARKS
239,512 acres at end of 2015
195,363 acres by end of 2017
500,000 acres by end of 2022

The NWTF is tracking ahead of schedule and is evaluating expanding the original goals.
BUILDING AN ORGANIZATION FOR THE FUTURE

VISION: The NWTF will focus on long-term organizational growth and stability to ensure efficient mission delivery.

OBJECTIVE: The NWTF will increase annual gross revenues to $82 million and grow adult membership to 225,000 by 2022

“When Tom Rodgers drove from Fredericksburg, Virginia, to Edgefield, South Carolina, to set up the NWTF’s first corporate office in 1973, he arrived with the entire organization stuffed into a cigar box,” remembered John Kemp, founding member and one of the men who convinced Rodgers to make the move.

“That cigar box contained the business documents, what little cash he had, the short roster of members and a vision of doing great things.”

While the NWTF’s resources far exceed the capacity of a cigar box, today, we haven’t forgotten our humble beginnings and Rodgers’ hope to make a difference continues. It is that vision that requires the NWTF to regularly evaluate our direction and make adjustments to adapt to changing needs; thus the development of the Save the Habitat. Save the Hunt. initiative.

The NWTF helped our state and federal agency partners restore the wild turkey to all available habitats in North America, conserve or enhance 17 million acres of wildlife habitat and introduce millions of people to the outdoors. Save the Habitat. Save the Hunt. gave the NWTF a new direction and revitalized our volunteers by giving them focus and specific goals to achieve.

We are well on our way to accomplishing these goals, but there is still a lot to do. For the NWTF to successfully fulfill our Save the Habitat. Save the Hunt. objectives and move beyond them in the future, the organization must continue to grow and strategically invest in ourselves and our ability to deliver on our mission. We must emphasize organizational growth and investment with the same passion we have given to our mission delivery.

REVENUE BENCHMARKS
$64 million* at end of 2015
$67 million by end of 2017
$82 million by end of 2022
*Does not include value of land donations

ADULT MEMBERSHIP BENCHMARKS
165,000 members at end of 2015
181,000 members by end of 2017
225,000 members by end of 2022

#RISEANDFLY
Our save the Habitat. Save the Hunt objectives build on the successes of the prior year. We must accomplish incrementally more acres and hunters each year. This, alone, will take additional funds. While we don’t have to raise all of the money alone, we must bring the first dollars to the table to leverage partnerships.

To ensure the NWTF’s ability to deliver on these goals and to use the initiative as a springboard to launch us into the future, we must achieve annual gross revenues of $82 million by 2022, with a stretch goal of $93 million. As we deliver on our mission, we will do this while maintaining an efficiency ratio better than 80:20.

While we must grow our revenues to be successful, and the NWTF must also grow our adult membership to 225,000 by 2022, with a stretch goal of 250,000. This is not, however, about having a big-number goal. We must grow membership and increase volunteer engagement to deliver on our mission.

Our membership is aging—much like the hunting public and the overall population; we must attract younger members. For the NWTF to be relevant in the future, we must recruit members who more closely match the demographics of our country. For example, our membership is greater than 80-percent male, but the nation is 52-percent female; our membership is 90-percent caucasian, while the country is only 76-percent caucasian.

As we strive to preserve our hunting heritage, we need a strong volunteer base to supply mentors and social support systems. That volunteer base should look like the people we are trying to attract. By attracting people from diverse backgrounds, ethnic groups and ages, we will help keep hunting and conservation relevant and continue to grow the organization.

A strong membership base is helpful for growing partnerships, sponsorships and for the political clout needed to influence conservation- and hunting-related legislation.

The NWTF is in a strong financial position to weather whatever may come. Building an organization for the future, however, means investing in ourselves. We will invest in recruiting and retaining the best talent and skills in volunteers and staff and improve infrastructure and technology resulting in better efficiency and productivity. We also will diversify our fundraising efforts by placing more emphasis on attracting philanthropic giving and actively growing non-banquet revenues.

Doing all of these things, the NWTF will be able to successfully deliver on its mission and the goals of Save the Habitat. Save the Hunt. and more.

DEFINITION
Efficiency Ratio — The ratio used to measure a nonprofit’s efficiency of spending more on its mission.
The North American Model of Wildlife Conservation

Wildlife conservation in the United States is rooted in seven principles that have provided the foundation for success:

- Wildlife is public property
- Science is the basis for wildlife policy
- Hunting and fishing laws are created through a public process
- Everyone has the opportunity to hunt and fish
- Wildlife shall be taken only by legal and ethical means
- Wildlife cannot be slaughtered for commercial use
- Wildlife is an international resource

NWTF

P.O. Box 530
770 Augusta Road
Edgefield, SC 29824

www.nwtf.org
Appendix B
Policy MOU
Memorandum of Understanding
Between the
National Association of State Foresters
And the
National Wild Turkey Federation

This Memorandum of Understanding (MOU) is made and entered into by and between the National Association of State Foresters, a non-profit organization, hereinafter referred to as NASF, and the National Wild Turkey Federation, a non-profit organization, hereinafter referred to as NWTF.

I. Purpose

The purpose of this MOU is to provide a framework (i.e., template) for cooperation and collaboration between NASF and NWTF to support activities that promote active forest management and the conservation of forested wildlife habitat and which benefit the members of both organizations.

State forestry agencies will continue to cooperate individually with NWTF to achieve a variety of successful outcomes. A national template for cooperation between NASF and NWTF will promote, help replicate, and accelerate activities that benefit the nation’s forests and wildlife.

II. Statement of Mutual Benefits and Interest

Both NWTF and NASF recognize that forests provide essential wildlife habitat and active forest management can create and enhance wildlife habitat.

NWTF, a non-profit organization dedicated to the restoration of the wild turkey and the preservation of our hunting heritage, is a recognized leader in wildlife conservation and has local chapters in every state. NWTF members are sportsmen, women and children who care deeply about natural resources and the wild places they love to hunt. Through partnerships with other non-profits along with state and federal agencies, NWTF helped restore wild turkey populations throughout North America. NWTF's “Save the Habitat. Save the Hunt.” ten-year initiative promotes active forest management and conservation of upland habitat and is consistent with NASF objectives.
NASF is a recognized leader in forest conservation and has members in every state. NASF members are the directors of forestry agencies in the states, territories and the District of Columbia of the United States. Through partnerships with federal agencies and non-profit organizations, NASF promotes policies and programs that support forest management and conservation on public and private lands. NASF members employ forestry and natural resource professionals that assist private landowners, manage state-owned forests, and deliver a variety of programs and services consistent with NWTF objectives.

III. Framework for Cooperation and Collaboration

NASF and NWTF agree that a flexible framework for cooperation and collaboration can encourage positive action at all levels – national, regional, and state/local. This framework will promote intentional partnerships that benefit the members of both organizations. The following list represents a menu of options, consistent with each organization’s policies, priorities, and available resources that NASF and NWTF may choose to further develop:

A. Government Affairs

1. Coordinate advocacy for shared federal legislative and policy positions. Examples could include appropriations, Farm Bill and FIA implementation, federal lands management, Wildfire Disaster Funding Act, and ESA reform.

2. Develop templates for state executive orders or legislation.

3. Send issue updates and calls to action to each respective organization’s members and grassroots networks.

4. Create a template that helps NWTF staff, in conjunction with NWTF local chapters, and state forestry agencies work together to plan Congressional field trips.

B. Communications

1. Contribute to each organization’s publications, social media, and online newsletters.

2. Promote success stories of programs that advance shared goals such as the USDA Forest Service Forest Stewardship Program.

3. Coordinate messaging and provide speaking opportunities at national, regional, or state meetings.

4. Share contact lists and assign a NWTF-NASF liaison within both organizations.
5. Develop and publicize data, statistics, images, maps, and conservation performance measures that convey the value of forests for wildlife.

6. Document and communicate the various ways state forestry agencies and NWTF conservation staff, in partnership with local chapters, can work together.

7. Develop joint press releases or public statements targeting policymakers.

8. Develop co-branded materials targeting landowners.

C. On-the-Ground Work

1. Document examples of how shared state/NWTF positions work so other states can learn how to extend capacity through shared positions.

2. Develop "how to" materials to guide NWTF conservation staff and state forestry agencies on how to propose and implement Stewardship Contracting projects and Good Neighbor Agreements on National Forests.

3. Conduct landowner education initiatives that promote forest management for wildlife and the services of both state forestry agencies and NWTF:
   i. Create a template that helps NWTF staff and state forestry agencies work together to plan landowner field days.
   ii. Identify situations where NWTF's revamped private lands model could be complementary to existing state private lands programs.

4. Propose pilot projects and targeted federal funding in areas where state Forest Action Plans and NWTF Big 6 Focal Landscapes overlap.

IV. NWTF will endeavor to:

A. Assign a designated liaison to NASF.

B. Provide opportunities to bring together NWTF, NASF, state forestry agency representatives, and other partners (where appropriate). If this includes a NWTF-sponsored Forestry Advisory Panel, it will serve as a principal venue for partnership development under this Framework for Cooperation and Collaboration.

C. Facilitate mutually beneficial communications and coordination at the national, regional, and state levels.

D. Contribute images, articles, or success stories to NASF illustrating partnerships between state forestry agencies and NWTF chapters.
V. **NASF will endeavor to:**

A. Assign a designated liaison to NWTF.

B. Encourage state forestry agencies to participate in appropriate NWTF forums including a NWTF forestry advisory committee should one be developed.

C. Invite NWTF participation in relevant NASF meetings, forums, or projects.

D. Facilitate mutually beneficial communications and coordination at the national, regional, and state levels.

E. Share photos from the NASF photo library to NWTF upon request and free of charge with appropriate NASF attribution. Contribute articles and success stories to NWTF for use in NWTF’s bi-monthly magazine, website, etc.

VI. **It Is Mutually Agreed And Understood By And Between NASF and NWTF That:**

A. **RESOURCES.** NWTF and NASF will handle their own activities and utilize their own resources, including the expenditure of their own funds, in pursuing these objectives. Each party will carry out its separate activities in a coordinated and mutually beneficial manner. Activities requiring shared financial or significant staff resources will be agreed to in advance under separate agreements.

B. **NON-FUND OBLIGATING DOCUMENT.** This MOU is neither a fiscal nor a funds obligation document. Any endeavor or transfer of anything of value involving reimbursement or contribution of funds between the parties to this instrument will be handled in accordance with applicable laws, regulations, and procedures including those for Government procurement and printing. Such endeavors will be outlined in separate agreements that shall be made in writing by representatives of the parties and shall be independently authorized by appropriate statutory authority. This instrument does not provide such authority.

C. **PARTICIPATION IN SIMILAR ACTIVITIES.** This MOU in no way restricts the parties from participating in similar activities with other public agencies, private organizations, and individuals.

D. **MODIFICATION.** Modifications within the scope of the MOU shall be made by mutual consent of the parties, by the issuance of a written modification, signed and dated by all parties, prior to any changes being performed.

E. **COMMENCEMENT/EXPIRATION DATE.** This MOU is executed as of the last date shown below and expires on September 30, 2017 at which time it will be subject to review, renewal, or expiration.
F. TERMINATION. Either party, in writing, may terminate this instrument in whole, or in part. The party that desires to terminate this instrument must notify the other parties a minimum of 60 days prior to a termination date.

G. COMMUNICATION. Any press release concerning this MOU that is released by one party shall be shared with the other party prior to release.

H. RESPONSIBILITY. This MOU is not intended to, and does not create, any right, benefit, or trust responsibility, substantive or procedural, enforceable at law or equity, by a party against the National Wild Turkey Federation or the National Association of State Foresters, its officers, its staff, or any directors of forestry agencies in the states, territories and the District of Columbia.

J. The principal contacts for this instrument are:

National Wild Turkey Federation

National Association of State Foresters

V. Signature

VII. Signatures

IN WITNESS WHEREOF, the parties hereto have executed this MOU as of the last written date below.

National Wild Turkey Federation

August 17, 2015

Date

National Association of State Foresters

August 17, 2015

Date
Appendix C

Phase 1: National Office Interview Protocol/Guide
Phase 1

National Office Interview Protocol/Guide Date

Script

Welcome and thank you for your participation today. My name is Emma Powell and I am Ph.D. student at Western Michigan University conducting my primary research to complete my dissertation in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Public Administration. This interview will take about 60 minutes and will include questions regarding your experiences, understandings, perceptions, and expectations of the national office and of the local branch offices. I consider you the expert at your work so there are no wrong answers to the following questions. It may be most helpful to think of specific examples and focus on those details versus a high-level overview of alignment.

I would like your permission to record this interview, so I may accurately document the information you convey. If at any time during the interview you wish to discontinue the use of the recorder or the interview itself, please feel free to let me know. All of your responses are confidential. Your responses will remain confidential and will be used to develop a better understanding of how the local offices align with the expectations of the national office using five indicators of alignment measure.

Do you have any questions before we begin?

Demographic Questions:

What is your title and a brief job function description?

How long have you been at the national office?

How long have you been with the organization?

What role did you serve in the organization prior to HQ role (if applicable)?

Organizational Framework:

Tell me about the procedures of information/expectation dissemination to local offices.

Discuss the breadth of freedom that local branch offices have to make decisions regarding management of resources? Local/statewide decision-making power, etc.?

The 5 variables we are using to better understand alignment are fundraising, volunteer/community engagement, HR/operations, program development/implementation, PR/external communication. The remaining questions will focus on those areas specifically. You may not be an expert in all of
these areas—however, as a senior leader you are aware of each one’s importance and I would value your insights regardless of your personal leadership scope.

**Fundraising Expectations:**

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

What does the local office have to do for the national office to perceive the local as successful in fundraising?

  How is that communicated?
  How is that tracked?
  What is your “feeling” of the local success?

* What percentage of the line items hit their goals (traditionally?)

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

**Volunteer/Community Engagement:**

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

What does the local office have to do for the national office to perceive the local as successful in volunteer and community engagement?

  How is that communicated?
  How is that tracked?
  What is your “feeling” of the local success?

**HR/Operations:**

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

What does the local office have to do for the national office to perceive the local as successful in HR/Operations?

  How is that communicated?
  How is that tracked?
  What is your “feeling” of the local success?
Program Development/Implementation

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

What does the local office have to do for the national office to perceive the local as successful in program development?
  
  How is that communicated?

  How is that tracked?

  What is your “feeling” of the local success?

PR/External Communication/Social Media

On a scale of 1-5 (1 is lowest 5 is highest) how much does this subject pertain to your oversight?

What does the local office have to do for the national office to perceive the local as successful in external communication?
  
  How is that communicated?

  How is that tracked?

  What is your “feeling” of the local success?

WRAP UP QUESTIONS:

Do you think that local alignment is a concern?

What is your current local office evaluation method?

Has this been a priority or an identified need?

Would you say success in any of these above categories is determined monthly, quarterly, annually or over an extended period (3-5 yr comparison?)

Can you share anything else with me regarding national/local expectation alignment?

CLOSING:

Thank you so much for sharing. I appreciate your time.
Appendix D

Phase 2: Email Interview Protocol/Guide
Phase 2

Email Interview Protocol/Guide

Date ______________________

Welcome and thank you for your participation today. My name is Emma Powell and I am Ph.D. student at Western Michigan University conducting my primary research to complete my dissertation in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Public Administration. This interview will take about 60 minutes and will include questions regarding your experiences, understandings, perceptions, and expectations of the national office and of the local branch offices.

I consider you the expert at your work so there are no wrong answers to the following questions. It may be most helpful to think of specific examples and focus on those details versus a high-level overview of alignment.

If at any time during the interview you wish to discontinue the interview please feel free to let me know. All of your responses are confidential. Your responses will remain confidential and will be used to develop a better understanding of how the local offices align with the expectations of the national office using five indicators of alignment.

Demographic Questions:

What is and how long have you been in your current staff role at NWTF?

What, if any, roles have you served with NWTF and how long did you serve in those roles?

How many years’ experience do you have in the nonprofit sector?

(If applicable) How many years’ experience do you have in the conservation, in any capacity?

(If applicable) How many years’ experience do you have in development/fundraising?

Organizational Framework:

Tell me about how you believe staff receive information from the national office.

Discuss the breadth of freedom that you have to makes decisions regarding management of resources and activities.

From your perspective, where is the decision-making authority for the organization housed?
Fundraising Expectations:
Are success measurements clearly defined and communicated from national for fundraising goals?

- What training do you receive to meet these expectations?
- What is the budget/Is there a budget to cultivate donors?
- What is your “feeling” of the local success? How often are goals met?

Volunteer/Community Engagement:
Are success measurements clearly defined and communicated from national for community engagement? (Board involvement, committees, outreach, event, office opp.)

- What training do you receive to meet these expectations?
- What is the budget to cultivate volunteers?
- What is your time allowance to cultivate volunteers? (Is that institutionalized?)
- What is your “feeling” of the local success?

HR/Operations:
Are success measurements clearly defined and communicated from national for human resources?

- What resources does national provide for HR success?
- What is your time allowance for onboarding and staff development?
- What is your “feeling” of the local success?

Mission Delivery
Are success measurements clearly defined and communicated from national for mission delivery?

- What training do you receive to meet these expectations?
  - How effective and from where is this training?
- What is the budget to implement mission delivery expectations?
- What is the time allowance and priority of mission delivery?
- What is your “feeling” of the local success?

PR/External Communication/Social Media
Are success measurements clearly defined and communicated from national for PR/External Communication?
What training (policies) do you receive to meet these expectations?

How effective and from where is this training?

What is the budget to implement communication strategies?

How much time and priority do you allow for external communication (with a separate “agenda” than fundraising)?

Do you have prepared local and national messages (30 second elevator speech-type) to promote the mission? Explain, if needed.

What is your “feeling” of the local success?

WRAP UP QUESTIONS:

Are expectations/success measures clear and attainable?

Do you think that local alignment to national expectations is a concern?

Do you feel like national evaluates your performance with any other indicators beyond dollars?

Can you share anything else with me regarding national/local expectation alignment?

CLOSING:

Thank you so much for sharing. I appreciate your time.
Appendix E

Phase 3: All Staff Survey
Welcome and thank you for your participation. The National Wild Turkey Federation (NWTF) has agreed to participate in this case study to better understand mission alignment between the regional and national offices. NWTF employs approximately 260 staff across the country and all staff are invited to participate in this confidential web-based survey. In this research, "mission alignment" is defined as a shared commitment to the organization’s purpose as well as a shared understanding of the behaviors, outcomes, and measurement of the regional offices compared to the expectations and communication of the national office in the areas of fundraising, mission delivery, volunteer structures/community engagement, public relations/external communication, and operations/human resources. Please read this consent information before you begin the survey.

You are invited to participate in a research project entitled "ALIGNING NATIONAL NONPROFIT EXPECTATIONS WITH REGIONAL/LOCAL EFFORTS TO SERVE THE MISSION" designed to illustrate behaviors, outcomes, and metrics that support or contradict a shared understanding of the expectations between national and regional offices. The study is being conducted by Emma Powell (Ph.D. candidate) and Dr. Matthew S. Mingus from Western Michigan University’s School of Public Affairs and Administration. This research is being conducted as part of the (thesis/dissertation) requirements for Emma Powell. This survey will take approximately 15-20 minutes to complete. Your replies will be anonymous. When you begin the survey, you are consenting to participate in the study. If you do not agree to participate in this research project simply exit now. If, after beginning the survey, you decide that you do not wish to continue, you may stop at any time. If you have any questions prior to or during the study, you may contact Dr. Mingus at matthew.mingus@wmich.edu or Emma Powell at 616-337-9631 or emma.a.powell@wmich.edu. Participating in this survey online indicates your consent for use of the answers you provide. Thank you very much for your time and support. Emma A. Powell

Please start with the survey now by clicking the "I Agree" button below.

2. I have worked for the National Wild Turkey Federation for: (Example: 2y 3m)

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3. My professional level within the organizational hierarchy is
1. Staff
2. Manager
3. Senior Executive
4. Other
4. The skills that are most important to my job, in rank order are (1 is highest, 6 is lowest):
   - Customer Service _________
   - Financial __________
   - Sales/Fundraising __________
   - Conservation __________
   - Volunteer Management _________
   - Communication _________

5. To what extent do you agree or disagree that you have a shared understanding (see introduction for definition) of key characterizations of the metrics that have been given to you by Senior Leadership? (i.e. what is the organizational definition of a “hunter” when you measure how to increase them?)

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6. To what extent do you agree or disagree that there is a shared understanding of what effective communication means across the organization?

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7. To what extent do you agree or disagree that there is a shared commitment with executive leadership, senior management, and staff to the mission of the organization?

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8. How do you receive organizational information? (Check all that apply)
   1. Email from CEO or senior leadership
   2. Email from local/regional leadership
   3. Informal communication with peers or supervisor
   4. Communications team
   5. I don’t
   6. Other

9. To what extent do you agree or disagree that the directions you receive (from all levels of the organization) are clear, concise, and next steps are understood?

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10. To what extent do you agree or disagree that you have the appropriate amount of decision-making authority for your job?

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11. To what extent do you agree or disagree that you have freedom and support to do your job as you see appropriate?

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12. To what extent do you agree or disagree that NWTF’s fundraising strategies and expectations allow for flexibility and creativity to attain goals?

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13. To what extent do you agree or disagree that the regional offices focus on the national mission statement when seeking to raise funds?

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14. To what extent do you agree or disagree that mission-specific talking points are distributed by national to strengthen regional fundraising efforts?

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15. To what extent do you agree or disagree that the tools you need to promote and advocate on behalf of NWTF are available and easily accessible?

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16. To what extent do you agree or disagree that NWTF employees have a shared agreement on the expectations of a communication/marketing plan?

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17. To what extent do you agree or disagree that NWTF’s communication/public relations efforts and expectations allow creativity and flexibility to create region-specific external messaging opportunities?

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18. To what extent do you agree or disagree that the regional sites share stories of success with the national office/communication team?

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19. To what extent do you agree or disagree that the national office shares stories of success with regional employees?

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20. To what extent do you agree or disagree that there is a standard/approved “30 second elevator pitch” that highlights the NWTF’s work across multiple focal landscapes?

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21. To what extent do you agree or disagree that NWTF’s brand identity is a critical piece of the organization’s message?

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22. To what extent do you agree or disagree that the national office creates volunteer policy that fits the needs of the regional office, given their local conditions?

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23. To what extent do you agree or disagree that the expectations of volunteer engagement, designed by the national office, are understood by all employees?

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24. To what extent do you agree or disagree that regional offices develop volunteer opportunities that fit the needs of the community?

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25. To what extent do you agree or disagree that employees are trained in volunteer engagement to generate opportunities for members to engage with NWTF at multiple levels of interest?

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26. List the top 3 qualities you believe are important in a NWTF volunteer.

27. To what extent do you agree or disagree that human resource practices and expectations, designed by the national office, are understood and accepted by employees?

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28. To what extent do you agree or disagree that the regional offices develop local operations practices that fit the needs of the community?

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29. To what extent do you agree or disagree that the national office provides training to staff?

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30. Types of training offered?


Types of training interested in?


31. To what extent do you agree or disagree that the NWTF organizational chart is clear and easily located?

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32. To what extent do you agree or disagree that the Chapter Manual is relevant to your position?

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<th>Strongly Agree</th>
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33. To what extent do you agree or disagree that the development of the 2016 Chapter Manual included your insights?

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34. To what extent do you agree or disagree that the national office uses multiple communication channels to express clearly defined mission delivery expectations to you?

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35. To what extent do you agree or disagree that regional office employees understand the expectations of mission delivery?

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36. What is the mission of the organization? (SELECT 1)
   1. Save the Hunt, Save the Habitat
   2. Turkeys Forever
   3. Save the Habitat, Save the Hunt
   4. Conservation of the wild turkey and preservation of our hunting heritage
   5. Conserve, restore, and manage associated habitats for turkeys
   6. Other

37. To what extent do you agree or disagree that mission delivery programs should be created/implemented throughout the country to best fit a local need?

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38. Which mission-critical program delivery does your office encourage, promote, and/or support? (SELECT ALL THAT APPLY)
   1. Turkey Hunters Care
   2. Jakes
   3. Women in the Outdoors
   4. Wheelin Sportsman
   5. Hunting Heritage Events
   6. Conservation programs
   7. Hunter Education Programs
   8. Research (wild turkey or management)
   9. Education material (Turkey Education Box)
   10. Scholarship Program
   11. Habitat work
   12. Access projects
   13. Land Acquisition
   14. Conservation easements
   15. Seed programs
   16. Purchasing equipment for agencies or law enforcement
   17. Other __________

39. I am based at:
   1. The national office
   2. A regional office

40. Regional Staff: On average, how often do you work with your regional counterpart (Regional Biologist/Regional Director)?
   1. Less than 1x a month
   2. 1x a month
   3. 2x a month
   4. 1-3x a week
   5. Daily
   6. Not Applicable
   7. Other __________
41. To what extent do you agree or disagree that intra-organizational dialogue occurs at all levels of the organization and is not restricted to a vertical chain of command communication?

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42. To what extent do you agree or disagree that NWTF executive leadership, management, regional offices, and staff are transparent in all expectations and outcomes within the organization?

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43. To what extent do you agree or disagree that a shared understanding of all goals, metrics, and expectations is critical to the success of the NWTF?

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Appendix F

CEO Introduction Email to Phase 2 Participants
As a valued member of the NWTF team you have been selected to participate in a case study of the NWTF which strives to better understand local chapter alignment to national mission expectations.

Below is a brief bio on Emma Powell, who is conducting this case study and she will be reaching out to each of you via email in the next few days seeking your input.

**Emma Powell** joined the Department of Political Science and Public Administration at Central Michigan University in 2015. She brings a scholarly focus in nonprofit organizations, policy development and implementation. Her expertise is in organizational leadership and management as both a “pracademic” and scholar. Emma is A.B.D. (All but Dissertation) from Western Michigan University. Her dissertation work centers on corporate nonprofit infrastructure design and behavior. Additionally, she has earned a Master of Management degree from Aquinas College. Prior to her faculty position, Professor Powell served in executive director and administrative roles at local offices of national nonprofit organizations including Susan G. Komen for the Cure, the American Heart Association, and the American Lung Association of Michigan.

I encourage each of you to approach the questions posed with careful deliberation and openly provide your thoughts on areas in which you feel we excel and areas where you feel we have opportunities to improve. The confidentiality of all responses will be protected.

Thank you in advance for participating in this survey and for your continued commitment and dedication to the NWTF and our mission.
Appendix G
CEO Introduction Email to Phase 3 Participants
From: George Thornton <gcthornton@nwtf.net>
Date: August 22, 2016 at 2:04:48 AM EDT
To: Emma A Powell <emma.a.powell@wmich.edu>
Cc: Cathy Marks <cmarks@nwtf.net>
Subject: Re: NWTF Alignment Survey (Question Review)

This week you will receive an email from Emma Powell. Ms. Powell is a PH.D. Candidate. As part of her dissertation, she is conducting a survey which is focused on evaluating how well we communicate and share our Vision and Mission externally.

It is extremely important that each of us complete this survey in a timely manner and return it to Ms. Powell.

Please be assured that your responses will be held in confidence.

Thank you for cooperating in this important survey.

George
Appendix H

Organization Participation Letter
April 22, 2016

Matthew S. Mingus, Ph.D.
Professor and Doctoral Director
School of Public Affairs and Administration
Western Michigan University
220 E Walwood Hall
1903 W. Michigan Ave.
Kalamazoo, MI 49008-5440

Dr. Mingus,

This letter shall serve as the National Wild Turkey Federation’s (NWTF) agreement to participate in the research being conducted by Emma Powell for her Ph.D. requirements and more specifically, as a single case study for her dissertation.

NWTF agrees to grant access to Emma Powell as it relates to organization infrastructure, design, job functions, and staff relations. The organization will provide access to the email list for staff as it is related to the research purpose. The number of employees to be interviewed is open to the needs of Ms. Powell and the electronic survey will be made available to the full staff (nationwide).

NWTF understands and agrees that this research will be done in connection with the dissertation requirements and both Emma Powell and her dissertation committee members (3) will have access to any data and analysis developed through this research project.

NWTF requests that confidentiality of its employees be maintained and that no individual names or individual titles be detailed in the dissertation. We understand the NWTF name will be identified in the dissertation, but request the right to remove our name from publication following completion the dissertation.

The preferred timeframe that we have discussed is:

Phase 1 of National level interviews: May/June 2016
Phase 2 of Local level leadership interviews: June/July 2016
Phase 3 of full staff electronic survey: August/September 2016
Presentation of findings (as applicable) to NWTF full staff and board during October 2016 meeting

We look forward to working with Emma Powell and reviewing the results of her work.

Sincerely,

George C. Thornton
Chief Executive Officer

National Wild Turkey Federation
P.O. Box 530 • 770 Augusta Road • Edgefield, South Carolina 29824 • Phone: (803) 637-3106 • Fax: (803) 637-6034
www.nwtf.org
Appendix I

HSIRB Approval
Date: May 16, 2016

To: Matthew Mingus, Principal Investigator
Emma Powell, Student Investigator for dissertation

From: Amy Naugle, Ph.D., Chair

Re: Approval not needed for HSIRB Project Number 16-05-20

This letter will serve as confirmation that your project titled “A Corporate Model: Aligning National Nonprofit Expectations with Local Efforts to Serve the Mission” has been reviewed by the Human Subjects Institutional Review Board (HSIRB). Based on that review, the HSIRB has determined that approval is not required for you to conduct this project because you are not collecting personal identifiable (private) information about individual and your scope of work does not meet the Federal definition of human subject.

45 CFR 46.102 (f) Human Subject

(f) Human subject means a living individual about whom an investigator (whether professional or student) conducting research obtains

(1) Data through intervention or interaction with the individual, or
(2) Identifiable private information.

Intervention includes both physical procedures by which data are gathered (for example, venipuncture) and manipulations of the subject or the subject's environment that are performed for research purposes. Interaction includes communication or interpersonal contact between investigator and subject. Private information includes information about behavior that occurs in a context in which an individual can reasonably expect that no observation or recording is taking place, and information which has been provided for specific purposes by an individual and which the individual can reasonably expect will not be made public (for example, a medical record). Private information must be individually identifiable (i.e., the identity of the subject is or may readily be ascertained by the investigator or associated with the information) in order for obtaining the information to constitute research involving human subjects.

"About whom" – a human subject research project requires the data received from the living individual to be about the person.

Thank you for your concerns about protecting the rights and welfare of human subjects.

A copy of your protocol and a copy of this letter will be maintained in the HSIRB files.
Appendix J

NWTF Chapter Manual
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**Our Mission**  
The NWTF is dedicated to the conservation of the wild turkey and the preservation of our hunting heritage.
Welcome And Congratulations

By expressing your interest in helping start or manage a local chapter of the National Wild Turkey Federation you have also indicated your commitment to support wildlife habitat conservation and pass hunting traditions on to future generations. We thank you for the commitment to our mission.

Our Vision

More habitat, more wild turkeys, more places to hunt.

Our Mission

The NWTF is dedicated to the conservation of the wild turkey and the preservation of our hunting heritage.

Our History -
North America’s Greatest Conservation Success Story

Founded in 1953, the NWTF is the story of what many believe to be the greatest conservation success story in the history of the wild turkey. Wild turkeys were on the brink of extinction in the early 1900s, having faced decades of habitat destruction and overhunting. As late as the Great Depression, fewer than 30,000 wild turkeys remained in the United States. A group of dedicated hunters helped change that trend, and hundreds of thousands of NWTF volunteers and members followed suit. Today, the wild turkey population across the continent is estimated at just over 5 million.

The NWTF Success Story is a powerful one. Over its first 40 years, this organization has conserved over 1 million acres of upland habitat, investing over $400 million generated through membership dues, chapter-run Hunting Heritage Banquets, and partnerships.

Our Future - Save the Habitat. Save the Hunt.

Built upon this foundation of success, the NWTF now embarks on an even greater challenge than the restoration of the wild turkey with its Save the Habitat, Save the Hunt initiative. The future of hunting and wildlife conservation depends on the organization’s ability to conserve or enhance 4 million acres of the most critical upland habitat, create new hunting opportunities for more than 3 million hunters and open an additional 500,000 acres to public hunting. Save the Habitat. Save the Hunt. will be North America’s next greatest conservation success story, and you are helping make that possible.

SAVE THE HABITAT.
SAVE THE HUNT.

NWTF
A Successful Hunting Heritage Banquet

A successful NWTF Hunting Heritage Banquet starts with a well-built volunteer committee. The success of our chapter and our hunting heritage depend on our circle of influence. The more circle we add to our committee, the brighter that future looks.

NWTF banquet schedules should avoid holidays, sporting events, and other major activities. Tuesdays and Thursdays are good weekdays to avoid conflicts. Successful events can be held throughout the year, but try to limit yours to spring.

For best results in planning and executing your banquet, delegate responsibilities throughout the committee to share in the load and keep everyone engaged. The larger your committee, the better your banquet will be.

Hunting Heritage Super Fund

The NWTF is supported by numerous members and patrons. The Hunting Heritage Super Fund is an integral part of the organization’s ability to spend millions of dollars annually on the conservation of critical upland habitat and the protection of North American hunting heritage. The net revenue, after expenses, from a Hunting Heritage Super Fund banquet is reserved for wild turkey and wildlife programs. Upon completion of your Hunting Heritage Banquet, and payment of local expenses, the NWTF redirects merchandise and administrative expenses, such as state and local sales tax and credit card processing fees. The remainder is split as follows:

- State Super Fund: 80%
- Host Chapter: 10%
- State Chapter: 5%
- National Projects: 5%

Starting An NWTF Chapter

Forming a chapter is important to the success of the mission of the NWTF. Recruiting and developing the chapter committee are the keys to successful banquets and hunting heritage events. The more committee members on board, the more successful the chapter will be.

NWTF staff is here to help

The NWTF has a professional staff and headquarters support to guide you and ensure successful events, activities, and conservation projects.

Regional Directors (RDs) are your primary staff contacts with the NWTF. RDs are tasked with overseeing all local chapter activity within a given region.

As directed by the NWTF Board of Directors through the Chief Executive Office, RDs serve as local agents for the NWTF in your area. All NWTF event plans, activities, and operational follow-through must be coordinated and approved by them. Their role is to ensure your events are properly planned, supported, and executed.

Regional Directors (RDs) are responsible for the coordination of conservation projects and the delivery of conservation dollars. RDs also generate additional revenue for the organization through various partnerships and conservation projects.

The headquarters support staff are available in Edgewood, South Carolina, to ensure the NWTF continues to operate effectively and efficiently on the national level.
Chapter Goals, Purposes and Powers

Goals

The goals of NWTF chapters are to:

- Promote public awareness of, and support for, the conservation of upland habitat and the wise management of the wild turkey and other wildlife.
- Assist with programs to protect and improve habitat and increase numbers and distribution of the wild turkey.
- Promote the preservation and growth of hunting traditions.
- Foster cooperation among individuals, organizations and companies on national, state and local levels to accomplish the NWTF's goal.

Purposes

The purposes of the chapter according to Section 501(c)(3) of the Internal Revenue Code are to:

- Establish, maintain and promote public interest in the management, protection and restoration of the wild turkey through NWTF fundraising and hunting heritage events and member recruitment.
- Develop, preserve, restore and maintain wild turkey populations and their habitats.
- Support, encourage and assist wild turkey research.
- Acquire, store and disseminate biological information on the wild turkey.
- Give and promote entertainment, lectures and exhibitions for the general public and members of the NWTF.
- Promote the preservation and growth of hunting traditions.
- Do all things necessary and proper to further stated goals, consistent with the exclusively educational and non-profit nature of the NWTF.

Powers

An NWTF chapter operates exclusively for charitable, scientific and educational purposes as defined in the United States Internal Revenue Code and may engage in all lawful activities incidental to the goals and purposes, except as restricted herein. The chapter shall not have the power to exercise any right or power or take any action that will create a financial liability on the NWTF without prior approval.

Organizing A Chapter

Application For Affiliation and Letter of Acceptance

Any person wishing to form an NWTF chapter shall submit an Application For Affiliation and Letter of Acceptance to the regional director (RD) for review and submission for approval by the NWTF National Board of Directors (see supporting documentation section).

- Hold an organizational meeting and elect officers.
- Prepare and submit an Application For Affiliation and Letter of Acceptance to the regional director (RD) for review and submission for approval by the NWTF National Board of Directors (see supporting documentation section).
- Conduct and finalize an annual NWTF Hunting Heritage Banquet that contributes to the state Super Fund.

Upon completion of the above requirements, the NWTF Board of Directors may issue the chapter a provisional charter. As specified in the Application for Affiliation, each chartered chapter must conduct a Hunting Heritage Banquet be

between Sept. 1 and Aug. 31 each year to attain that affiliation as a chartered chapter of the NWTF. Should the chapter fail to conduct an annual banquet at some point the chapter decides to discontinue operation, all financial and physical assets of the chapter must be turned over immediately to the NWTF.

Election of Officers and Terms of Office

The chapter will elect four officers — president, banquet chair, secretary and treasurer.

Chapter officers serve at the pleasure of the committee. All chapter meetings and activities are governed by Robert's Rules of Order and include election of officers and approval of motions. The president, banquet chair (vice president), secretary and treasurer shall be elected at the organizational meeting and, or at an annual meeting by simple majority vote of the committee. All chapter officers should report and become familiar with the NWTF's state and national constitutions. Your RD can provide copies of these documents.

The terms of office for the officers shall commence following the election and at the close of that meeting at which he or she is elected and shall continue until the terms of officers expire for a term of two years. The committee shall conduct an election every two years. Current officers do not have mandatory term limits. They may be re-elected to serve indefinitely. However, it is advisable that the chapter rotate officers every two to four years with the banquet chair stepping up to the presidency, electing a new banquet chair, etc., which will help eliminate burnout and ensure continuation of the chapter in the event of the loss of leadership.

Duties of the President

The chapter president shall preside at all meetings of the chapter, as well as keep the minutes, if a member of the RD and national staff. Supervise the affairs of the chapter and work closely with those he or she shall appoint committee members and chairs of subcommittees. The president, together with any other officer, shall have the power to act, unless otherwise prohibited, in the name of the chapter. All contracts, agreements and other documents to conduct activities and assume or assume a normal course of business as authorized generally, or specifically by the RD or NWTF management.

Banquet Chair Duties

The banquet chair works closely with the chapter president and the regional director on the following:

1. Supervises the banquet team.
2. Appoints subcommittee chairs and distributes committee duties to the appropriate chairs.
3. Coordinates activities between the committees.
4. Coordinates the services of effective raffle ticket sales people (one for every 100 adult guests) to sell raffle tickets during the social hour to assist with the display and delivery of raffle prizes and auction items later in the program.
5. Checks the status of tickets.
6. Confirms that signed copies of PLE are sent to the RD. A signed copy must be sent prior to any nightclub to the PPL dealer.
7. Obtains liquor license (if applicable).
8. Obtains raffle license (if applicable).
9. Involve event VIPs, dignitaries and state game and fish department heads.

www.nwtf.org 5
Monitor and set goals of the ticket sales, sponsorships and acquisition of donations.

Select a program format, keeping introductions at a minimum.

Work with auction and prize chair to write the text for the program. The program should include committee names, donor names, sponsor names, auction list and a thank you message.

Arrange for the printing of the program.

Encourage use of business cards to purchase tickets for an exotic table. Friends and clients can sit together, producing competitive bidding with other tables.

Act as emcee at auction and thank everyone for his or her contribution and contributions.

Keep dinner on the proper timetable and close according to schedule.

Call a follow up meeting of the team within two weeks after the event. Make sure all bills are paid and proceed as sent to the NWT in the business report. Communicate with your NWT and district director.

Secretary Duties

The secretary shall act as event coordinator of all meetings at the chapter and shall keep the minutes of all meetings on file. He or she shall have charge of all lists, records, books, documents and papers for the chapter as appropriate. These records should include minutes of all chapter meetings, up-to-date copies of state bylaws, 501(c)(3) chapter affiliation documents, chapter charter, EPT form and unassigned banquet reports. The secretary shall maintain a record containing the names of all committee members and verify their NWT membership annually. Such record shall include the member's place of residence, telephone number, electronic mail address and NWT membership number and expiration. This list should be shared annually with the NWT through the regional director. He or she shall perform all duties contained in the position of secretary and perform such other duties as assigned to him or her by the committee.

Treasurer Duties

Note: The president may not serve as a member of the board. The president and treasurer shall have no financial involvement or business interest in any of the programs or events associated with this position. The treasurer should own a 501(c)(3) chapter or be an officer of the president and treasurer.

The treasurer should be a member of the board. The treasurer is responsible for the appropriate allocation of funds and the distribution of funds to the chapter. The treasurer is responsible for maintaining an accurate, up-to-date record of all sales and donations prior to the event.

Record membership status, accounts receivable from ticket sales, etc.

Pay all bills for the banquet, including supplies, rentals and any other expenses.

Create and maintain a budget for the banquet, including all expenses and revenue sources.

Prepare and submit a banquet charge card report to headquarters, along with the settlement and totals report from the credit card machine. This amount will be credited to your account. If additional charges are incurred, the member must provide proof of payment.

At the conclusion of the event, keep a minimum of two people count all cash, checks and credit card receipts, record this information on the cash count sheet and return the count to the RD and chapter president's signature.

Provide detailed revenue numbers and ticket/membership numbers to the RD.

The banquet financial report should be prepared as soon as possible to avoid mistakes. We recommend the report be prepared within five days of the event date. The RD has the sole right to examine the report as it is available to the RD in the preparation of the financial report.

The following should be included in all reports:

- Make a copy of all items in the pocket as well as any data that is not used in the report.
- Make a copy of all items in the packet and all data that is not used in the report.
- Make a copy of all items in the pocket as well as any data that is not used in the report.

A completed banquet report must be postmarked within 30 days and mailed to:

- National Wild Turkey Federation
- PO Box 530
- Effingham, SC 29824
- Attn: Banquet Coordinators

- You will receive a gift if the financial package is complete and postmarked within 30 days and achieves $5,000 or more in event revenue, less membership cost.

- Upon receiving the completed banquet report and the NFTR, the RD will be notified and will receive a check for $1,000, or if the event is a successful one, the RD will receive $1,000, or if the event is a successful one, the RD will receive $1,000.
Chapter/Banquet Subcommittee Duties

Ticket Chair Duties
- Coordinate with RD to set ticket pricing, including sponsor and table ticket pricing.
- Complete your ticket order with RD, indicating estimated attendance.
- Order event invitation from NWTF.
- Issue tickets to committee members and record them on a ticket control sheet. Most banquet tickets are sold face-to-face.
- An “early bird” program is suggested to encourage advance sales by mail. Committee members should also sell early bird tickets.
- Submit and account for money and membership to the treasurer as tickets are sold.
- Call in unsold tickets at a cutoff date previously agreed upon, usually five days prior to banquet.
- Assist in the preparation of final membership lists.

Special Note: The ONLY tickets sold are one for which you have received payment. Use caution when guaranteeing more meals than you have sold prior to the dinner. The greatest risk to a successful banquet is over-purchasing meals.

Sponsor Chair Duties
- Coordinates banquet committee’s efforts to sell sponsorships.
- Sets the sponsor member goal for the banquet. Uses incentive gift handout and leads the committee discussion to reach the goal.
- Draft list of sponsor membership benefits to assist committee members with their sponsor membership sales.
- Encourage committee members to sell sponsorships if they have sponsor membership sales.
- Coordinate the development of a “sponsor list.”
- Report the status of sponsor ticket sales at each meeting. Provide time for individual committee members to report on their sponsor solicitation activities.
- Plans special activities and privileges for sponsors including:
  - Special banquet nametags with NWTF sponsor ribbons.
  - Including sponsors’ names in printed program.
  - Verbal recognition and thank sponsors at the banquet.

Sponsor Member Benefits
- The following are benefits for sponsors who sign up at local banquets:
  - Sponsor incentive of the year
  - Sponsor pin
  - Sponsor decal
  - Sponsor membership card
  - Membership to the NWTF Foundation magazine
  - Admission to and special recognition at banquet

Local options to consider:
- A special “thank you” dinner and fellowship night several months before or after the banquet.
- Name included in sponsor-only drawings for confusion at the local banquet.
- Special “thank you” dinner.
- The chapter may offer any additional benefit to their local sponsor choosing Stay within your financial bound.

Auction and Prize Chair Duties
Your NWTF RD will obtain machinery for the auction and raffle from NWTF headquarters in Easley, South Carolina. In addition, the following should be led by the auction and prize chair:
- Acquire door prize donations to help promote ticket sales.
- Lead the committee’s efforts to get quality donations to boost the live and silent auction at your event.
- Acquire raffle prize donations.
- Develop your banquet raffle plan in concert with your RD and committee.
- Add additional donations and underwriting to make your event more efficient.
- At the event, closely supervise the execution of the raffle and the auction.

Arrangement Chair Duties
- Develop a room diagram showing table arrangement, location of tables for prime displays, ticket sales, admission, etc., and secure reservations for all dinner pads.
- Secure audio-visual equipment, reserved tables seating 8 or 10 dinner guests (if available), etc.
- Advance seating reservations may cause problems, so the open seating arrangement is preferred. However, extra seats and higher bid amounts are offered for those who pay for “business tables” at the front of the room. If your banquet is held at a motel or hotel, remember to negotiate a dining room contract prior to your contract with us.
- Select the menu. Insist on quality. A puppy meal is not acceptable. Emphasize fresh food and game dishes. Events are known for their menu. It is illegal to sell wild game. Negotiate the price. Try to get a person with catering or event planning experience to help.
- Arranges for guarantee or a charge by the plan with the caterer whenever possible. Be prepared. There will be “no-shows.” Plan for 10 percent fewer dinners than ticket sales. Restaurants can usually accommodate a few more than guaranteed. Never order a large number of extra meals, no matter how much you think people will show up at the door.
- Insist on written confirmation from venue management for all arrangements.
- The entire dinner should be served and tables cleared in 45 minutes.
- Plan in advance for a silent auction. NWTF bid sheets are provided.
- Provide security. Many firms have security people at all of their events and many times the service can be donated. Otherwise, off-duty policemen, wildlife officers, and sheriffs deputies are good to have present.
- Get plenty of help and be in the banquet room as early as possible to set up for the event.

www.nwtf.org
Arrangement Chair’s Checklist
(Maybe assigned to Banquet Chair or Co-chair)
- Have a public address system adequate for a large, noisy crowd.
- Menu selections and deadline.
- Flower lining place for the place, including tips and taxes (if any). Pay tax on meals only — not on tip.
- Number of reserved group tables.
- Number of food on hand.
- Minimum guarantee (two days before dinner, suggest 10 percent LESS than tickets sold).
- Price per plate guaranteed, including gratuities, and any applicable taxes.
- Bar agreement — location of bar, number of bartenders, pricing, liquor license (if applicable), etc.
- Place cards for reserved group tables.
- Table signs with appropriate and retirement for group tables.
- Ensure the room can be converted easily without difficulty. (Check the location of the kitchen, entrance and other doors in relation to the head table and other tables.)
- Provide a diagram of room setup.
- Time for refreshments, meal service, registration — stick to these times.
- IMPORTANT: Written contract with management covering pertinent points above.
- Request a copy of insurance for facility, if required. (Call the NWTF’s Karen Poweae at 803-63-3106)

Publicity Chair’s Duties
- Recruit members people who do a large volume of advertising, to publicize your chapter’s events.
- Contact local outdoor writers, sports editors, and radio/T-V broadcasters.
- Publish or prepare press releases for all meetings.
- Contact local public relations professionals and media.
- Distribute press releases, copy, and additional information to all committee members, their representatives, etc. If possible, get pictures of committee meetings. Promoting the program is a good idea.
- Arrange for donated services of a competent photographer at dinner.
- Publicity prep as per day, but do not deliver the sale.
- Personal contacts sell most tickets.
- Arrange for pre-dinner displays of merchandise, books, and country clubs as well as good places to display a trophy.
- Rotate display every two weeks to generate interest.

Price of dinner is important. Ticket price should include all meals, one year NWTF Membership and overhead costs (i.e., facility rent). Members receive a membership card, decal and Turkey Country magazine (published six monthly). Don’t rely on committee chair to think that a reduced ticket price will sell more tickets.
- With the NWTF Women in the Outdoors program, sponsors are encouraged to become members at the time of the ticket purchase or at the banquet. Women in the Outdoors members receive a six-year membership, membership card, decal and Turkey Country magazine.

It is mandatory that all tickets include a membership card and all attendees at the NWTF event become members. Individuals who are already members, encourage them to give a membership to a friend, donate to the library, upgrade their membership, or make a contribution to our conservation effort.
- Use the ticket control sheet to track ticket sales, membership by type, total numbers and revenue collected.

Volunteer Recruitment
Volunteer recruitment is the most valuable investment we can make to ensure the NWTF continues to successfully deliver on its' Save the Habitat, Save the Hunt, objectives. Conserving critical upland habitat and securing the future of our hunting heritage are all dependent upon the foundation upon which the success — the volunteers who make our events happen. The NWTF’s volunteer base is over 20,000 and growing. We have the know-how and the tools to help you successfully establish and grow your committee.
- Make this as annual investment. A part of your chapter's culture.

Step 1: Help Your Committee Believe In Recruiting
- There is not anNWTF chapter in the country, new or old, that could not benefit from adding additional volunteers to their committee.
- Thus, the first step in making volunteers more productive is making your chapter embrace the importance of recruiting. It’s easy to say that, on average, each volunteer raises an additional $50 to the chapter’s bottom line, but this is true even to that extent. More volunteers mean more opportunities for successful hunting, more enthusiasm and new ideas on the committee, better organization, and more funds to share.

Step 2: How to Recruit Prospective Volunteers
- There are a number of ways to approach prospects to attend your recruitment meeting, but none are more effective or efficient than a personal ask by your existing committee members. Successful chapters understand that our business is relationship business. One-on-one contact is the key to the committee’s successful recruitment program.
- Knowing that, the first step you should take when your chapter agrees to hold a recruitment meeting is to ask each of them to personally bring one person to the meeting. Even if only half of the committee does this successfully, you know you will have new prospects in attendance. Furthermore, many people feel much more comfortable attending a meeting where they know someone than as they do walking into a room full of strangers.
- Your regional director can complement your recruiting efforts by using lists to which they have access. A member list from your local area is an excellent source for prospective volunteers. People who are willing to volunteer with the NWTF are more likely to become volunteers than others. Contact lists to which you have access. When you have a recruitment meeting date set, and a posted mailing to prospects and invite them to attend, following up with a personal phone call is personal. It’s a cost associated with this, but recruiting one new volunteer makes it all worthwhile.
Remember, successful volunteer recruitment starts with asking!

Step 3: Hold A Recruitment Meeting

Recruitment meetings can take many forms. In some cases, it’s just part of the agenda during a regularly scheduled committee meeting. Normally, chapters choose to hold recruiting meetings at a different location than their typical meetings, like a gun club, and have dinner, socializing, etc. Whatever the case, all recruitment meetings should make prospective volunteers feel welcome.

Whatever the setting, your committee chooses for their recruitment event, the following is the suggested flow for the evening’s meeting:

- The chapter president welcomes everyone. At that time, the president can introduce the chapter, talk about its history and accomplishments, talk about plans for the upcoming event and introduce the field staff representative to deliver the NWTF 101 presentation.
- Remember, to everyone in the room you and the RD are the experts on all things NWTF. Take confidence in that fact. Your successful presentation of the NWTF 101 to prospective volunteers will help to sign up and help.
- Delivery of the NWTF 101 presentation should be executed in 20 minutes or less. As you know, this presentation is built to start with an organizational overview, offer national perspective, and then get state specific. This gives current and prospective volunteers an understanding of how their efforts fit into the bigger picture.
- Open the floor for questions, which can be answered by the chapter president or RD. It’s important to have chapter president or RD be the one to answer questions, as a volunteer makes our organization look much more impressive. You’re doing it because you love it.
- Before the evening is over, pass around a sign-up sheet for attendees to put down their contact information including e-mail address.
- Finally, make sure your next meeting is scheduled before everyone leaves that night. Not having the details of your chapter’s next meeting solidified is a big mistake.

Your RD will take the time to introduce themselves to your prospective volunteers in attendance. Whether or not they decide to join the committee, the fact that they got to meet the staff will pay dividends in the long run. The RD is after all, the expert! And their presentation will teach them more about the NWTF than they knew before they came.
Step 4: Successfully Retain Volunteers

Successfully retaining prospective volunteers who attend your event begins by making them feel welcome. Educate them about the NWTF get their contact information on the sign-up sheet, and tell them when the next meeting is. Chances are you'll lose them. However, if you did all of those things, then you can help your chapter take the next step in successfully retaining them on the committee.

Prior to the chapter's next committee meeting, the chapter president should call, or at the very least, e-mail, new volunteers who attended the recruitment meeting and remind them about the upcoming meeting. Again, personal contact is critical.

When they show up at the next committee meeting, there's more work to be done. Perhaps the most important thing a committee can do to keep new volunteers engaged is to give them responsibility. That ownership gives them a reason to come back for another meeting or two. If someone doesn't have something that they are directly accountable for feeling like a contributor makes new volunteers feel like they're helping to make a difference.

If you're recruiting into a healthy committee and all of the roles are filled, work with your chapter leaders to assign new volunteers a mentor.

Finally, do pass on opportunities to share NWTF successes with all new volunteers, new and old. To keep them connected with the organization, you would be amazed how much it means to someone who loves the organization and what we stand for.

Successful "night of the event" recruitment should include the following three practices:

1. Recognize and thank your existing committee members in front of the crowd. This recognition makes them feel appreciated, but it also introduces your attendees to the concept of volunteering and the role volunteers play in supporting the event. Consider having the committee members all wear the same shirt, so they can be noticed at the event.

2. Invite everyone in attendance to become a volunteer. Encourage them to talk with a committee member or fill out a card on the table.

3. "Night of the event" recruitment cards should be placed on every table. Encourage attendees to fill them out. Not only do the cards give people a chance to indicate that they want to be volunteers, but it gives them a chance to learn how they can help about the event, when they come from and much more. They are included in your banquet pack.

Step 5: Recruit at Your Event

Outside of holding a recruitment meeting, there is no better place to tap into likely volunteer prospects than at your upcoming banquet. Your chapter has a room full of supporters who are all having a wonderful time supporting the NWTF, and it would be a mistake not to ask them to join the committee.

At the end of the meeting, you should thank everyone on the committee to have that role filled in practice on the night of the event. The responsibilities are simply outlined, but they are achievable in the long run.

Remember, a room full of NWTF supporters is a solid opportunity to recruit new volunteers.
Step 6: Hold a Wrap-Up Meeting

Following up an event with a wrap-up meeting is a good practice for a number of reasons. Not only is it a chance to review the event’s success, but it is also a chance to connect with new and old volunteers with their success, which is critical to volunteer retention.

At the meeting you should welcome new attendees who expressed interest in becoming volunteers on your committee. Inviting them to your wrap-up meetings is a sure-fire way to ensure they stay on board for next year. On the other hand, inviting them early on, before following up with them, almost ensures you fail to convert them to volunteers.

Always invite prospective volunteers to your wrap-up meeting. And always do it promptly.

The new ideas and enthusiasm your brand new volunteers will bring to your committee will naturally lead to an interest in doing more as a chapter.

Recommended Chapter Meeting Plan

First meeting (approximately three months prior to banquet)

- Appoint banquet chair
- Develop committees and chairs
- Finance (Chapter checking account balance)
- Arrangements
- Publicity
- Auction and prizes
- Tickets
- Sponsorship
- Hunting Heritage Programs: JAKES, Women in the Outdoors, Wheelin’ Sportsmen.
- Determine date, price, and location. Note: Check for conflicts with other outdoor-related events, sports, public or religious holidays. (Try to promote the date and place with these in mind)
- Print tickets. (This is automatic and tickets ship 16 weeks prior to the banquet)

- Set income and attendance goals
- Start soliciting prizes locally
- Donations from members (beach houses, accommodations, ski lodges, hunting or fishing trips)
- Donations from large corporations
- Donations from local sporting goods stores and other merchants such as restaurants, auto dealerships, flower shops, etc.
- Set dates and times for future meetings (suggestion: hold one weekly meeting until a month before the banquet and then weekly meetings until the banquet date)
- Send a signed Federal Firearms License to the RD indicating your banquet date and chapter name.

Second meeting

- Distribute tickets and log on ticket control sheet
- Develop a list of people for each committee member to contact about attending (i.e., other conservation group members, existing members, etc.)
- Develop a list of local merchants and assign someone to contact each one
- Committee progress reports
- Publicity — mail never “pass release”
- Mail invitations to members in the area, including “early-bird” offer (direct mail invitations have a limited success). The only way to ensure success is to sell tickets one-on-one. Do not mail your tickets.

Third meeting

- Committee reports
- Sales reports — each committee member should keep a report on ticket sales
- Continue local prize solicitation
- Report on NWTF prize solicitation
- Review “early-bird” sales
- Publicity
Fourth meeting
- Sales reports
- Progress on prizes.
- Revisit publically
- Arrange to display art in local banks, country clubs, and other high traffic areas with good security.
- Prepare telephone solicitation to members and businesses that have not supported the event. Make personal contacts when possible.

Fifth meeting
- Sales reports
- Publicity
- Follow up post card mailings with phone calls and visitations to members who did not respond. Remind them that the only way to ensure attendance is to collect for their ticket.

Sixth meeting
- Sales reports
- Final push in market and set a deadline
- Continue telephone campaign to prospects who did not respond to mailings.
- Assemble move and set up.

Seventh meeting
- Final sales report
- Final seating chart
- Set up and allocate reservations
- Call the establishment with a guarantee. Note: Be persistent when guarantee
- Do not get caught in a situation. Be sure to follow up on purchasing after the dinner; then ticket sales. Renters can usually accommodate a few more than projected (5-10 percent average)
- Compile list of prors and donors and print final program
- Publicize—develop a total push!
- IMPORTANT: The last seven to 10 days are the best for ticket sales. Cut off ticket sales a day or two before the banquet. Never order a large number of meals or the number of tickets sold.

NWTF Hunting Heritage Banquet
- A full committee and volunteers should arrive as early as possible (10 a.m. - 2 p.m.) to set up prize displays. First time events may take a little longer to set up. Get everyone to help. Make a short plan.
- Ensure all firearms have locks.
- Consider eating early before the crowd arrives.
- Invite press and photographers.
- The more volunteers on the committee, the faster the evening will go.

Post banquet follow-up meeting
- A complete financial report is due postmarked within 30 days and a net over $3,500 to receive a gun for next year's event.
- Committee review of performance.
- Problems and ways to improve.
- Location.
- Price.
- IMPORTANT: Select next year's banquet chair.
- Send thank you letters to local donors with donor decals and a banquet success story.
- In conjunction with your RD, select next year's date, location, plan, and confirmation with facility for next year's date.

Tips for Success
- Plan a high end menu and stick to it.
- Set reasonable goals. Always practice safe gun handling during all events.
- No alcohol.
Set Your Goals – Develop a Budget

The average NWTF banquet requires 150 members, grosses approximately $24,800 and nets $14,200. For existing chapters, your RD has built a preliminary budget for your chapter to exceed the previous year’s goals and will share this with you. Review your prior year’s performance and growth plans with them. The following is an example of how revenues and expenses are derived from a successful event. Your RD can provide a goal sheet.

<table>
<thead>
<tr>
<th>Items</th>
<th>Banquet</th>
<th>Banquet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendees (150 members)</td>
<td>$3,750</td>
<td>$0</td>
</tr>
<tr>
<td>NWTF Women in the Outdoors Members</td>
<td>$750</td>
<td>$0</td>
</tr>
<tr>
<td>AX (220) Sponsors</td>
<td>$5,750</td>
<td>$2,750</td>
</tr>
<tr>
<td>NDW (135) Members</td>
<td>$3,500</td>
<td>$0</td>
</tr>
<tr>
<td>Auction - 35 items</td>
<td>$7,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>Funeral expenses</td>
<td>$0</td>
<td>$750</td>
</tr>
<tr>
<td>Silent auction - 25 items</td>
<td>$1,000</td>
<td>$1,000</td>
</tr>
<tr>
<td>Silent auction - 15 items</td>
<td>$0</td>
<td>$1,000</td>
</tr>
<tr>
<td>Underwriting</td>
<td>$2,000</td>
<td>$1,250</td>
</tr>
<tr>
<td>Total income</td>
<td>$30,920</td>
<td>$11,075</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$24,445</td>
<td>$0</td>
</tr>
</tbody>
</table>

Important things to remember...
- Your RD has a sound system, credit card machine(s) and other equipment.
- Control costs. Get RD approval before making any local purchases.
- Do not over order food. Base meal orders on tickets sold.
- A good auctioneer is a must.
- Aggressive, professional salespeople sell more raffle tickets.
- A good floor plan helps ensure success.
- NWTF membership is a must at all events.
- While JAKES are an integral part of our mission, the banquet is a fundraiser. A JAKES event can be planned later.
- Women in the Outdoors, Sponsor and JAKES memberships help your net-to-gross ratio and are important to the NWTF.

Banquet merchandise invoices

Banquet invoices are normally mailed to the chapter treasurer and the RD. You can determine if they are banquet invoices by looking at the lower left corner. The word “banquet” or “QTR” will appear in invoices marked “QTR” will be deducted from banquet proceeds prior to your banquet financial report is received. Do not send a payment for these invoices.

Chapter invoices

Chapter invoices are generated when the chapter requests the RD and an authorization for their chapters to use non-merchandise items such as JAKES hunting license fees. Chapter invoices will be marked “chapters” in the lower left corner. Chapter invoices are the responsibility of the chapter to pay and are due within 30 days. Your RD can provide guidance on chapter invoice payments.

The most important and meaningful thing that we sell is membership.

Credit invoices

Credit invoices are generated when a RD submits a request for credit for merchandise not received or returned by the NWTF. They will be marked “credit” in the lower left corner. If you receive a product at your event and the RD decides not to sell or use the product and return it to the warehouse, you will receive a “credit” invoice from accounting.

Banquet Planning Checklist

Prior to Event
- Obtain chapter checking account balance at first meeting (three months out)
- Ticket banquet (RD will do this in April; May each year for the next year)
- Order auction packages (RD)
- Order supplementary items (RD)
- Secure a breech facility
- PPL Information current and sent to RD
- Cans ordered (RD)
- Tables needed
- Chairs needed
- Auctioneer
- Raffle team (like professional is preferable)
- Security (This is a good idea if alcohol is served. Have an off-duty police, sheriff or game and fish personnel present)

www.nwtf.org 13
Sound system
Contact Sam dealer
Bartender
Liquor, beer, ice and mixers (Be familiar with the alcohol policy. Sell cups, not liquor. Does the caterer have liquor licensed?)
Master of ceremonies
Basket program (auction list)
Table covers (NWTF type, stuffed with merchandise)
Playing cards
Corporate table (RD will explain table sales and cost, example: one sponsor membership and seven regular memberships)
Sponsor table (RD will explain table sales and cost, example: one sponsor membership and seven regular memberships)
Ticket sales number (font and weekly)
Caterer confirmed (Ordie meal based on confirmed ticket sales three to four days prior and confirm with caterer)
Dance and social media (RD will suggest what to use based on total number of people attending)

End of Banquet Meeting
Count all cash, checks and credit cards (report on cash count sheet with signatures)
Count accounting numbers to the RD
Schedule next year's event with facility and the RD

After the Banquet
Banquet final report (due within 30 days)
Thank you card to attendees (chapter/committee)
Committee wrap-up meeting (review performance invite new volunteers)

Sample Banquet Schedule
Keep your banquet schedule. You want everyone to enjoy it and get home as early as possible. Next year's success depends on how much fun everyone has this year.

TIME
6:00 pm - 7:30 pm Refreshments and social, Raffle ticket sales, Silent auction
7:30 pm - 8:30 pm Dinner, Introductions, Thank the committee, No speeches
8:00 pm - 10:00 pm Auction and raffles, door prizes, etc.
10:00 pm Adjourn

Guidelines for a Successful Auction
List the verbal auction to 30-45 items.
Provide an auction program with detailed descriptions of each item for each person at the event.
Hold the auction in a timely fashion.
Do not interrupt the auction.
Make certain the auctioneer knows what he is selling.
Be sure the sound system can be heard.
Strategically place known bidders in the room (corporate table).
Do not give the value of the auction item.
Use bid callers in spots to make a lot of noise to identify bidders, and make the auction exciting.
Have bid callers control the bidders immediately and have him sign the ticket indicating the amount of the bid.
Do not release merchandise from the safe area without payment.
Auctions should last approximately one hour.
Keep the auction moving fast to ensure participants remain engaged.

NWTF Gun Transfer Procedures
The Gun Control Act of 1968 (GCA) set forth certain procedures for the sale and transfer of firearms. In accordance with GCA requirements, the NWTF has established the following procedures for use in conjunction with our banquet program.

Shipments
Each chapter will coordinate with and designate a local gun dealer to handle firearms for their banquet. The designee may change from one year to the next. Your banquet will put seven to 20 people in the FFL, dealers store as customer.
Send the Federal Firearms License (FFL) to your NWTF RDO as soon as possible. The FFL must be received a minimum of 15 days prior to the event.
The NWTF will ship firearms to the FFL dealer. An authorized representative of the FFL will take the firearms to the banquet. The firearms may be displayed, raffled or auctioned, but must then be returned to the FFL's place of business.

Disposition
The following procedure is approved by the Bureau of Alcohol, Tobacco and Firearms (BATF) and is the process required by NWTF policies.
An NWTF banquet transfer form, included in the banquet package, should be completed for each gun and the yellow copy delivered to the Federal Firearms Licensed dealer after the banquet. The pink copy should be given to the buyer and the white copy retained by the chapter president.
The dealer's representative will retain custody of the firearms and return them to the FFL's place of business after the banquet.
Notify the buyer of the transfer to the FFL, place of business with their copy of the transfer form to claim their gun and complete BATF Form 4473 and pass the NICS background check. Firearms are delivered to the buyer at the FFL's place of business.
If the firearm transfer is denied by the BATF, the gun dealer will notify the NWTF representative noted on the bottom of the NWTF banquet transfer form. An NWTF representative, rather than the RD, will contact the RD, who will determine the disposition of firearms.
The NWTF gun transfer policy is subject to change in the event of BATF regulation changes.

Banquet Fundraising Incentives
All incentives earned are to be used for fundraising at the following year's banquet. Membership, Sponsor and Raffle incentives will be shipped to all banquet meeting the membership criteria.

www.nwtf.org
Membership gift
One gift for every additional 50 members above 100.
Example:
• One free gift for 100-149 members recruited.
• Two free gifts for 150-199 members recruited.

Sponsor gifts
One free gift for every 10 sponsors recruited.

JAKES Incentives
Prizes awarded for each JAKES membership over 100.

30 Day Incentive Gun
Banquets that have a net event income of $3,500 or more and complete their financial report in less than 30 days receive a gun for the new event. (Postmarked within 30 days)

Golden Gobbler – 50 percent or above
Banquets that have a net event income of $3,500 or more and complete their financial report in less than 30 days with a net gross receipt of 50 percent or better will receive a Golden Gobbler recognition gift for each committee member. Chapters that reach Golden Gobbler status for three years, five years, 10 years, 15 years, 20 years, 25 years and 30 years receive a special gift for each committee member the year they achieve that goal. (Postmarked within 30 days)

60 Percent Club
Banquets that have a net event income of $3,500 or more and complete their financial report in less than 30 days with a net gross receipt of 60 percent or better receive a special gift for each committee member. (Postmarked within 30 days)

Special free gifts
- One free gift for money and completed report in less than 30 days and have an event income greater than or equal to $3,500. (Postmarked within 30 days)
- One free gift for 50 percent net gross ratio or higher (includes membership) net greater than or equal to $1,200 and completed report in less than 30 days. (Postmarked within 30 days)

NWF Hunting Heritage Programs
Hunters and our hunting rights are under attack. Because hunters pay for much of our wildlife and habitat conservation, we must work hard to create hunters and provide more places to hunt. The NWTF's 10-year initiative—Save the Habitat, Save the Hunt—tackles these challenges. By creating 1.5 million hunters who will embrace the outdoors and protect our conservation legacy, NWTF Hunting Heritage Programs will save the hunt. We encourage your chapter to use these programs to preserve the hunting heritage of your community.

The NWTF offers the following Hunting Heritage Programs:
- In 2002, the NWTF began the JAKES (Junior Acquiring Knowledge, Ethics, and Sportsmanship) program. In 2003, NWTF launched Extreme JAKES, providing teams advanced outdoor opportunities.
- Prior to the implementation of the Women in the Outdoors program, NWTF supported female-focused outdoor skills training programs through various organizations. Seeing the demand for such activities for women, the NWTF expanded its outreach efforts to include a formal Women in the Outdoors program in 1998.
- Wheelin' Sportsman was launched in 2000 after the NWTF recognized the need to introduce and reintroduce people with disabilities to the outdoors.

Getting Started
Contact your Regional Director, visit www.NWTF.org, or contact National Staff.

Hunting Heritage Programs Staff Contacts
If you need assistance in starting a Hunting Heritage Program in your area, your first point of contact is the RD. For further assistance and resources, call (800) 653-3106.

Hunting Heritage Programs Manager
Mandy Halding
mhalding@nwtf.net

Hunting Heritage Programs Coordinator
Teresa Carroll
tcarroll@nwtf.net

www.nwtf.org
MAJOR DONOR RECOGNITION PROGRAM

The NWTF depends on donations, large and small, to complement the efforts of its volunteers and members. The money you invest today helps the NWTF conserve or enhance critical upland wildlife habitat, create hunter's, and open access to new acres for hunting.

The NWTF.org
Application for Affiliation
Of a Local Chapter of the
National Wild Turkey Federation
Edgefield, South Carolina

Date ____________________________

The Undersigned, acting on behalf of the

_______________________________
Name of Organization

_______________________________
City, State, Zip

do hereby submit our application for affiliation with the National Wild Turkey Federation. In making this
application, we individually and collectively subscribe to the objectives and purposes of the NWTF as set
forth in its bylaws. We further certify that we accept the NWTF Affiliation Agreement as printed hereon and
do hereby agree that this chapter shall abide by this agreement, as affirmed by the chapter officers' 
signatures affixed to this application.

NWTF Affiliation Agreement

1. As officers of this organization, seeking a charter from the NWTF, we certify that our chapter is organized
exclusively for educational and charitable purposes and shall be to establish, maintain and promote interest
in the wise conservation and management of the wild turkey and other upland wildlife; to raise money for
developing, preserving, restoring and maintaining habitat for wild turkeys and other upland wildlife; to give
and promote entertainment, lectures, and exhibitions of any and all descriptions for the general instruction of
the members and proper in the furtherance of said objectives not inconsistent with the NWTF's exclusively
educational and charitable objectives.

2. All members of the said chapter are required to be members of the NWTF, but are not required to pay
additional state or local chapter dues.

3. All local chapters must conduct at least one Hunting Heritage Super Fund Banquet annually to maintain
active chapter status.

4. As officers of a chapter, we recognize our responsibility to return all proceeds to projects that will benefit
the wild turkey and other wildlife. Any and all merchandise or materials received by the chapter shall be
used for its intended purpose and monies generated shall be properly accounted for and reported to the
NWTF.

5. In the event of the liquidation, dissolution or termination of the Chapter Charter, whether
involuntary or by operation of law, all assets, receivables, outstanding liabilities, and all other financial
assets and records of the Chapter shall be turned over to the NWTF immediately.

6. We elect to be included in the group 990 tax return filed by the NWTF and adopt the Bylaws of the
National Wild Turkey Federation.

SIGNATURE
(State Chapter President)

SIGNATURE
(Local Chapter President)

NWTF
Letter of Acceptance of Guidelines for Local Chapters for Affiliation to the National Wild Turkey Federation, Inc.

These guidelines are for the ___________________________ Chapter of the ___________________________ State/Provincial Chapter of the National Wild Turkey Federation, Inc.

Our purpose is to promote the wise conservation and management of the wild turkey, children’s and women’s outdoor education, and protect our hunting heritage in our local community and country. This Chapter will work with government agencies, other organizations and individuals to develop educational programs about our native wild turkey populations. We support compliance with all laws and regulations relating to wildlife, including laws pertaining to shooting hours, game bag limits, and poaching. In order to be affiliated with the National Wild Turkey Federation, this Chapter must host at least one Hunting Heritage Super Fund Banquet each year to raise funds for our conservation efforts.

We acknowledge that each Local Chapter is an unincorporated division of the National Wild Turkey Federation, and must follow the laws regulating non-profit organizations like the NWTF, which are set out at Section 501(c) (3) of the Internal Revenue Code. The NWTF will provide instructions about this, but in general, this is a non-profit organization, and none of this Chapter’s earnings or assets may be used to the benefit of any private individual or individuals.

Although each Chapter has its own governing body and may conduct conservation activities on its own, the assets and liabilities of this Chapter are those of the National Wild Turkey Federation, Inc. Upon dissolution of this chapter all financial assets and records will be turned over to the Federation immediately.

As part of a 501(c)(3) non-profit organization, this Chapter must and will give full financial information to our state/provincial chapter, the NWTF, and state/federal authorities and will not expose the NWTF to unreasonable liabilities or take any actions that may bring discredit to the local, state/provincial or national organization.

Chapter President,

(Signature) ___________________________ (Print Name) ___________________________ Date ___________________________

www.nwtf.org
NWTF Branding Guide

The Brand Standards Manual is our guide to ensure everyone who uses our logo presents it in the best way.

The NWTF brand represents who we are to the world, so it's crucial we protect and build it.

By providing consistent, positive brand experiences to our audiences, we will be successful in sharing our mission and telling our story.

NATIONAL WILD TURKEY FEDERATION

Organization Identity and Brand Standards Manual

PURPOSE OF THE MANUAL

The NWTF Corporate Logo, represented in this document, is a key element of our organization identity. The logo is a representation of the NWTF and its mission to conserve the wild turkey and preserve the tradition of deer hunting.

NWTF is a non-profit organization dedicated to the conservation of the wild turkey and the preservation of its hunting heritage. NWTF promotes habitat management, research, and educational programs to conserve the wild turkey and its environment.

HISTORY OF THE NWTF

The NWTF was founded in 1946 by a group of dedicated hunters who were concerned about the decline of the wild turkey population. The organization was established to promote habitat management and encourage ethical hunting practices.

Today, NWTF is the largest organization dedicated to the conservation of the wild turkey, with over 250,000 members worldwide. The organization's mission is to conserve the wild turkey and preserve the tradition of deer hunting.

NWTF Organization Identity Elements

The NWTF Corporate Logo is the primary element of the organization's identity. It should be used consistently on all materials to ensure brand recognition.

HABITAT. HUNT.

Habitat Management

Habitat management is crucial for the conservation of the wild turkey. NWTF promotes habitat management practices that provide a suitable environment for the wild turkey to thrive.

NWTF is dedicated to habitat conservation, focusing on the management of forests, fields, and wetlands to provide quality habitats for the wild turkey.

https://www.nwtf.org

www.nwtf.org 19
Appendix K

NWTF Performance Evaluation System
### LightWork - Template Detail

**HQ Performance Appraisal**

<table>
<thead>
<tr>
<th>Decimal Precision</th>
<th>Default Scoring Definition</th>
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<tbody>
<tr>
<td>0</td>
<td>Default Scoring Definition</td>
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<thead>
<tr>
<th>Key</th>
<th>26</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>C WORK QUALITY</th>
<th>Carry out tasks that meet or exceed standards of acceptability. The degree to which the employee's work is free of flaws.</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Quality of Work</td>
<td>Comp</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>C QUANTITY OF WORK</th>
<th>The total amount of acceptable work completed. Including the completion of assignments in sufficient quantity within allowed time and resources available.</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
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</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Productivity</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C JOB AND INDUSTRY KNOWLEDGE, SYSTEM SKILL</th>
<th>Knowledge, familiarity and connections create efficiency. Does the Employee have a well-developed sense of understanding and fluid ability to work with in this Industry and job as appropriate for their current job responsibility or those they aspire to? Where are they on the scale of developing this ability or level of knowledge?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
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<tbody>
<tr>
<td>Competency</td>
<td>Job and Industry Knowledge</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>C TEAM WORK</th>
<th>Does the Employee show and habitually practice the tendencies and practices that produce a productive team environment? Do they add to the productivity or do they have habits or practices that need to be adapted to be productive for the team?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Cooperation Skills</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C COMMUNICATIONS</th>
<th>Clarity, Regularity, and Completeness of communication to appropriate team members, volunteers, management, etc. What will improve this Employee effectiveness with communications? Does this Employee communicate in a positive manner?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Communication Skills</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C JUDGMENT</th>
<th>Does this Employee show appropriate judgement in the day-to-day, as well as the strategic level decisions that have to be made consistently to succeed at their position responsibilities?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
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</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Judgment Skills</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C CLIENT/CUSTOMER SERVICE</th>
<th>Does this Employee provide the level of care and service that is necessary to maximize results or represent the NWTF brand with distinction to both volunteers and members, as well as outside interests?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Human Relations Skills</td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C INITIATIVE</th>
<th>Does this Employee show the ability to identify opportunity and then initiate activity that will produce positive results from this identified opportunity? Do they follow through to completion and deal with objections or problems along the way to ensure that the opportunity comes to fruition?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Initiative In Accomplishing Goals</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>C ADAPTABILITY/FLEXIBILITY</th>
<th>Does this Employee demonstrate the ability to deal with the changing environment and fluctuating priorities that occur in our industry and with volunteers? Do they adapt in a productive way? Are they flexible with both internal and external system changes and surprises?</th>
<th>Allow Comments: No</th>
<th>Weight: 1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td>Adaptability to Change</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
9 C INTERACTIONS/RELATIONS
How does this Employee interact with coworkers, with management, with volunteers in general? Positive and productive? Does it include and demonstrate leadership and principle? What are the practices and activities that would help this Employee develop increasingly productive relationships?

10 C SAFETY PERFORMANCE
Does this employee follow and enforce all NWTF safety guidelines? How is the Employee's effectiveness in maintaining and practicing safe work habits?

11 C OVERALL EVALUATION OF PERFORMANCE FOR THIS PERIOD
Take into consideration all aspects of performance for this period when making the overall evaluation. Each of the ten dimensions rated above may not have equal importance on the job. This overall evaluation will take into account the importance of these dimensions to overall job performance.

12 C EMPLOYEE COMMENTS

Appendix L

NWTF Five Star State Chapter Commitment
NWTF Five Star State Chapter Commitment

The NWTF is founded on a strong mission — the conservation of the wild turkey and the preservation of our hunting tradition. We are also guided by a sound vision for the future through our Save the Habitat. Save the Hunt. Initiative. Our success depends on strong commitments at all levels of the organization, from the individual members and local chapters to the staff and national organization. We also understand that the State chapters of the NWTF have tremendous influence on the achievement of this mission by providing guidance and support to both our local chapters and the national initiative.

By entering into this State Chapter Five Star Commitment, we resolve to be a chapter that excels in the areas of Conservation, Hunting Heritage, Fundraising for the Hunting Heritage Super Fund (including the Outreach Fund), and Membership. Furthermore, we resolve to support the local chapters in our state in achieving Local Five Star status and in the process give something back to the communities that support our efforts for wildlife conservation, protecting our right to hunt, developing a stronger relationship between the state and local chapters, creating a positive image for the organization and building a better future for our country.

In order to achieve NWTF State Chapter Five Star recognition and incentives, your state must meet the following minimum criteria between January 1 and December 31 each year.

1. Increase deposits to, and expenditures from, the Super Fund by 3% annually ensuring that adequate funding is available and executed for projects and programs that help achieve our mission.

2. Increase adult members by 3% annually so that we can be more effective at accomplishing our mission.

3. Commit the majority of Super Fund expenditures to aspects that directly impact our mission.
   
   A. Direct at least 40% of annual Super Fund expenditures to habitat projects, land acquisition and access programs that benefit the conservation of the wild turkey and its habitat.
   
   B. Direct at least 35% of annual Super Fund expenditures to mentored hunts, outreach events or other activities and programs that create and recruit new hunters, reengage lapsed hunters or retain current hunters.

4. Provide 5% (up to $5,000) of annual Super Fund expenditures to the NWTF’s efforts to preserve the hunting tradition through the NWTF’s American Hunting Heritage Fund or state coalitions dedicated to hunting and shooting legislation and policy. Money from the American Hunting Heritage Fund will be used on priority projects that protect our hunting heritage and will be used as appropriate to support efforts of our partners such as:
   
   • U. S. Sportsman’s Alliance
   • Congressional Sportsmen’s Foundation
   • National Shooting Sports Foundation
   • Council to Advance Hunting and Shooting Sports
   • National Assembly of Sportsmen’s Caucuses
   • State coalitions for hunting, shooting and scientific wildlife management
   • National and state hunting, shooting and wildlife management related policy and legislative issues

1/8/2015
5. Support local chapter efforts to achieve Five Star status, further their outreach and education efforts, and give something back to their local communities by providing funding through the Super Fund and Outreach Fund as outlined below.

   A. Provide support for local chapters hosting mentored hunts.

   B. Provide support for local chapters to host at least one of the following Outreach events:
      - Women in the Outdoors
      - Wheelin’ Sportsmen
      - JAKES

   C. Support local chapter efforts to participate in community-based outreach activities such as:
      - 4-H Shooting Program
      - Archery in the Schools
      - Explore Bow Hunting
      - Local FFA Conservation Based Programs
      - Boy Scouts Shooting
      - Girl Scouts Archery
      - Other Community-Based Conservation, Shooting or Hunter Education Program

The __________________ State Chapter agrees to adopt and implement the above criteria on an annual basis. By adopting these goals, we acknowledge the importance of our volunteers and local chapters. This action signifies our commitment and passion to provide a future where wildlife resources are abundant, and there are ample opportunities for everyone to hunt and enjoy the outdoors.

______________________________  ____________________
State Chapter President          Date

______________________________  ____________________
NWTF Regional Director/Regional Biologist  Date

______________________________  ____________________
NWTF Technical Committee Representative
Or State Recruitment & Retention Officer  Date

Send completed form to: NWTF, Altta: Delliah Hallman, Post Office Box 530, Edgefield, South Carolina 29824

1/8/2015
Appendix M

Table 26: Mission-Critical Program Perceptions Based on Level of Professional Hierarchy
Q3. My professional level within the organizational hierarchy is:

Q37. Which mission-critical program delivery does your office encourage, promote, and/or support? (SELECT ALL THAT APPLY)

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<th>Senior Executive</th>
<th>Other</th>
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<td>Wheelin Sportsman</td>
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<td>6</td>
<td>6</td>
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<td>Purchasing equipment for agencies or law</td>
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<td>20.79%</td>
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<td>Other</td>
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<td>3.23%</td>
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