Channeling (Com)passion: Exploring the Strategic Potential of Internal Communications in Member-Serving Community Nonprofit Organizations

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Channeling (Com)passion
Exploring the Strategic Potential of Internal Communications in Member-Serving Community Nonprofit Organizations

by
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Capstone Research Report Submitted in Partial Fulfillment of the Requirements for the Master of Nonprofit Administration Degree in the School of Management directed by Dr. Marco Tavanti

San Francisco, California
Summer 2021
Abstract

This qualitative research examines the extent to which internal communication within member-serving nonprofit organizations is used strategically to harness the dedication of a nearly all-volunteer labor force and align their efforts to achieve organizational goals. This research focuses on the prototypical nonprofit village model that aims to promote aging in place, healthier aging, and a higher quality of life for older people through a combination of member supports, referrals to affordable aging services, and social and cultural engagement. An established and expanding village organization in California served as a case study. Interviews conducted with highly involved member and volunteer leader stakeholders revealed a strong affinity for organic, informal communication and relationship building, and also program and service areas that have grown into functional silos with some unclear boundaries and objectives. A lack of communications policies has contributed to knowledge sharing tentativeness. Well-positioned liaison groups orchestrate some communication bi-directionally between leadership and general members, but information gaps were identified, as well as myriad challenges related to rapid growth and the need to restructure staffing support. No formalized strategic planning efforts were found nor were internal or external outreach and communications plans in evidence. Nonprofit organizations like the member-serving village model that face sustainability challenges will need to prioritize strategic planning and establish integrated internal communications policies and processes to better prepare their organizations for continued growth.

Keywords: village model, internal communications, strategic planning, stakeholder analysis
Acknowledgments

First, I would like to thank the dedicated individuals associated with the case study village organization who enthusiastically and graciously offered their time and candid perspectives as part of this capstone research study, without whom this project would not have been possible.

I would like to acknowledge the School of Management and Dr. Marco Tavanti for designing a nonprofit management program where professionals with different backgrounds and experiences can come together to hone our leadership skills and expand our capacities to lead impactful and mission-driven work. I would especially like to thank Dr. Richard Waters for his strategic communications and research expertise, his endless willingness to make himself available for brainstorming and advice, and for making learning engaging and enjoyable especially during a pandemic. (I will never not think of him every time I hear a Dad joke or see a manatee reference.) I would also like to extend my gratitude to the wonderful people in my cohort with whom I shared this academic experience during an unprecedented time. I am inspired by their brilliance, creative thinking, and compassion, and I am excited to witness all the ways they will continue to do good in the world.

Lastly, I would like to thank my family and friends who have cheered me on over the last six years as I pursued both Bachelor’s and Master’s degrees. Even though I missed countless dinners, little league games, and simple time spent together, they made me feel supported at every step. Most important, I would like to express my deep love and gratitude for my partner David, without whom my academic journey and accomplishments would not have been possible – truly. I owe him more than I could ever repay.
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Section 1: Introduction

According to the U.S. Census Bureau, people who reach age 65 in the United States today are expected to experience greater longevity than ever before. In the years between 2016 and 2030, the older population is expected to increase by nearly 50 percent, and by the year 2035, the number of older people is projected to exceed the number of children for the first time in U.S. history (Vespa et al., 2020). Living longer and living healthier, however, are not guaranteed to coincide, and as innovations and lifestyle behaviors continue to extend life expectancy further, key components that contribute to the quality of life for older persons must be a guiding priority for policymakers, government agencies, and public sector organizations. Chief among the quality-of-life determinants is access to health and social services.

Fewer people over age 70 are living with low physical capacity and the percentage of older people entering residential care and nursing home settings is declining somewhat, however, older persons continue to experience an increased risk of disability, disease, and multi-morbidity health conditions (Freedman et al., 2021). Health care and social services systems in the U.S. have not scaled to a capacity that can meet the needs of this growing older population – an issue about which health experts have been sounding the alarm for decades. According to the National Academy of Medicine, the U.S. has reached an alarming level of unpreparedness with approximately less than half of the “adequately prepared geriatricians, nurses, social workers, and public health professionals” needed to support the older population (Rowe et al., 2016). At the same time, many older individuals in the U.S. are aging independently, which exacerbates two major challenges in older age: lack of caregiver support and social isolation. Families that once relied on intergenerational caregiving have become more geographically dispersed, which means many older adults are aging in their communities (or aging in place) often without access to alternate means of support. In fact, researchers supported by the National Institute on Aging cite the decline of traditional family caregivers, such as spouses and adult children, as one of the key demographic trends affecting Americans age 65 and older. Increased rates of divorce, declining marriage, and lower fertility result in less support for older people and poorer quality relationships and, in some cases, adult children who “feel less obliged to care for elderly stepparents or fathers with whom they did not reside during childhood” (National Academies of Sciences, Engineering, and Medicine, 2018). Caregiving needs aside and adding to the mild to more serious health conditions for which older people need support are the negative health effects of social isolation. Significant health risks have been associated with social isolation in people over age 50, including higher rates of dementia, depression, anxiety, and suicide; an increased risk of heart disease and stroke; and premature death from all causes – a
threat that rivals the effects of smoking, obesity, and lack of physical activity (Centers for Disease Control and Prevention, 2021). If silver linings of the COVID-19 pandemic are to be found, among them would be how the harmful effects of social isolation and the lack of capacity in our health care system and caregiver supports have become part of our national (and international) discourse. Another positive outcome of the past 18 months may be an increased awareness of the value of a unique nonprofit organization model that was born nearly 20 years ago precisely to facilitate peer support, promote a healthier aging lifestyle, improve health, and reduce isolation among older people at the neighborhood level (Scharlach, 2008; Scharlach et al., 2014). This grassroots approach to aging in community is the village nonprofit organization model on which this research is centered.

The village concept began with a small group of neighbors led by founder Susan McWhinney Morse in a historic area of Boston known as Beacon Hill (Beacon Hill Village, 2021). Morse and her neighbors were involved in their community through various volunteer programs and they shared common challenges associated with caring for their aging parents. Societal norms established few desirable options as their parents became unable to continue living in their homes for a variety reasons. Many were forced to leave the homes where they had lived for decades and move to care facilities or to less extreme climates far from family and friends, essentially disconnecting themselves from loved ones and the support systems they had come to value. Others simply followed historical approaches to aging and retirement that focused on maintaining the status quo. “It used to be: collect your social security check and check out your brain. But that’s nuts,” recalls Morse. “Many of our original founders were 65 and on top of their game. We wanted to continue living active lifestyles, while recognizing that there may be periods when we’d need help.” So together, Morse and her neighbors sought an innovative solution.

Driven by a determination to take control over their aging futures, Morse and her friends surveyed 450 residents in their community about activities and resources that contributed to their mental, emotional, and physical wellbeing. Most important, the results of their survey revealed that people overwhelmingly wanted to remain in their homes and community as they aged. In 2002, the Beacon Hill Village formed as a self-governing 501(c)(3) nonprofit organization and welcomed its first members. In exchange for a monthly or annual fee, members receive practical services provided by volunteers, resource referrals, and programs that offer healthier aging activities, arts and culture events, and the opportunity for social engagement. The founding of Beacon Hill Village sparked what is referred to today as the Village Movement, with approximately 400 villages operating in the U.S. and around the world.

“The success of the Village Movement is greatly changing the long-held concept that retired people (older people) naturally become passive participants in their own lives either by choice and/or infirmities,” said
Morse. “That we continue to be vibrant, contributing and informed members of society is what is so exciting about the village concept.”

By several metrics, the growing Village Movement has been a success, but this achievement has not been without its challenges, namely and ultimately organizational sustainability. Villages are born at the hyper-local level, and thus organizational characteristics, member demographics, and access to resources can vary widely and so do the challenges of long-term success. Some villages have deviated from the prototypical model and adopted alternative organizational and operational structures to better meet the needs of their particular membership and in the hopes of achieving sustainability. Regardless of the specific village operational model, achieving ongoing financial stability, offering the right types and extent of support to members that continue to age, and ensuring the degree of equity and inclusion that is possible in any given geographical area are among the top sustainability challenge priorities for all villages. Meanwhile, some villages variably struggle with more fundamental aspects of the organizational model: operating efficiently with minimal paid staff and managing a nearly all-volunteer human workforce that not only delivers practical services to members, but also makes essential contributions at every level of the organization, including leadership. These types of operational challenges are most common among start-up villages, but they also exist to some degree in a few of the well-established pioneer villages that have served as best practice organizations since the beginning of the movement and have enjoyed tremendous growth. The operational challenges facing this category of pioneer village – and more specifically, the strategic opportunities associated with strong internal communications practices – are the subject of this research exploration.

The sections of this paper that follow begin with a literature review (Section 2) that provides an overview of key concepts and terms related to the Village Movement and the member-serving nonprofit organization structure, volunteer leadership and the value thereof, and the role of internal communications within this unique organizational context. Section 3, Approach and Methods, describes the research purpose; research approach, paradigm, and perspective framework; and data collection methodology, including research design and procedures. The discussion in Section 4, Data Analysis, presents the analyses of results, and Section 5, Implications and Recommendations, offers research-informed suggested actions for implementation. And finally, Section 6, Conclusion, provides a summary of main findings and recommendations, the potential impacts and applications for member-serving nonprofit organizations, research limitations, and suggestions for future research.
Section 2: Literature Review

A summary of relevant literature is provided for understanding the scope of this research inquiry. The unique structure of member-serving nonprofit organizations is examined along with the value, challenges, and opportunities of voluntarism and internal communications within this organizational context. A case study approach using a pioneer village guides the analyses and, therefore, a review of the village model, value proposition, and challenges are also discussed.

Community-Serving Nonprofit Organizations

Nonprofit organizations (NPOs) form to fulfill a mission, and as the basic organizing purpose, they must achieve their mission to be considered successful. Success, however, is best measured not in financial terms, but rather how effectively an NPO makes good on their mission in terms of sustainable outcomes relative to their resources (Collins, 2005). For community-serving NPOs, organizing missions are often focused on meeting specific needs of individuals that government agencies and institutions are unable to address for myriad reasons. In many cases, bureaucratic systems have scaled to serve segments of the population and in doing so have foregone the dynamic needs of individuals. Locally focused NPOs whose mission it is to provide non-medical social support services are among those organizations that aim to fulfill the unmet needs of individuals in their communities. Social support services as defined by Johns Hopkins Medical Center is the provision of physical and practical assistance, such as transportation or assistance with household tasks; resources and information; emotional and psychological support, such as listening and encouragement; and a positive outlook and attitude (Fisher, 2020). Some community NPOs focus narrowly on particular services, while others offer a comprehensive range of services that cover most or all of these social services. Regardless of the breadth of offerings, the ability for community NPOs to successfully deliver on their respective missions requires three fundamental resource components: people, funding, and systems thinking.

Success-Dependent Resource: People

According to 2017 data, nonprofits in the U.S. employed 12.5 million workers, which is more than twice the number of people employed by the finance and insurance industry and roughly 100,000 more than the manufacturing industry (Salamon & Newhouse, 2020). Many community-focused NPOs that provide social services are typically organized by passionate founders who collaborate with a small number of paid staff and a remaining majority of unpaid volunteers. The labor force in these community...
NPOs is generally comprised of engaged and knowledgeable leaders, such as executive directors and boards of directors; trusted community partners; competent, efficient, and nimble staff; and dedicated volunteers working together to deliver high-quality programs and services to the individuals they support. With the exception of a few paid staff, the executive director included, the vast majority of the human support effort is provided by volunteers. According to the latest figures available from the Urban Institute, approximately 64 million Americans volunteer each year in the U.S. (Urban Institute: National Center for Charitable Statistics, 2021). Several approaches to calculating the value of volunteer labor exist, but perhaps one of the simplest methods is to calculate volunteer contribution to revenue. With this method, the total economic value of volunteer time is estimated to be equivalent to the amount of revenue an organization would lose if all of its volunteers left at once (Bowman, 2009). This valuation highlights the fact that NPOs with a majority volunteer human labor force simply could not survive if volunteer contributions were to significantly diminish.

*Success-Dependent Resource: Funding*

Like all public benefit organizations, community-focused NPOs require sustainable income strategies that not only fund the organization’s ongoing operations but also employ tactics and manage investments that are designed to ensure financial sustainability and potential future growth. Generally speaking, fees for goods and services from private sources (as opposed to government sources) represent about 50 percent of the nonprofit sector’s funding mix. Other sources of funding include individual donations large and small, bequests, corporation contributions, grants from private and government sources, interest from and program-related investments, tax revenue, and membership dues and fees (National Center for Charitable Statistics, 2014). Community engagement, dependency awareness, and fiscal oversight by the Board are among the key foundational components of financial sustainability, and effectively managing these factors can be more challenging for smaller organizations with fewer resources (Nonprofit Risk Management Center, 2016).

*Success-Dependent Resource: Systems Thinking*

The third fundamental resource component that can determine whether community NPOs are able to successfully deliver on their respective missions is *systems thinking*. Systems thinking can most simply be described as an approach to understanding interdependent structures of dynamic systems (Gopal, 2017), but it can also involve communicating with and aligning stakeholders. Operations and volunteer management systems are nothing if not interdependent and dynamic. Clear lines of responsibility and authority, as well as coordination, between staff and volunteers is important for effective program
delivery and the retention of employees and volunteers (SAMHSA, 2005). Retaining a stable workforce of general, direct-service volunteers is essential particularly for lean community NPOs given their outsized reliance of this labor to deliver programs and services to their constituents. Cultivating and retaining committed volunteer leaders is equally important, as the individuals in these middle management roles function more like paid staff, as line managers leading program teams, as lateral coordinators leading committees, and as vertical liaisons with bi-directional communication responsibility to both organizational leadership and general direct-service volunteers. Integrating the people, funding, and systems thinking resource components so critical for community NPO success becomes a bit more complex when the people take on multiple stakeholder roles within an organization. A nonprofit organizational structure that operates with this internal stakeholder complexity is one that provides programs and services for members as its core mission.

**Nonprofit Membership Structures**

*Informal Membership Programs*

Many social sector organizations form and function to serve individual members associated by a common cause. Some organizations offer membership and services at no cost, while others charge a nominal membership fee to provide access to members-only newsletters, priority registration for events, and so forth. Specifically, informal membership nonprofit organizations have members but are not official membership corporations. Informal members may pay a fee, but they are not defined in governing documents, nor do they have official voting privileges or decision-making authority within the organization, unless they serve on the Board of Directors (Mathias, 2020; Quarter et al., 2001). Examples of informal membership programs include nonprofit independent news and neighborhood information providers and publishers of subscription-based newsletters.

*Formal Membership Organizations*

A formal membership organization is a type of nonprofit that also functions on behalf of its individual members, however, members are granted explicit rights – including voting rights – in the governing documents. Voting memberships usually elect Board members, approve changes to the bylaws, and authorize contractual obligations. Members of formal membership organizations, such as trade associations and business coalitions, typically have a vested interest in the organization’s work, which can include advocacy efforts that benefit their particular sector (BoardSource, 2017).
Membership Organizations With a Public Interest

The third type of nonprofit membership organizing approach is the membership organization with a public interest that functions to advance specific causes on behalf of individual members (BoardSource, 2017). Members of this form of public interest organization are not granted official voting rights and do not stand to benefit financially or professionally. Rather, they benefit as constituents of the mission-directed work, often providing primary funding through membership fees in addition to volunteering their time. Parent-teacher associations and the American Heart Association are examples of this organizing approach.

Not all nonprofit membership organizations fall neatly into one of these three precise definitions, however. An example of a hybridized approach that combines elements of all three of the previously discussed nonprofit membership structures is the subject of this inquiry: the village model.

The Village Model

The main driver of the success of the Village model is its people power – It taps into the desire of individuals to make a difference and to create something that can help themselves and people similar to them.

Grantmakers in Aging (2013)

The village model is a member-serving nonprofit organization (MSNPO) structure that offers “an innovative consumer-driven approach that aims to promote aging in place through a combination of member supports, service referrals, and consumer engagement” (Scharlach et al., 2011). The consumers referred to in this definition represent village members. Village organizations are neighborhood-centered and comprised of members typically over the age of 60 who live in close proximity to one another. In exchange for a monthly or annual fee, villages provide practical services; social, cultural, wellness, and educational activities; and provide opportunities to engage in policy advocacy and volunteering in their local communities. Some also consider the classic village model as a housing-related solution for older people who want to maintain their independence by living in their own homes in the neighborhoods and near the people and resources they know but need varying degrees of support in order to do so. The national Village to Village Network was formed in 2010 as a centralized source for blueprints of best practices, organizing guidance, and other resources to support existing villages as well as those in development. As of 2017, there were over 200 villages in operation in the U.S. and another 150 were in the start-up process (Backus & Galucia, n.d.).
Much of the literature that exists today on the village model was contributed by Andrew Scharlach, PhD. Scharlach served as the Eugene and Rose Kleiner Professor of Aging at the Graduate School of Social Welfare and the director of the Center for the Advanced Study of Aging Services at the University of California, Berkeley (Berkeley Social Welfare, n.d.). For over 30 years, Scharlach’s research interests have largely centered on social and community efforts designed to promote healthy aging, including innovative approaches like the village model. Research on aging policy, aging programs and services, family caregiving, death and dying, and gerontological social work education are among the aging research subjects to which Scharlach has contributed. Scharlach provided a more comprehensive description of the village model in a policy analysis paper published in *The Gerontologist* in 2011:

Villages are grassroots organizations that provide community-dwelling older adults with a combination of nonprofessional services, such as transportation, housekeeping, and companionship, as well as referrals to existing community services, sometimes at a reduced rate [and] help older adults to obtain needed health and social services in order to increase their ability to age in place […] Villages are initiated and governed by the consumers they serve rather than community service providers and funded by annual membership dues rather than fees for individual services or grants (Scharlach et al., 2011).

Members engage with their respective village organizations to varying degrees. Approximately 25 to 50 percent of village members not only receive services themselves, but they are also highly involved volunteers throughout the organization (Scharlach et al., 2011). The village model differs slightly from village to village as each one reflects the people that decide to organize, the needs of the served community, financial and partnership arrangements, and other practical and social support resources available in close proximity. There are four primary village business models within which these variations exist, and these organizing structures are summarized in Table 2.1.

A majority of villages to date have organized under the grassroots business model. While some have retained this structure, others that have experienced tremendous growth have transitioned to a model that more closely resembles the hub and spoke approach that centralizes operations in order to achieve greater efficiency. Still other original grassroots villages are exploring partnerships with existing aging services agencies that act as fiscal sponsors and are more in line with the parent-sponsored model. No matter which model approach is used, the shared aim among villages is long-term sustainability. Which business model will facilitate the most efficient use of resources for any given village depends on complex internal and external factors. In California, for example, a coalition of village members coordinated their policy advocacy efforts over the last three years and successfully lobbied to have
villages named as a strategy as part of the California Master Plan for Aging (MPA) (Village to Village Network, 2021). The MPA was finalized in January 2021 and it aims to better prepare for the historic increase in the population over age 65 by providing a framework for investments from state and local governments, as well as the private and nonprofit sectors (California Department of Aging, 2021). As a component of the MPA goal of “Inclusion and Equity, Not Isolation,” the village model is receiving high-profile attention throughout California and the U.S., and model adaptations and potential new sources of funding are expected to result.

### Table 2.1 Village Business Models

<table>
<thead>
<tr>
<th>Model</th>
<th>Definition Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grassroots</td>
<td>Most common structure; stand-alone NPO administered by a combination of paid staff and volunteers. Members are encouraged to participate in governance by serving on the Board of Directors and Board-level committees</td>
</tr>
<tr>
<td>Parent Sponsored</td>
<td>An existing social service and aging service organization that serves as the parent and fiscal agent that supports the Village by providing operations resources (office, legal, financial management staff; office space)</td>
</tr>
<tr>
<td>Hub and Spoke</td>
<td>Combines multiple communities or neighborhood groups to share operational costs and labor; multiple smaller villages (“spokes”) geographically located near/around a central village (“hub”) that manages operations functions for all</td>
</tr>
<tr>
<td>Village with TimeBanks™</td>
<td>Combines the village model with TimeBanks™ that allow members to exchange or earn time dollars for volunteering, which are exchanged for services or donated to a community pool to benefit those unable to volunteer; creates a lower fee structure for village membership</td>
</tr>
</tbody>
</table>

Source: Summarized from Figure 2 in Capital Impact Partners (2015).

As village models continue to adapt to their local environments, it is important to not lose sight of the defining features of this unique approach to aging services. A 2017 study examined the village typology, and researchers found that villages shared seven core characteristics, regardless of business model variation (summarized in Table 2.2; Lehning et al., 2015).
Table 2.2  Core Characteristics of the Village Model

<table>
<thead>
<tr>
<th>Core Characteristic</th>
<th>Defining Measure</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grassroots</td>
<td>Older adults from the community “very” or “extremely” involved in creating the program</td>
<td>88.4</td>
</tr>
<tr>
<td>Membership driven</td>
<td>Older adult members on governing boards</td>
<td>76.8</td>
</tr>
<tr>
<td></td>
<td>Members with some involvement in administrative tasks, providing support and services, and advocacy</td>
<td>89.8</td>
</tr>
<tr>
<td>Self-governing</td>
<td>Freestanding organization not operating as a division or program within another organization</td>
<td>78.3</td>
</tr>
<tr>
<td>Self-supporting</td>
<td>At least 50 percent of the total budget is covered by membership dues, fees for individual services, and/or individual donations</td>
<td>75.4</td>
</tr>
<tr>
<td>Vetted provider discounts</td>
<td>At least one preferred provider offers discounts to members</td>
<td>75.4</td>
</tr>
<tr>
<td>Provides services</td>
<td>Any of a list of 25 services provided by Village staff and/or volunteers</td>
<td>100.0</td>
</tr>
<tr>
<td>Social activities and engagement</td>
<td>Any social, cultural, or recreational gatherings provided by Village staff and/or volunteers</td>
<td>85.5</td>
</tr>
</tbody>
</table>

Source: Summarized from Table 1 (n=69) in Lehning et al. (2015).

A grassroots organizing effort with high member involvement that provides services as well as social activities and engagement are the most widely shared characteristics found in this study of village models. Researchers then delved deeper to identify three distinguishing dimensions in the consumer-driven approach: (1) the extent of member involvement; (2) the means of providing support and services, and (3) the mix of funding sources. These three dimensions were then applied to arrive at a village typology (Table 2.3).
Table 2.3  Typology of Villages

<table>
<thead>
<tr>
<th>Member Involvement</th>
<th>Means of Providing Support and Services</th>
<th>Dominant Funding Source</th>
<th>Basic Models</th>
<th>Frequency (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Volunteers</td>
<td>Membership Dues</td>
<td>Prototypic Village</td>
<td>22.0</td>
</tr>
<tr>
<td>High</td>
<td>Volunteers</td>
<td>Grants/Donations</td>
<td>Village With External Funding</td>
<td>15.2</td>
</tr>
<tr>
<td>Low</td>
<td>Professionals</td>
<td>Membership Dues</td>
<td>Aging Services With Member Funding</td>
<td>15.2</td>
</tr>
<tr>
<td>Low</td>
<td>Professionals</td>
<td>Grants/Donations</td>
<td>Aging Services Organization</td>
<td>28.8</td>
</tr>
<tr>
<td>Varies</td>
<td>Varies</td>
<td>Varies</td>
<td>Not Otherwise Specified</td>
<td>18.5</td>
</tr>
</tbody>
</table>

Source: Summarized from Table 2 (n=59) in Lehning et al. (2015).

Notes:

- **Member Involvement**: High = very/extremely involved in creating the Village, >50% of Board members are Village members, at least 50% of members volunteer with the organization; Low = somewhat not involved in creating the Village, <50% of Board members are Village members, and <50% of members volunteer.

- **Means of Providing Support and Services**: Volunteers = Volunteers provide a greater number of services than Village staff or external professionals; Professionals = Staff/External professionals provide more services than volunteers

- **Funding Sources**: Membership Dues = Account for >50% of total budget; Grants/Donations = Account for >50% of total budget

While nearly 30 percent of villages organize under an institutional version of the model that is designed to operate as a program under larger aging services organizations, the prototypical village model relies heavily on highly involved volunteers to provide nonprofessional services (Backus & Galucia, n.d.; Lehning et al., 2015). Members serve and collaborate as volunteers in various capacities throughout the organization, including program and committee-level development and leadership, policy advocacy, and governance service on the Board of Directors in addition to the provision of direct services to peer members.

**Villages and the Collaborative Leadership Paradigm**

In a 2001 publication entitled “Building Leadership,” professor and senior research scientist at the Institute for Social Research, Greg Markus, discusses the collaborative leadership paradigm – a perspective that is helpful in understanding the internal dynamics of the village model. Markus summarizes the definition of collaborative leadership as:
… a willingness to enhance the capacity of another for a common purpose: collaborators willingly yield a measure of their individual control or authority to create a collective power that transcends the sum of its parts. In this respect, the collaborative leadership paradigm draws upon the stewardship and servant leadership models. Stewardship turns hierarchical leadership on its head – a “lowerarchy” in which the primary task of “leaders” is to ensure that the needs of organizational members are being served rather than to engage in the exercise of privilege and control (Markus, 2001).

The concept of a lowerarchy, as Markus discusses, takes on more complexity when primary stakeholder constituents are also volunteer member-leaders who enjoy the freedom to create and lead programs or initiatives based on the interests and needs that naturally emerge over time. Organic program development in this collaborative member-driven environment can be successful when organizations are of a relatively small size and scope, however, challenges associated with a lack of more formal internal processes become evident as MSNPOs expand their membership rosters, program offerings, and geographic service areas.

The symbiotic design and grassroots nature of MSNPOs like the village model can be among their greatest strengths, but this approach of organizing from the ground up can also lead to blurred program boundaries, inefficient operations, and informal communications processes that can result in a siloed information structure and confusion about the strategic direction of the organization overall. Communication gaps stemming from an overreliance on informal information sharing across program teams and bi-directionally between various levels of leadership and general members can result in an uninformed (or misinformed) membership. An organic internal communication style that may have been adequate for a small MSNPO serving a few dozen members can slowly hamper a growing organization’s ability to efficiently and effectively deliver value and benefits to members (i.e., the programs provided in exchange for membership fees) and achieve its mission, and thus informal communication can jeopardize sustainability. Fractured internal communications processes can also weaken the effectiveness of the natural collaborative leadership approach and demotivate passionate member volunteers and leaders, which could have negative impacts and longer term implications for an MSNPO. From this perspective, formal internal communications processes, such as those commonly practiced in private sector organizations, have the potential to positively impact some of the most entrenched sustainability challenges by strengthening program management and integrating strategic planning throughout the organization.
Considering MSNPOs Through a Private Sector Lens

As introduced earlier, member-driven MSNPOs are uniquely structured with member stakeholders holding multiple roles: as constituents who receive the program benefits and as:

- **volunteer leaders** who govern, manage internal program teams, drive outreach to new partners and members, and also deliver program benefits to peer members;
- **funders** who provide nearly all of the financial resources for the organization in the form of membership fees; and
- the **primary drivers of** the member **volunteer systems** that collaboratively work to achieve the organizational mission.

Committed volunteer leaders in MSNPOs share a number of characteristics with employees who make professional contributions in exchange for pay, including:

- that they are both human workforces that carry out the day-to-day work of an organization, for which its success is in their self-interest;
- regular and effective internal communication informs and engages individuals in both of these workforce groups in similar ways by helping them understand their role and the part they play in supporting an organization’s strategic goals (Weal, 2014); and
- informed and engaged workforce groups feel acknowledged, listened to, more satisfied, and motivated, thus, they become an invaluable asset that is more committed to, and embedded in, their organization (Weal, 2014; Gillis, 2011).

According to a 2010 Gallup Consulting report on the effect of employee engagement on business outcomes, a distinguishing feature of top performing organizations is having a comprehensive internal communication strategy:

Within the best performing organizations there is a cultural alignment between the employees and the company, paired with a strategic alignment between activities and company goals. These organizations use their corporate communication touchpoints to reinforce their commitments to employees and customers (Gallup Consulting, 2010).

From this perspective, effective internal communication used strategically and structured appropriately for the business model can facilitate greater workforce engagement, connection with the organization, and ultimately organizational success in private sector settings as well as for MSNPOs.

In a 2011 study, Welch offers a conceptual model as one way of illustrating the potential impact of internal communication on employee engagement at the organizational level (Figure 2.1). Internal communication aspects that promote organizational commitment and a sense of belonging, and an
awareness and understanding of changing organizational environments and goals, are positioned in the model as mediating variables between senior leadership and employee engagement (Welch, 2011). Meaningfulness, safety, and availability represent the psychological conditions necessary for engagement, which is illustrated as the emotional, cognitive and physical dimensions that are associated with dedication, absorption (or engagement), and vigour (or a positive affective response to interactions in the work environment), respectively (Kahn, 1990). The psychological, emotional, cognitive, and physical aspects illustrated in the model proposed by Welch call attention to the fact that there are multiple factors that can influence the degree to which employees (or members and volunteers in the case of villages) engage in their organizational environment. While Welch offers a perspective of internal communication that is simplified in the organizational levels that are included, an expansion of this model for MSNPOs like villages would include provisions for middle management teams.

**Figure 2.1 The Employee Engagement Concept and Internal Corporate Communication: a Conceptual Model**

Source: Welch (2011), p. 340, Figure 1.
In an earlier study, Welch and Jackson (2007) offered such an integrated internal communication model that represents dimensions more closely related to the internal village organizational structure. In Figure 2.2, the diagram “Asymmetrical Internal Corporate Communication” illustrates a typical one-way directional message flow (within the dotted line boundary that represents the internal environment) that emanates from strategic managers at the center of the model toward employees and the goals represented at the arrow tips. An excerpt of a related diagram, “Four Dimensions of Internal Corporate Communication,” Welch and Jackson take into account middle leadership groups by drawing a new dotted line boundary around an expanded internal environment to capture information exchanges between internal project, team, and line management groups, in addition to the asymmetrical internal corporate communication environment depicted at the center. The environment illustrated in the “Four Dimensions” model is the most similar among these model variations to the internal communications structure that exists in the prototypical village model.

**Figure 2.2 Dimensions of Internal Communication**

![Diagram of Asymmetrical Internal Corporate Communication and Four Dimensions of Internal Corporate Communication](image)

Source: Excerpted from Welch and Jackson (2007); p. 186, Figure 3; p. 192, Figure 4.

In a 2012 study that explored employee-centric approaches to assessing the value of internal communications, Ruck and Welch offered a conceptual model that aimed to draw attention to employee
information needs in terms of both content and channel (Figure 2.3). While the Ruck and Welch engagement model was developed for the private sector, the conceptualization of engagement as an output that results from employee-centered internal communication is directly relevant to MSNPOs like villages if volunteers are substituted for employees and member-leader volunteers are exchanged for line managers. The conceptual engagement model provides an assessment framework that fulfills the “cognitive and social psychological aspects of communication” by including both individual role and organizational communication needs.

**Figure 2.3 Conceptual Model of Employee Questions to be Addressed Through Line Manager and Corporate Internal Communication**

Source: Ruck and Welch (2012), p. 300, Figure 4.

Before developing an internal communications strategy, it is important for MSNPOs like village organizations to consider the communications dynamics and organizational factors that specifically influence and engage their primary workforce, namely member-leader and direct-service volunteers.
Unlike employees who are financially incentivized, volunteers and committed member-leader volunteers contribute their time to nonprofit endeavors without any formal reward and are instead motivated to engage by other factors, including social interaction with others and how closely they identify with an organization’s values, mission, and culture (Bauer & Lim, 2019). Thus, effective person-centered internal communications is an important component to volunteer motivation, as well as a key input to include when calculating the value that village volunteers contribute to their organizations.

**Volunteerism**

Knowing the extent of volunteer motivation, NPOs can become empowered and equipped to reap fruitful contributions from engaged volunteers, thus enabling quality service for mankind, and helping NPOs succeed in their domain.

Ilyas et al. (2020)

The *Volunteer Management Handbook* defines a volunteer as “anyone who performs volunteerism,” which involves three fundamental components: active involvement that is uncoerced, not motivated by financial gain, and focused on the common good (Connors, 2011). While the term volunteerism (n.) dates back to the early 17th century in reference to the armed forces, most historical accounts of the origins of volunteerism in America point to Benjamin Franklin, who founded the first volunteer fire house in 1736 (Ott, n.d.). Challenges of poverty, women’s rights, and the abolition of slavery in the 1800s gave rise to the social reform movement and the founding of the United Way, American Red Cross, and other institutions that organized to align volunteers with the needs of fellow citizens (Dreyfus, 2018). This social change organizing principle is not far from the village model and other MSNPOs. As discussed earlier, nonprofit villages rely heavily on volunteers to support a wide range of activities, from episodic or task-based practical member support to governance (*Village Model*, 2021).

Regardless of village typology, volunteers are an essential component of the organizational model, so it is important to understand their motivations and the factors that contribute to their satisfaction.

**Volunteer Motivation**

Researchers who study the sources of volunteer motivation have examined various aspects of this activity and have developed a number of theories, as well as reliable and valid measurement tools (Dwyer et al., 2013). Clary et al. (1998) studied volunteerism through a functionalist lens and devised the Volunteer Functions Inventory (Dwyer et al., 2013; Fetzer Institute, n.d.), which identified six broad functions that volunteering serves for individuals:
1. expressing humanitarian values;
2. searching for understanding;
3. obtaining career benefits;
4. gaining protection from feelings of guilt about being more fortunate than others;
5. enhancing feelings of self-esteem; and
6. fitting in with important social groups.

Variations in the relative importance of each of these functions differs from person to person, and the research suggests that individual volunteer satisfaction is influenced by how closely the motives of a volunteer are aligned with their service experience (Dwyer et al., 2013). These findings highlight the importance of understanding how individual motivations of volunteers are linked with volunteer satisfaction and retention, especially for heavily volunteer-dependent nonprofit organizations such as MSNPOs. Two of the many theories that are relevant to volunteer motivation in the context of MSNPOs are resource dependence theory and self-determination theory.

Resource Dependence Theory

Resource dependence theory (RDT) was first developed in the 1970s by Jeffrey Pfeiffer and Gerald Salancik for application to the private sector (HRZone, 2013). RDT is based on the perspective that an organization’s need to access resources from its local environment significantly influences its behavior, perceptions, and likelihood of success (Lehning et al., 2015; Pfeffer & Salancik, 2003). Writing in a chapter entitled “Dynamism in Action: Leadership of the Nonprofit Enterprise” in Leadership in Nonprofit Organizations: A Reference Handbook, author Lisa Gale Van Brackle discusses RDT in the nonprofit context. Van Brackle offers the perspective that NPOs have multiple internal and external stakeholders operating in numerous environments, all with varying degrees of influence on the organization’s ability to achieve its mission. Within the NPO context, outcome achievement (in whatever way(s) this is measured) validates that available resources were used effectively and internal processes were used efficiently. The largest resource on which many NPOs depend is the volunteer labor force, thus understanding volunteer motivation and satisfaction and how they relate to outcomes becomes paramount.

In a study that examined volunteer engagement and financial stability, Ilyas et al. (2020) used the RDT framework to uncover strategic themes associated with volunteer motivation. Researchers identified skill building, the fulfillment of ulterior motives, a culture of administrative support, transparency, and trust building to be among the strategies important for volunteer retention as well as financial stability. Furthermore, research findings indicated that in order for NPOs to achieve sustainability and successfully deliver on their mission, it is important to empower volunteers and strengthen their psychological
association (i.e., organization identification or embeddedness) with the organization to ensure high rates of retention. Operating with multiple internal stakeholders and a reliance on empowered volunteer labor and leadership as primary resources, an RDT perspective reinforces the importance of volunteer satisfaction and retention in MSNPOs.

**Self-Determination Theory**

Also relevant to volunteers, members, and those who occupy both roles is self-determination theory (SDT), which explores human motivation and personality based on one’s inner resources for personality development and behavioral self-regulation (Ryan & Deci, 2000). Empirical research based on SDT focuses on the conditions that facilitate or hamper the natural processes of human motivation, thus a good deal of the research literature on employee and volunteer motivation includes SDT as a framework (Ryan & Deci, 2000). De Clerck et al. (2020), for example, studied the relationship between motivating and demotivating leadership styles and volunteer capacity in all-volunteer NPOs. Motivating styles examined include *autonomy-supportive leadership* (where leaders center curiosity, flexibility, and responsiveness to others) and *structuring leadership* (where leaders align activities with others’ skills and provide guidance for success). Demotivating styles examined include *controlling leadership* (where leaders rely on narrow thinking to proscribe preconceived actions) and *chaotic leadership* (where leader behavior is unpredictable and inconsistent). The researchers found that autonomy-supportive and structuring leadership styles were positively associated with volunteer capacity, reinforcing the importance for NPO leaders to remain open to the needs and aspirations of volunteers while strategically aligning their skills to meet both their personal goals and those of the organization.

SDT reasons that when one internalizes behavior into their sense of self, it will be sustained over time, and having a sense of autonomy while feeling connected to others facilitates this process. It is through this lens that Dwyer et al. (2013) found that transformational leadership can significantly influence volunteer satisfaction. Transformational leaders are highly influential and inspire others to achieve impacts beyond their own self-interest, and this leadership style has been more closely linked with positive organization outcomes (Dwyer et al., 2013). RDT and SDT are each reflected to some degree in the MSNPO structure. Leadership supports volunteer autonomy and member-volunteers and member-leaders are empowered and demonstrate a commitment to the organization. Given that members represent approximately 25 to 50 percent of all volunteers in village organizations, satisfaction and retention of this valuable segment of the labor force has a significant bearing on village membership numbers and the operating revenue fueled by their fees. Furthermore, highly committed member-leaders
could be viewed as the volunteer category that is the most connected, or identified with, their village organization, and therefore satisfaction and retention is particularly critical for this group.

The Value of Volunteers to Community-Based Programs

Member-leaders in a community-based MSNPO such as a village organization are typically in positions that can be described as middle management (or line managers in the private sector examples) that oversee programs and initiatives versus general volunteers who deliver episodic or task-based direct services to members. General volunteers commonly commit to tasks and record their direct service time within volunteer management software platforms. A similar formalized process for capturing management labor, however, does not exist in some cases and, therefore, the financial, operational, and social benefits that are created by member-leader contributions can go underreported and undervalued. Community-based organizations face increasing pressure to demonstrate the cost-effectiveness of their programs, yet no universal approach to estimating the full value of human effort in this context has been established and calculation inputs can vary widely.

In a study involving a community-based MSNPO that provides aging services, Scharlach explored the use of a social return on investment (SROI) approach to attempt a more accurate estimate of volunteer value (Scharlach, 2015). Three ratios were used in the SROI assessment: the ratio of value added to program costs, the ratio of volunteer output to volunteer program costs, and the ratio of participant benefits to membership fees paid (Scharlach, 2015). Rather than the standard market replacement cost approach, Scharlach considered additional direct and indirect costs and benefits – including to family members and society at large and in potential medical and long-term care cost savings. Scharlach calculated that while the financial value alone equated to 90 percent of program costs, the combined financial and social value of the volunteer aging services provided was more than three times the program cost, demonstrating the significant undervaluation of volunteer-assisted aging programs. When underreported volunteer leadership time is taken into account, Scharlach’s undervaluation plunges further. Uncaptured labor means uncaptured capacity, which directly affects an organization’s ability to realistically address long-term sustainability.
Sustainability Challenges For The Village Model

One key question [about the village model] is sustainability, in particular whether a given community has the capacity to advance age-friendly development on an ongoing basis.

Grantmakers in Aging (2013)

Greater financial reserves and funding sources; membership numbers and recruitment; leadership development; and formal policies, procedures, and collaboration agreements are among the primary sustainability challenges that villages have been grappling with since the model was developed (Lehning et al., 2015; Scharlach et al., 2017). The various village business models, characteristics, and typology discussed earlier add complexity and different approaches to defining and achieving sustainability. Capital Impact Partners (CIP) is a certified community development nonprofit that connects communities to capital for social change. In 2009, CIP partnered with the inaugural Beacon Hill Village to develop and manage the national Village to Village Network. In a 2015 report entitled “Sustaining the Village Movement,” CIP discusses village sustainability as an ongoing process rather than a finite goal:

Sustainability is often referred to as a destination: ‘When our organization becomes sustainable, we will be able to…’ is often expressed by nonprofit leaders. However, sustainability is a combination of multiple factors that guide the organization, its leadership and funders to adapt to the shifting market while achieving their mission (Capital Impact Partners, 2015).

Taking into account that each village is defined by its own unique circumstances, sustainability can mean something different to different people. Drawing once again from RDT, the perception of sustainability among village leaders may be heavily influenced by whether they believe that they are effectively leveraging local resources, such as volunteers, financial support, and service provider partnerships from the community (Lehning et al., 2015).

In an attempt to find a common through-line among villages on this matter, CIP identifies three interconnected factors that combine to best define village sustainability: leadership, adaptability, and program capacity (Capital Impact Partners, 2015). These sustainability factors, the authors explain, will differ depending on where an organization is in their lifecycle. Are they in start-up mode? Have they undergone growth and restructuring? Have they reached maturity? Understanding the lifecycle stage a village is operating in can help leadership determine the best strategies for achieving greater sustainability, according to the CIP blueprint. Examples of how the characteristics of village Board leadership can change depending on their lifecycle stage is provided in Table 2.4.
Table 2.4  Lifecycle Stages of Village Board Leadership

<table>
<thead>
<tr>
<th>Board Characteristics</th>
<th>Start-Up Stage (Development)</th>
<th>Adolescent Stage (Growing)</th>
<th>Mature Stage (Sustaining)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relationship with Executive Director (ED)</td>
<td>May just be recruiting an ED; performance reviews are informal</td>
<td>ED authority and operational function clarified; performance evaluation process is formalized; succession planning begins</td>
<td>Performance evaluation of ED is formal; succession plan in place</td>
</tr>
<tr>
<td>Role and Activities</td>
<td>Active role in management and oversight</td>
<td>Formalized roles defined in job descriptions</td>
<td>Role in relation to ED clarified; operational role reduced; policy and fundraising functions increase</td>
</tr>
<tr>
<td>Size, Structure, and Composition</td>
<td>Small and homogenous, comprised of founding members</td>
<td>Expanded to include community members with particular expertise</td>
<td>Formal nomination process established; representation and skill sets diversified; committees and task forces are developed</td>
</tr>
<tr>
<td>Board Development</td>
<td>Local word-of-mouth recruitment</td>
<td>Recognition, discussion of performance; improvement goals identified</td>
<td>Formal assessment conducted; development plan created</td>
</tr>
</tbody>
</table>

Source: Summarized from Figure 5 in Capital Impact Partners (2015).

As villages and their governing Boards mature, the ability of leadership to effectively implement strategic functions (such as policymaking and revenue diversification) and build beneficial collaborations (including establishing committees and task force groups) become key factors in sustainability (Lehning et al., 2015; Capital Impact Partners, 2015). However, in reality, the transition from one lifecycle stage to the next does not always progress along the same timeline for all leadership characteristics. A Board may have reached maturity with regard to their relationship with the Executive Director and become a more institutional versus a less formal founding body, but their internal operations and communications functions may lag a stage or two behind. It is during these mixed transformational periods where villages could draw on best practices outside of the village model and the nonprofit sector as a whole to achieve greater sustainability, particularly when it comes to internal communications. Among the many
sustainability challenges facing the village model, establishing more formal internal communications processes and plans could be strategically impactful and immediately feasible.

**Internal Communications**

*Communication leads to community, that is, to understanding, intimacy and mutual valuing.*  

Rollo Reece May

**A Brief History**

In an article summarizing the history of communication, author Robert D. Hay references studies by John Locke and David Hume dating back to 1689 that are thought to be the first formal research on the topic, exploring “the real world; its expressions in language and signs; its communicability; its use with social and ethical systems” (Hay, 1974). In terms of communications within organizations, Hay describes the early 1920s writings and teachings of Dale Carnegie as ones considered to be the first to popularize communications in a business context by connecting the skill with managerial success. Yet, it was not until the 1990s and early 2000s when internal communications as a communications management specialization began to grow in the U.S. and Europe as globalization, economic crises, outsourcing and other factors led to declining employee trust and loyalty (Tkalac Verčič et al., 2012). Many communications associations launched around this same time. The United Kingdom established the Institute of Internal Communication in 2010, and the U.S. organized the Council of Communication Management – signaling the elevation of internal communications as its own important discipline (Tkalac Verčič et al., 2012). A little over 10 years later, however, internal communications remains a murky field with a notable absence of dedicated scholarship. A recent search for the phrase “internal communication” in the American Communication Journal, the official peer-reviewed journal of the American Communication Association, produced not one article that used this phrase (*American Communication Journal*, 2021). Existing literature on internal communication is particularly spare within the nonprofit sector and can be found primarily within other disciplines by different terms and as a component of organization and management theories.

**An Elusive Discipline & Nomenclature Challenges**

Organizational development, change management, public relations, human resources, business management, strategic communications, and marketing are among the multiple disciplines within which internal communications exists and not always by this term. A study conducted among members of European business communication associations that explored appropriate names for the field revealed that
while *internal communication* is the term that garnered the most agreement from practitioners, the functions associated with internal communication have also been described as internal marketing, employee engagement, business communications, employee communications, employee relations, relations with internal publics, corporate communication, leadership communication, and management communication (Tkalc Verčič et al., 2012; Tortosa et al., 2009). Communications professionals also did not universally agree whether internal communications should be a field of its own. Most believed it should be a part of the broad communications discipline, with fewer agreeing it should be part of human resources, and still fewer agreeing it should be its own discipline. A negligible few thought internal communications should be part of marketing (Tkalc Verčič et al., 2012).

In a paper focused on internal communication from a stakeholder perspective, authors Welch and Jackson (2007) discuss a phenomenon within the scientific literature whereby other literature reviewers repeatedly site the same few articles, many pointing to a popular definition of internal communication offered by Frank and Brownell (1989):

[...] the communications transactions between individuals and/or groups at various levels and in different areas of specialisation that are intended to design and redesign organisations, to implement designs, and to co-ordinate day-to-day activities (Frank and Brownell, 1989, pp. 5-6).

Welch and Jackson (2007) clarify that this passage “actually refers to organisational communication as a field of study and practice, not internal communication or employee communication as a part of integrated corporate communication.” The authors go on to describe how the repeated references to the same internal communications literature has created a “continuous loop” that keeps an outdated transactional definition of organizational communication alive and cemented to the definition of internal communications (Welch and Jackson, 2007).

A 2009 study by Tortosa et al. discusses internal communication as marketing function, adopting a definition of *internal marketing* from Rafiq and Ahmed (2000):

[...] the planned effort, using marketing as an approach to the worker, that [...] is able to align, motivate, interfunctionally coordinate and integrate employees towards the effective implementation of functional and corporate strategies, so as to achieve the satisfaction of the external customer through a process that will make possible satisfied, motivated and customer oriented employees (Rafiq and Ahmed (2000).

The Rafiq and Ahmed (2000) definition of *internal marketing* incorporates language similar to that referred to by Welch and Jackson (2007) for *internal communication*, but also expands the definition to
include elements related to strategy and employee motivation and satisfaction, comparable to the discussions cited earlier linking internal communication with engaged workforce groups (Weal, 2014; Gillis, 2011).

Definitions Adopted Herein

As previously described, this exploratory research is focused on the strategic opportunities associated with the implementation of more formal internal communications practices within the village MSNPO model. Given the scarce scientific literature on internal communication within the nonprofit sector, this inquiry has drawn upon private sector literature where operations structures and employee engagement processes are applicable to the member-driven village model. One of the most relevant studies to this research examined the strategic potential of internal communication in international nongovernmental organizations. It is this study conducted by authors Hume and Leonard (2014) from which the definition of strategic internal communications used for this research has been derived.

Based on assertions from Puth (2002), Hume and Leonard (2014) discuss the importance of including a clear strategic intent in internal communications. Puth (2002) contends that communicating this intent is required to achieve strategic alignment of relevant parties within an organization and offers four message components he believes are essential to communicate to all internal stakeholders:

1. The context within which the strategy develops;
2. Where the strategy is taking them;
3. Where they currently are; and
4. How they are going to get between the two.

It is with these four components in mind that Hume and Leonard (2014) offer the following definition of strategic internal communication that guides this exploratory research: The strategic management of communication to align the organization’s internal stakeholders with its strategic intent.

This research also references key elements in its analysis that are recommended for inclusion in the strategic internal communication process, whereby:

- strategic internal communication is integrated into an organization’s overall communications strategy (Hume and Leonard, 2014);
- leadership at all levels of the organization are committed to the internal strategic process (Puth, 2002);
• internal communication frameworks are rooted in reciprocity and cooperation and designed to be symmetrical where possible (versus asymmetrical communication that seeks to persuade or control behavior (Figure 2.2; Men, 2014); and
• a holistic, interrelated infrastructure is established that considers all stakeholders (Hume and Leonard, 2014).

Strategic Internal Communications

As discussed previously, internal communication can facilitate meaningful engagement between all internal stakeholders, and having people who feel connected to one another and identify strongly with the mission of their organization can lead to greater organizational success. Communication becomes strategic when it is integrated, coordinated, and ongoing (Patterson & Radtke, 2009). Strategic internal communications asks the who-what-where-when-how questions related to an organization’s goals in order to engage stakeholders in coordinated efforts to achieve a mission (Patterson & Radtke, 2009). In this way, strategic internal communication matters particularly to mission-driven NPOs as the process can get all stakeholders on the same page working from the same information in coordination focused on an organization’s goals. An internal strategic communications framework can:
• Help set priorities and clarify future direction;
• Improve performance and stimulate creative thinking;
• Build teamwork and expertise; and
• Use limited resources effectively (Patterson & Radtke, 2009).

For MSNPOs like villages, the ability to use limited resources effectively can be the difference between an organization that struggles or achieves greater sustainability.

The grassroots program development process that is common within prototypical villages is an example of a way that silos can emerge and create a number of internal challenges that threaten everything from program service delivery to a lack of trust in leadership. In the absence of effective and strategic internal communication practices within MSNPOs, program teams operating primarily in their own environments may lack information about complimentary or overlapping efforts in other program areas, they may receive messages that are inconsistent and untimely, and they may receive incomplete or incorrect information by word-of-mouth (or no information at all) about organizational factors that impact their ability to contribute effectively. This inefficient patchwork of communication can create “islands of communication” resulting in a disintegrated internal communications process that has implications on an
organization’s ability to weather crises, maintain trust among internal and external stakeholders, and maximize their potential (Gillis, 2011).

In research on functional silos and internal communication, Neill and Jiang (2017) argue that an integrated communication approach is not only necessary to solidify perceptions of leadership integrity and transparency among stakeholders, but also to serve an internal strategic purpose by ensuring that stakeholders are engaged. As Ruck and Welch (2012) offered in their stakeholder-centered conceptual model of engagement (Figure 2.3), integrated communications that are facilitated by middle leadership as well as organization level strategic communication can strengthen stakeholder identification with the organization by considering their voices and ensuring they are well informed and supported. Therefore, it appears evident that strategic internal communication that is integrated, coordinated, consistent, and sustained is necessary if MSNPOs such as villages are to make significant headway toward greater sustainability.

In a recent thesis that investigated the influence of communication and participation on the realized strategy of NPOs, author Bianka Sabert examined various dynamics that can be present in and between informal and formal internal communication. Sabert offers a conceptual framework that illustrates how formal and informal internal communication can work together facilitated by transparency to integrate stakeholder input and empowerment to achieve strategic goals (Figure 2.4, Sabert, 2020).

**Figure 2.4 Conceptual Framework: How Communication and Participation Influence Strategies That Are Realized as Deliberate**

Source: Sabert (2020), p. 247, Figure 5.5.
Using three common strategic stages – formulation, implementation, and realization – Sabert’s conceptual model plots formal and informal communications at the bottom with participation concepts (such as inputs, consensus, and empowerment) placed above and, in some case, overlapping. Regarding formal internal communication in NPOs, Sabert found that messages need to account for the organizational context and purpose, and the message content and tone should be inclusive and mindful of differences in audience gender and national culture. Sabert also concluded that a high level of communication (or the amount of information shared) does not necessarily ensure a higher level of success with achieving strategic goals. NPOs should employ a thoughtful approach that considers the timeliness of internal strategic communication, the severity of change that the organizational strategy will prompt, the extent to which internal stakeholders are affected, and the strength of the organizational culture (Sabert, 2020).

Drawing From the Private Sector

In their book, “Successful Employee Communications,” authors and internal communications and public relations professionals Sue Dewhurst and Liam FitzPatrick discuss various tools, models, and practices that they identified through a collection of case studies on well-known private sector organizations such as the BBC, Unilever, and Cisco. Dewhurst and FitzPatrick largely position their findings and recommendations from an internal communicator’s role within a private sector organization, and many of the insights are directly applicable to the nonprofit sector and MSNPOs specifically. Similar to the perspective discussed earlier, committed volunteer leaders in MSNPOs share a number of stakeholder characteristics with private sector employees. Given the lagging internal communications literature and best practices developed for the nonprofit sector, MSNPOs can draw on practices developed for the private sector and adapt the framework to meet the specific needs of their organizational environment and its unique stakeholders.

In a chapter that discusses considerations for developing a comprehensive employee communications plan, Dewhurst and FitzPatrick offer an accessible framework for establishing comprehensive internal communications objectives that first focus on what an organization wants stakeholders to do, how they would like them to feel, and what they want them to know as an important phase that precedes crafting detailed “SMART” objectives that are specific, measurable, achievable, realistic, and timely (Dewhurst & FitzPatrick, 2019). Getting clear on the behaviors, perceptions, and information gaps that exist among internal stakeholders is a practice that even small nonprofit organizations with fewer resources can tap into to increase the effectiveness of their internal communication in both practical and strategic terms.
Research Purpose and Questions

As discussed, the village concept has been facing the challenge of achieving greater sustainability since its inception in 2009. Depending on the geographically influenced conditions within which a village operates, founding villages can draw from four primary village business models to select the one that fits their unique conditions and then further adapt that model to best meet the needs of their member stakeholders. Despite the availability of best practices, open blueprints, and supporting coalitions and associations that work to share knowledge and support the growth of the village movement, the village concept in all of its forms continues a quest for more sustainable funding sources and robust financial reserves, long-term mutually beneficial partnerships and collaboration agreements, and an ever-expanding membership. It is notable that these primary sustainability initiatives are largely focused externally and require significant and ongoing resources from village leadership. Considering this perspective, turning leadership attention inward to ensure internal policies and procedures are optimally designed to serve the organization and its current membership is also important to long-term sustainability. In this way, internal communications processes and their alignment with strategic goals become just as important as external sustainability efforts, if not more. Focusing the passion of a committed membership from within is a practical opportunity to realize both internal and external sustainability rewards.

With this village landscape in mind, the purpose of this research is to …

- Explore operating and internal communications processes among high-value member leaders in an expanding pioneer village;
- Investigate the level of member-leader awareness of organizational strategic goals and the role that internal communication plays in this awareness;
- Identify opportunities where a more formal internal communication framework could be applied to better inform and align strategically complimentary program teams; and
- Provide a strategic internal communications framework and model that channels the efforts of high-value member leaders to help achieve organizational goals.

Specifically, this study is centered on the following research questions:

RQ1: What formal internal communications processes exist to promote intergroup knowledge sharing?

RQ2: How can internal communications be formalized and aligned to collaboratively achieve organizational strategic objectives?
Section 3: Approach and Methods

Research Approach

Very little research has been conducted on internal communications practices within NPOs, and this is particularly true for MSNPOs. This exploratory research project is situated within this scant research landscape and uses a qualitative approach with a constructivist perspective to examine how members perceive, experience, and interact at different levels of leadership in their organization through internal communications practices and to what degree communications practices are intentionally designed to align efforts by internal stakeholders to achieve organizational strategic goals.

Research Methods

Research Design

Semi-structured interviews were conducted with member and volunteer leaders in a village organization located in California that served as a case study. The case study organization (CSO) was formed in 2010 with a mission to empower older people to age in community through programs, services, and policy advocacy. A lean team of paid staff include an Executive Director, an Operations/Volunteer Manager, a Project Coordinator, a Program/Member Services Liaison, and a certified Social Care Manager. The CSO Board of Directors is comprised of 16 active Board members, three sustaining Board members, and two ex-officio Board members. Board members volunteer their time contributing to one or more of the eight Board-level committees, and several members also contribute time to strategic initiatives that fall outside normal committee business. The CSO is organized under the grassroots village business model (see Table 2.1), is comprised of all seven core village characteristics (see Table 2.2), and is considered a prototypical village with high member involvement (see Table 2.3) and an autonomy-supportive leadership style (De Clerck et al., 2020). A conceptual model of the CSO structure is provided in Figure 4.1.

Nearly every member-serving program and service area of the CSO is all-volunteer run and managed, and a notable proportion of members serve in program leadership roles. As discussed previously, one unique organizing feature of the CSO is the dual role of member-volunteer – those who contribute both financially (in the form of membership dues) and temporally (in the form of volunteer time). Another unique feature of the CSO structure is the large number of member-volunteers who function as leaders, contributing not only money and volunteer time but also leadership. Most of these
Member-volunteer leaders are interwoven throughout the organization in coordination and collaboration with one another and with nonmember-volunteer leaders, and they are situated at multiple programmatic intersections that rely on effective internal communication processes in order for their program areas to be successful. Member- and nonmember-volunteer leaders are key internal stakeholders within the CSO and they represent the target sample group for this research project. Additionally, the Project Coordinator makes significant contributions to leadership and committee groups and, therefore, is included in the key stakeholder group as the only paid staff (i.e., neither a member or volunteer).

As shown in Table 3.1, eight categories of volunteers serve the CSO in various capacities. Seven of which, excluding “General” volunteers, perform leadership functions and are part of the key internal stakeholder target group for this inquiry.

<table>
<thead>
<tr>
<th>Volunteer Category</th>
<th>Organization Level</th>
<th>Focal Area(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership-Board</td>
<td>Corporation</td>
<td>Governance</td>
</tr>
<tr>
<td>Committee Chair</td>
<td>Board</td>
<td>Communications, Development, DEI, Endowment, Executive, Finance, Partnerships</td>
</tr>
<tr>
<td>Committee Member</td>
<td>Board</td>
<td>Communications, Development, DEI, Endowment, Executive, Finance, Partnerships</td>
</tr>
<tr>
<td></td>
<td>Executive</td>
<td>Program Leadership and Neighborhood Group Councils</td>
</tr>
<tr>
<td>Leadership-Programs</td>
<td>Program</td>
<td>Practical Services, Member Support, Healthier Aging, Social and Cultural, Cross-Program Events</td>
</tr>
<tr>
<td>Leadership-Local</td>
<td>Neighborhood</td>
<td>Neighborhood Groups</td>
</tr>
<tr>
<td>Project Lead</td>
<td>Project-Based</td>
<td>Social media (e.g., Facebook); weekly events communication</td>
</tr>
<tr>
<td>General</td>
<td>Task-Based</td>
<td>Direct member services</td>
</tr>
</tbody>
</table>

*Source: Author’s creation (2021).*

**Interview Participant Recruitment**

Member and nonmember volunteer leaders within the CSO were purposively recruited to participate in one-on-one interviews that ranged in duration between approximately 40 to 60 minutes. Potential interview participants (key internal stakeholders) were identified in cooperation with operations
staff at the CSO as holding leadership positions managing program teams, serving on Board-level committees, and/or serving on council groups that coordinate with organizational leadership to represent and serve general members. An email soliciting interview participation was sent to a total of 36 internal stakeholders using a common email method that masked the identities of those on the distribution list. The invitation email provided potential interview participants with general information about the purpose of the research, the approximate expected interview length, and the interview objective designed to capture experiences and perspectives regarding internal communications based on their role(s) on the teams and groups they support. A commitment to organization and individual confidentiality was provided to all stakeholders. The interview invitation email included a link to a calendar scheduling website with instructions for potential stakeholder participants to self-select an interview date and time during the interview period of July 1, 2021, to July 15, 2021. A total of 13 stakeholders registered for an interview and, ultimately, a total of 10 stakeholders participated in interviews.

**Interview Procedure**

Ten one-on-one stakeholder interviews were conducted virtually using the Zoom meeting platform. At the start of each interview, stakeholders were asked for their consent to record the interview and all interview participants agreed. Video and audio recordings, as well as an auto-generated transcript, were captured by the Zoom platform for each interview and used for analysis.

Each semi-structured interview included a pre-determined set of categorical questions intended to capture descriptive and contextual information relating to membership status (classification), group category and focal area(s) served, tenure with the CSO, and the average number of monthly hours contributed (see Table 4.1, *Interview Participant Characteristics* in Section 4, Data Analysis). Participant gender was assumed by observation and gleaned from conversation, and while age was not asked, all but one stakeholder is presumed to be age 55 or older by the nature of the elder-serving organization.

Following the categorical questions and depending on the current leadership role(s) of the stakeholder, five to ten pre-determined questions with subsequent follow-up prompts were asked to:

- capture the process and effectiveness of vertical and lateral internal communication relevant to role(s), team(s), and/or program(s) served;
- identify internal communication gaps and/or inefficiencies that may be negatively impacting the ability of stakeholders to serve members;
• determine perceptions of transparency with regard to the CSO Board and executive leadership; and
• ascertain the degree to which stakeholders understand the organization’s current strategic goals and their role in helping to achieve those goals.

The semi-structured interviews included open-ended questions based on leadership role(s) and follow-up prompts were asked to glean further details and insights regarding awareness of strategic objectives, perceptions about the effectiveness of internal communications throughout the organization, and to gather informed opinions about perceived information gaps that may be hampering individual and team efficacy.

A list of the pre-determined set of categorical questions and possible follow-up prompts is provided in Table A.1 (see Appendix A). Not all questions in a given category were asked of each interview participant, and interview participants were allowed the freedom to expand on question topics, which naturally led to gathering information not planned for in the pre-determined question set.
Section 4: Data Analysis

Case Study Organization: A California Village

The CSO established in 2010 is an MSNPO organized under the prototypical village model by highly involved members using a grassroots approach (see Tables 2.1, 2.2, and 2.3). The mission of the CSO is to empower older people to age healthier and maintain their independence by offering programs, services, resources and policy advocacy. The CSO is among the first villages to form in the United States, is located in the state of California, and was instrumental in forming the Village Movement California statewide village coalition. With the support of a few paid staff, the nearly all-volunteer run CSO is largely managed by member stakeholders, approximately 30 percent of whom serve in leadership roles at the governance, operations, program, and neighborhood level. A conceptual model of the CSO structure is provided in Figure 4.1.

Figure 4.1  Conceptual Model of the Case Study Organizational Structure

Source: Author’s creation (2021).
Member- and nonmember-volunteer leaders are key internal stakeholders within the CSO and represent the sample group for this research project. Key internal stakeholders make ongoing contributions throughout the organization in governance, operational leadership, neighborhood groups, and programs and serve in middle leadership functions where internal communication flows between those in governance and the general membership. Consistent with the findings in the literature, approximately 30 percent of members in the CSO are considered highly involved as member-volunteers and member-volunteer leaders (Scharlach et al., 2011), and roughly six to ten volunteers operate as nonmember-volunteers and nonmember-volunteer leaders primarily in program focal areas. The symbolic model shown in Figure 4.1 does not reflect the fact that several member-volunteer leaders, as well as nonmember-volunteer leaders, operate in multiple roles while contributing in different areas of the organization, namely in the areas of Board committees and neighborhood group and program leadership councils.

Key stakeholder participant characteristics are detailed in Table 4.1, which include role; volunteer category, organization level, and focal areas (see also Table 3.1, Categories of Volunteers That Contribute to the CSO); as well as the number of years each has been with the CSO and their average number of volunteer hours in a typical month. Interview participants have been assigned an identification label to protect individual anonymity.

As reported in Table 4.1, all participants but one member-volunteer serve in more than one role and contribute an average of 27.75 hours of volunteer time monthly. As volunteer time contributions can vary depending on new and/or shifting projects and initiatives, participants were asked to estimate their total number of volunteer hours in a typical month during a typical year. Participants are predominantly female and contribute volunteer time at different levels of the organization and toward a wide range of focal areas.

**Stakeholder Analysis**

An analysis was conducted to identify and examine the relationship of key stakeholders to their level of influence and commitment in the CSO in order to guide the internal communications analysis. Key stakeholders from each of the seven volunteer categories that perform leadership functions were analyzed, including “General” volunteers for context. Figure 4.2 illustrates the stakeholder analysis framework, and Figure 4.3 provides the stakeholder analysis results.
Table 4.1  Stakeholder Interview Participant Characteristics

<table>
<thead>
<tr>
<th>ID</th>
<th>Gender</th>
<th>Role</th>
<th>Volunteer Category</th>
<th>Organization Level</th>
<th>Focal Area(s) Where Contribute Time</th>
<th>CSO Tenure (Years)</th>
<th>Monthly Volunteer Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>P01</td>
<td>F</td>
<td>MV</td>
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<td>Corporation</td>
<td>Governance</td>
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<td>20</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Committee Member</td>
<td>Board</td>
<td>Development, Endowment, Executive, Governance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P02</td>
<td>F</td>
<td>NMV</td>
<td>Committee Member</td>
<td>Executive</td>
<td>Program Leadership Council</td>
<td>4</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership-Program</td>
<td>Program</td>
<td>Events Team Lead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P03</td>
<td>F</td>
<td>MV</td>
<td>Committee Member</td>
<td>Executive</td>
<td>Program Leadership Council</td>
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<td>7</td>
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<tr>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>P04</td>
<td>F</td>
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<td>Board</td>
<td>Communications</td>
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<td>n/a</td>
</tr>
<tr>
<td></td>
<td></td>
<td>S</td>
<td></td>
<td>Executive</td>
<td>Program Leadership Council</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P05</td>
<td>F</td>
<td>MV</td>
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<td>Corporation</td>
<td>Governance</td>
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<td>25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Committee Chair</td>
<td>Board</td>
<td>Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P06</td>
<td>F</td>
<td>MV</td>
<td>Leadership-Board</td>
<td>Corporation</td>
<td>Governance</td>
<td>11</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Committee Chair</td>
<td>Board</td>
<td>Development, Endowment, Executive, Finance Governance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P07</td>
<td>M</td>
<td>MV</td>
<td>Committee Member</td>
<td>Board</td>
<td>Finance</td>
<td>5</td>
<td>40</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership-Local</td>
<td>Executive</td>
<td>Neighborhood Groups Council</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Neighborhood</td>
<td>Neighborhood Group Lead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P08</td>
<td>F</td>
<td>MV</td>
<td>Leadership-Board</td>
<td>Corporation</td>
<td>Governance</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Committee Chair</td>
<td>Board</td>
<td>DEI</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership-Programs</td>
<td>Program</td>
<td>Elder Advocacy Group, Arts/ Culture Lead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P09</td>
<td>F</td>
<td>MV</td>
<td>Committee Member</td>
<td>Executive</td>
<td>Neighborhood Groups Council</td>
<td>10</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership-Local</td>
<td>Neighborhood</td>
<td>Neighborhood Group Lead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P10</td>
<td>F</td>
<td>MV</td>
<td>Committee Member</td>
<td>Executive</td>
<td>Neighborhood Groups Council</td>
<td>7</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Leadership-Local</td>
<td>Neighborhood</td>
<td>Neighborhood Group Lead</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Author’s creation (2021).
Gender: F = Female (assumed), M = Male (assumed); Role: MV = Member-Volunteer; NMV = Nonmember-Volunteer; S = Staff
CSO Tenure: Figures have been rounded to the nearest whole number.
Monthly Volunteer Hours: Figures represent self-reported estimates; participants were asked to provide an estimate of volunteer hours for a month in a typical year, accounting for potential variance due to COVID-19 disruptions during 2020. The calculated average of monthly volunteer hours per stakeholder is 27.75.
Figure 4.2  Stakeholder Analysis Framework for Internal Communication

<table>
<thead>
<tr>
<th>Level of Commitment</th>
<th>Level of Influence</th>
<th>Involv/Consult</th>
<th>Collaborate/Empower</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High</td>
<td>High Influence</td>
<td>High Influence</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Low Commitment</td>
<td>High Commitment</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td>Low Influence</td>
<td>Low Influence</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Low Commitment</td>
<td>High Commitment</td>
</tr>
</tbody>
</table>

Source: Author’s creation (2021), adapted from United Nations Statistics Division (2020).

Figure 4.3  Internal Communication Stakeholder Analysis (CSO)

<table>
<thead>
<tr>
<th>Level of Commitment</th>
<th>Level of Influence</th>
<th>Involv/Consult</th>
<th>Collaborate/Empower</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High</td>
<td>General Members</td>
<td>♦ Leadership-Board</td>
</tr>
<tr>
<td></td>
<td></td>
<td>♦ Committee Chairs</td>
<td>♦ Committee Members</td>
</tr>
<tr>
<td></td>
<td></td>
<td>♦♦ Leadership-Programs</td>
<td>♦ Leadership-Local</td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td>♦ General Members</td>
<td>♦♦ Project Leads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>♦ General Volunteers</td>
<td></td>
</tr>
</tbody>
</table>

Source: Author’s creation (2021), adapted for the CSO from United Nations Statistics Division (2020).

♦ Members; ♦ Includes Non-Members; General Members are included in both the High Influence/Low Commitment and Low Influence/ Low Commitment quadrants to reflect a segment of General Members that asserts more influence through intentional communication regarding programmatic and organizational feedback.
Primary Stakeholders: Collaborate and Empower

*High Influence, High Commitment* stakeholders include founding members and those who have a longer tenure with the organization that contribute more time to the organization on average and in more than one role, have some decision-making authority or significant input into decisions, and lead other member and non-member volunteers.

*Moderately-High Influence, High Commitment* stakeholders include member and non-member volunteers who serve as representatives of their respective areas of influence on coordinating leadership and neighborhood council groups structurally intended as knowledge sharing and coordinating and/or advisory entities.

In order to keep the dedicated individuals in these groups highly informed, empowered, and deeply engaged in the organization, effective internal communications practices among primary stakeholder groups should: be regular and consistent; clarify the role, objective, and internal communication responsibility for each group; encourage collaboration and knowledge sharing; empower individuals with authority to make autonomous decisions; specify how the group’s role is integrated with other key stakeholders; and make clear how the group and individuals therein support the organizational strategic goals.
Secondary Stakeholders: Consult/Involve

*Moderately-Low Influence, High Commitment* stakeholders include members and non-member volunteers who lead single programs (e.g., Outreach), coordinating teams (e.g., General Events) that provide direct programs and services to General Members.

*High Influence, Moderately-High Commitment* General Member stakeholders include those who assert more influence through active, intentional, and proactive communication regarding programmatic and organizational feedback.

In order to keep the committed individuals in these groups highly involved and engaged in the organization, effective internal communications practices among secondary stakeholder groups should:

- Be regular and consistent; clarify the role, objective, and internal communication responsibility for each group;
- Encourage collaboration and knowledge sharing; solicit and incorporate their input; clarify how activities impact other key stakeholders; and make clear how their project activities support the organizational strategic goals.

Tertiary Stakeholders: Inform

*Moderate Influence, Low Commitment* General Member stakeholders include those who do not volunteer and whose influence is derived from their investment in the organization in the form of membership dues.

*Low Influence, Low Commitment* General Volunteer stakeholders include nonmember volunteers whose contributions are typically confined to episodic, task-based direct services to members.

In order to keep the individuals in these groups informed, effective internal communications practices among tertiary stakeholder groups should:

- Be regular, timely, and consistent; include information that communicates the value and benefits of their membership or volunteer efforts with the organization; and include updates related to the organization’s strategic goals.
Qualitative Analysis

The objective of this qualitative analysis is to identify common themes that emerged from the one-on-one interviews conducted with ten key stakeholders who operate in leadership roles in support of the CSO mission. Interviews focused on subject matter that is related to internal communications in four primary areas of inquiry:

1. the process and effectiveness of vertical and lateral processes relevant to stakeholder role(s), team(s), and/or program(s) served;
2. information gaps and/or process inefficiencies that may be negatively impacting the ability of stakeholders to serve members;
3. perceptions of transparency with regard to the CSO Board and executive leadership; and
4. the degree to which stakeholders understand the organization’s current strategic goals and their role in helping to achieve those goals.

A content analysis approach was used to analyze the transcripts from each interview using deductive reasoning to identify themes related to the four pre-determined primary areas explored and subthemes therein. Inductive reasoning was used to categorize themes that emerged from the data that fell outside of, or that contributed additional perspectives to, the four pre-determined primary areas. The analysis that follows includes key findings that were considered most relevant to the research questions guiding this study. A summary of primary themes that emerged from the data is provided in Table 4.2.

**RQ1: What formal internal communications processes exist to promote intergroup knowledge sharing?**

**General Knowledge Sharing Motivated by Common Values, Interest**

An affinity for organic, informal communication and relationship building based on common values and interests emerged from the highest levels of leadership.

“I think the cross fertilization among groups is better than average, and there’s energy behind it. For instance the [elder advocacy interest group]. My experience is that I’m talking to members of that group and participating when I can and in what they’re doing and finding avenues, and so I’ve been in touch, for example, as we set up our endowment. I’ve had a lot of extensive conversations about impact investing and what it means to undertake investment of endowment proceeds in a way that reflects village values.” (P01)

“The truth is, we have several Board members who are still involved in a whole lot of programs […] the arts and culture series was started by Board members and is still run by some Board members.” (P06)
“In some ways [we’re] better than the usual groups out there at relationship building and that becomes critical […] so what that means is that the people who see common ground between the various committees and so forth, we all find each other.” (P01)

“There’s something called village stories, or something like that, where teams are invited to come to the Board meeting and tell stories – I remember the [membership recruitment] team and the connections team coming. I think that’s to keep the Board in contact with some of those things from operations that are going on, which is a good thing. I think that’s helpful and people really seem to like that a lot.” (P05)

**Corporation Level Leadership and Transparency (From Board)**

A relatively recent policy for opening one Board meeting each calendar quarter to all members and volunteers is viewed as largely successful from all stakeholder levels. Communications processes and related measures instituted in the past four years demonstrate Board responsiveness to requests for greater transparency.

[Board member perspective] “I was a big proponent of opening the Board meetings, which used to be closed. We now have a Board meeting each quarter that is open [to members and volunteers], and I think the people who have attended, which hasn’t been a huge group, they like it and appreciate it, and it certainly has improved transparency.” (P05)

[Board member perspective] “There’s a Board column now every month written by a Board member. The goal of it is supposed to be to introduce that Board member to the membership and the community, but we don’t dictate what they write about.” (P05)

[Board member perspective] “We are now putting a summary of the minutes of all our board meetings on our website that members can access.” (P06)

[Middle leadership perspective] “From my own perspective, especially since the communication initiative, which was in 2017 I think, communication has been very open with the staff and therefore with the Board, and I’m happy with the level of communication and inclusion that we have.” (P10)

Tentativeness about the responsibility for communicating certain types of information and the appropriate level of transparency was expressed by Board members related to a lack of clarity about what information should be shared by whom and when organization-wide.

“I do think that there is some hesitancy about how much should be shared with members about certain things like [staff] departures and that kind of thing. [The Board President] makes those decisions with input from other people and that’s fine with me.” (P05)
“Some things are confidential, certain personnel issues and other things. The important thing is that the Board transitioned from being a founding Board to being more institutional Board, and it was a really important transition, because in a founding Board you tend to have a lot of people who do everything -- they're involved in programs like things they started. A more institutional Board is really only about policy and finances and major initiatives like the DEI initiative [...] It was really important that Board members stay out of day-to-day operations. The only connection we actually have directly in personnel issues is that we have the authority to hire and fire and evaluate the executive director.” (P06)

Board members express being mindful not to cross a delineation of responsibility between the Board and Executive Director after an organizational structure change a handful of years ago.

“I think [the Executive Director] does a pretty good job of getting information to the Board. We get good information in Board meetings, and on the other hand, I don’t think they inundate us with information [...] Before my time, I think there were some issues about the Board not micromanaging and stepping on the director’s toes, and there’s been an effort to make sure that the Board doesn’t get into things that are supposed to be staff responsibility, so we don’t get that level of information, and I think that’s okay.” (P05)

The extent and effectiveness of internal communication from Board leadership was viewed more favorably by member-leaders when they have a trusted representative in a liaison role working directly with corporation (Board) and executive level decision-makers.

“We have three members on the Board, so we actually know what’s going on, and if somebody in [our neighborhood group] wants to know what the Board is doing, one of us gets a call.” (P01)

“I'm pretty happy with [communication from the Board], and I'm also confident that our numbers wonk – who is now on the Financial Committee and an unofficial neighborhood group liaison with [the Executive Director] is on top of that stuff.” (P10)

Some Board members expressed frustration that attempts at transparency are less than successful; internal audience segments, communication methods, and form of access may need to be assessed to improve the effectiveness of internal communication.

“We went out to meet with the neighborhood groups, and we would try to explain how we make decisions and how the Board operates, and to answer any questions that people might have had about anything [...] We have reminded people with the open board meetings with the fact that the minutes are on the website, etc., that this is available to them, so if they complain that they don't have this information and don't avail themselves of it, you know you have to raise your hands, and I think people understand that.” (P08)
Program Level Leadership Information Sharing

Past attempts to address knowledge sharing across and between program and geographically defined neighborhood group areas include structural strategies that formed council groups of representatives with mixed success. Board members view these groups as effective, while others in middle leadership positions believe there is room for refined definitions, structural adjustments, and process improvement; Some confusion exists as to the purpose of each group and who is responsible for communicating certain types of information.

[Board member perspective] “We formed the group in the early days, what we called a kitchen cabinet, which was a weekly meeting with [the Executive Director] where he could brainstorm about everything that was going on. But we began to realize that it was not very democratic – that who got to be on the kitchen cabinet started to have exclusion. It was not a good model, and so as part of our transitioning to a more institutional Board, we formed the Program Leadership Council so [the Executive Director] could really have a body of people who talked about all the internal issues.” (P06)

[Board member perspective] “I think the purpose of the Program Leadership Council is mostly coordination and information sharing. I think that’s where important pieces of the village come together, to share information and get updates.” (P05)

[Board member perspective] “The Program Leadership Council strikes me as a very powerful group that the Board listens to, and they do have a representative on the Board.” (P01)

[Board member perspective] “I think [the Executive Director] has done quite a good job of ensuring that we hear what we need to know – the Board does not need to know information about individual members. The Board’s work is policy infrastructure stuff […], but it is really important to know a little bit about what’s going on with people’s lives, although their confidentiality is to be protected. The groups that contact members every month to call and check in and so forth […], I do think it’s very wise to make sure that the Board feels like ‘wow, that’s in good hands’. ” (P01)

“[The Program Leadership Council] is very important, but we have a longer way to go. They need to feel like they can, if they want to, start some initiative, that they could come to the Board and propose it and we could figure out how to work together.” (P06)

Hesitancy was expressed about the responsibility for communicating certain types of information and a lack of clarity about what information should be shared by whom and when from the Program Leadership Council to their program area and general members.
Middle leadership perspective] “I report a bit to my team from the [Program Leadership Council], if it’s of interest to them, which mostly it’s not, to be honest. Another thing is that it was never really discussed if we should [relay to] the teams what’s discussed at the [Program Leadership Council] level. It’s not quite clear because there’s some stuff that’s discussed that is kind of confidential [...] and I’m not so sure if I should actually share it.” (P03)

Neighborhood Group Level Leadership Information Sharing

Mixed and conflicting perceptions were expressed regarding responsibility for communications and authority for decision-making related to the Neighborhood Group Council and coordination with the Board and support staff.

Board member perspective] “We have liaisons between the Board and the program leadership and neighborhood group councils that come to the Board meetings, and hopefully there’s a lot of communication outward.” (P06)

Middle leadership perspective] “[The Program/Member Services Liaison] would bring information from the staff and we’d share [information from members] with him, but he was also the guardian of policies and would share information about things we might be impinging on. There are still areas where we’re trying to work out how we can dovetail with the staff and the village in general to provide services to members.” (P07)

Middle leadership perspective] “It ended up falling to us. I think that they expected us to be the ones who shared the information. It was all very unclear. I had the responsibility for giving the information, but I didn’t have the respect of participating in whatever that information meant.” (P09)

Council-level (or middle) leadership that recognizes and has advocated for better information flow from upper leadership is determined to keep the members in their neighborhood groups informed, but find the information often fails to reach a majority.

“The biggest stumbling block for any information flow is the target picking up the phone, reading the email, looking at the website. I’m completely flummoxed. When I send news about this, that or the other thing, I'm thrilled when a handful of people, maybe 20 out of 70, read them.” (P07)
RQ2: How can internal communications be formalized and aligned to collaboratively achieve organizational strategic objectives?

Agreement About the Overall Operating Doctrine and Organizational Structure

Some middle leadership stakeholders who work more closely with the general membership believe operating and strategic functions should be driven from the membership rather than from the leadership down. Remarks expressed indicate that there are no formal efforts to align member-led groups and organizational strategic goals. Comments also reveal a deeper disconnect about the strategic direction of the village overall that has persisted for some time despite some progress.

Speaking about the last major steps taken in 2017 to improve information sharing within the village, middle leadership stakeholders describe challenges that led to changes such as quarterly open Board meetings, redefining staff support roles, more member inclusion in the decision-making process, and greater transparency overall.

“A number of us coordinators were unhappy with the way the village had been run – there’s not functioning communication, functioning transparency, functioning lines of hierarchy, you know, and one of the things we asked was ‘who’s driving the village?’ We felt the membership should drive the village and decisions made should benefit the membership. We felt the Board and some of the staff viewed [themselves as] the driving force of the village and wanted to establish us as a high functioning village locally, statewide and nationally and to expand.” (P07)

“There was something kind of spontaneous that bubbled up around some job descriptions and a reorder that had happened on the staff level that the membership didn’t know about or didn’t support. I’m convinced now that [the Executive Director] and the Board just didn’t have the membership on their radar and that’s interesting to me, because it is a member based and member volunteer driven organization and it just didn’t occur to them that we would want to be that included. For some of those decision-making processes, we didn’t want to make the decisions, but we wanted to be asked, we want to be informed and that’s happened. It’s really very satisfying.” (P10)

Some stakeholder comments illustrate that the member-driven grassroots organizing feature of the village creates a bond among many members and a sense of ownership around a shared vision. As the village has grown in membership terms, challenges associated with blurred program boundaries and different understandings of the vision for the organization emerged.
“The village began on kitchen tables in people’s houses. People got together to help one another. And then, all of a sudden, we became this 400 member organization […] that’s not a village. You have to feel a sense of belonging to something […] They’re proud of the number of zip codes that they serve. But one of the things we were unhappy about is that we felt that we weren’t getting the services that we expected already and we were wondering how they were ever going to serve more people at a greater distance.” (P07)

“This is fairly typical of a nonprofit that has had a lot of volunteer input and things have kind of grown top-heavy. I think we’re at a point now where we need to step back and look at the organizational structure and ask whether it really makes sense. For example on the events team, we plan a certain kind of event, and then there’s this other group called the arts and culture series and they plan a whole different kind of event, and then there’s the [elder advocacy interest group] that sometimes will have events, so there’s a lot of duplication and unclear lines of authority. Part of that is because the person who was the staff member who was kind of overseeing both program development and member support has been gone now for several months. (P03)

Understanding of the Current Strategic Priorities

In addition to attention and communication related to a major DEI initiative, the CSO is currently restructuring to recruit and fill three staff positions, which is more than half of the organization’s paid staff. While hiring has not been explicitly communicated as a “strategic” goal from leadership, several stakeholders expressed this and issues related to staff vacancies as a priority along with strategic goals.

[Board member perspective] “I went to the Neighborhood Group Council and talked about the DEI initiative in the beginning, and then out of that evolved different meetings. Someone else from the Board went to the Program Leadership [Council] and did the same thing […] We asked them to comment on the [DEI planning] document and for suggestions about how to implement the goals, and we’ll be going back to talk about suggestions they had for organizations they were involved with that they thought we could make presentations to.” (P05)

“[Filling vacant staff positions] I assume is a priority of the Board right now, that, the DEI initiative, and increasing membership […] Getting new members is, I think for obvious reasons, a big thing for the Board and upper echelon. More members means more money […] For the teams, that’s not really their thing. They want to put on good events and mostly do it for the actual members, not necessarily to do outreach. It’s nice if it happens, but we mostly do it for our members because that’s what they came for and that’s what they pay for.” (P02)

“We are not paid staff, you know? Meaning, if you have a staff member there, he’s in charge. But for half a year now, it was all on us. We had the responsibility for the events and everything that goes with it, a greater responsibility to get the whole thing going and
come up with other events, which is not always so easy. That’s something that a program
director should do [...] I make sure every time we talk about it to say that this should be
a priority.” (P02)

“We were particularly concerned about the social care, social work [position], because
our membership had doubled and there was no indication that there was an appreciation
that we would need at least a dedicated social worker. And if we’re going to add a half
time anything, shouldn’t it be a social worker?” (P10)

“I really appreciate [input from neighborhood member-leaders] I trust them, I like them,
and I think we’re all very honest with each other. We’re all facing this issue of the kinds
of positions being advertised and another person having just resigned and the executive
director being on leave. I think we’re in some trouble and we’re trying to brainstorm our
way through it [...] we talk a lot about the way we see things, how we see new positions
in the organization and if there’s any restructuring [to be done], what are the things that
we value the most.” (P09)

Strategic Planning: The Process

The CSO has commissioned various assessment reports and coordinated pro bono organizational planning
assistance during the last seven years, including an effort by graduate students from a nonprofit and
public leadership program in Northern California that led to a more institutional Board restructure.
Stakeholders express mixed opinions about these third-party efforts primarily related to the perceived lack
of outcomes as well as outcomes that did not seem in line with their understanding of the strategic
mission of the CSO.

[Board member perspective] “I’ve been through a lot of strategic plans in my life. I’m
not a big fan of the undertaking. It’s a huge amount of work and it’s not worth doing
unless, it seems to me, that there’s some kind of an implementation notion built in on the
front end, which I have not seen.” (P01)

“One of the things that we discussed as a [communications initiative] group is that they’ll
just commission another report, and then there’ll be another report that will be put into
the file and nobody will look at it after we have the results. Because that’s happened.
There’ve been a number of reports and then they just get filed and what happened? It
costs some money, so what’s going on with it? (P09)

The influence of the grassroots organizing approach and the freedom extended to members and member-
leaders to develop strategic priorities is evident among many stakeholders.

“I saw the village as a really wonderful organizing tool for social justice -- an elder
social justice group, which is what I was interested in trying to get started. Because you
know here's this big community and I'm part of it, and why not, and so it has proved to be
the case [...] I think the other piece of it is that [those involved] are simply saying ‘we may be old, but we’re still relevant’. And you know this particular generation of elders come from a background of the peace movement, the civil rights movement, you know, we have a great depth of experience in organizing and activism.” (P08)

Program development and specific strategic planning reveal that efforts are driven by individual values that are in alignment with those of the organization.

“A lot of our values are about legacy – it’s about the world we’re preparing to leave to our children and our grandchildren and their children, and so climate means a lot to us [...] We’re exploring this whole notion of a kind of ethical will or ethical bequests, or how to take a look at the whole big picture of legacy that involves money and time, what’s left behind and what we can do now.” (P01)

The Role of Communications in Strategic Planning

Stakeholders express a recognition that roles and responsibilities, along with gaps in communication, are partially a result of considerable organizational growth. The establishment of a Board-level communications committee that did not occur until year 10 of the organization’s history is perplexing to some.

“I think what happened is just a function of growth when something starts on a kitchen table. When I joined the village, there were less than 200 members and now we’re approaching 400 members, so it’s a question of scale – it used to be the communication method was to pick up the phone for whoever or whatever, but things need to be formalized or codified in a different way.” (P10)

[Board member perspective] “It’s interesting to think about the fact that the organization has never really had a communications committee until now. I mean, people have done communications and some marketing efforts, but not a formal committee [...] We came up with goals that we talked to the Board about, and during the pandemic is when the Board approved it as a Board committee.” (P05)

Volunteer-managed content for the company Facebook page or the weekly communication newsletter of community events was only recently folded into the newly formed Board-level Communications Committee and confusion related to uncoordinated content lingers.

“[Facebook and the events newsletter] were all uncoordinated communication. I think the redesign of the website and the fact that these things are part of the discussion about what’s going to be communicated is a good thing – we will move closer to coordinating communications, hopefully.” (P05)
Additional Thematic Findings: Volunteer Motivation

Given the nearly all-volunteer run nature of the CSO, themes related to volunteer motivation are included here to capture insights that fall outside the scope of the two primary research questions.

Comments expressed by more than one stakeholder revealed a self-serving motivation for volunteering with the village as a meaningful substitute for caring for a distant loved one.

“One of the reasons why I volunteer is that I have a 93-year-old father who lives in Germany. He still lives by himself, and I’m really sad that I cannot really help him much. So one of the reasons for me to volunteer and, in particular volunteer with older adults, was that at least maybe I can do some good for someone here [...] I really like to work with older adults.” (P02)

“I joined as a volunteer because my mother lived in North Eastern Florida, and I’d been talking to her about how I wish there were certain kinds of services. And when I came back [from visiting her], I went to a living room chat, a meeting about people joining [the CSO], at a friend’s home and I thought, well, I can volunteer here and do for other people what I cannot do for my mother.” (P09)

Stakeholder comments about volunteer motivation align with touted benefits of the village model. An opportunity for a meaningful extension of professional work balanced with the desire/need for a flexible schedule and social/intellectual stimulation and friendships are among the reasons people volunteer and join as members.

“My family makes a huge commitment to volunteerism and I knew I wanted to volunteer to do something, and after I retired, [CSO] was perfect [...] I like the programmatic side of it – it’s really fun, it’s really challenging. I’ve had some jobs that [required] stronger leadership positions and this is a continuation of that without the reporting hassle [...] and I needed a really flexible schedule.” (P10)

“A number of members are friends of mine, they’re essentially all the member leaders and lots of people in my neighborhood group. I go visit somebody in their backyard and we spend half the time talking about the village. I really enjoy this group of engaged people.” (P10)

The level of commitment to the CSO by some member-leaders can, however, become imbalanced by over-commitment driven by the perceived needs of the organization.

“I had no idea I was getting myself into so much work [...] I thought I would show up for Board meetings and maybe help with PR stuff, which I’ve done pretty much with every organization I’ve been involved with, and I’d maybe read some press releases [...] but,
what drives me is that I believe in the organization, and to be honest, if somebody asks me to work on something, I don’t feel comfortable saying no.” (P05)

[Regarding staff vacancies] We cannot endlessly continue like this […] I don’t want to burn out. We like the organization too much you know, and I want to be there for the long haul, but you don’t want to feel taken advantage of – saying ‘Okay, we have a good team there and they [carry on] anyway, so this is not really a priority’. ” (P02)

Table 4.2 Summary of Themes Derived from Stakeholder Interviews

<table>
<thead>
<tr>
<th>Theme Category</th>
<th>Summary Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RQ1: What formal internal communications processes exist to promote intergroup knowledge sharing?</strong></td>
<td></td>
</tr>
<tr>
<td>General Knowledge Sharing Motivated by Common Values, Interest</td>
<td>• Affinity for organic, informal communication and relationship building among highest levels of leadership</td>
</tr>
</tbody>
</table>
| Corporation Level Leadership and Transparency (From Board) | • Board responsiveness, greater transparency viewed as largely successful from all stakeholder levels  
• Tentativeness, lack of clarity about communications policy for certain types of information  
• Liaison proximity to leadership linked with greater satisfaction with Board communication  
• Frustration at failed attempts at transparency |
| Program Level Leadership Information Sharing | • Board members view middle leadership as effective  
• Middle leadership seeks refined role definitions for roles/programs, clarification of authority and communication policies |
| Neighborhood Group Level Leadership Information Sharing | • Conflicting understandings were expressed regarding responsibility for communications and authority for decision-making  
• Frustration at failed attempts at transparency |
**RQ2: How can internal communications be formalized and aligned to collaboratively achieve organizational strategic objectives?**

| Agreement About the Overall Operating Doctrine and Organizational Structure | • Some stakeholders believe operating and strategic functions should be member vs. leadership driven  
| | • No formal efforts to align member-leader groups and organizational strategic goals exist  
| | • Challenges associated with blurred program boundaries and different understandings of the vision for growth  
| Understanding of the Current Strategic Priorities | • All stakeholders aware of DEI initiative; most cite filling staff vacancies as a priority; many reference membership growth  
| Strategic Planning: The Process | • Mixed opinions about third-party assessment efforts (perceived lack of outcomes, understanding of fit with strategic mission)  
| | • Evident influence of the grassroots organizing approach in the development of strategic priorities driven by shared values  
| The Role of Communications in Strategic Planning | • Recognition that role, responsibilities, communication gaps are partially a result of considerable organizational growth  
| | • Recent establishment of a Board-level communications committee is perplexing (timing) but viewed as positive  

**Additional Themes**

| Volunteer Motivation | • Volunteering with the village as a proxy for caring for a distant loved one  
| | • Stakeholder volunteer motivation aligns with touted benefits of the village model as a meaningful extension of professional work and connection  
| | • Highly embedded member- and nonmember-leaders are at risk of burnout  

Source: Author’s creation (2021).
Section 5: Implications and Recommendations

This research has led to a better understanding of the internal communications practices of a membership-based nonprofit organization based on the village model concept that provides both practical and enrichment programs and services to older people by older people. A literature review of several key components of this research undertaking summarized the relevant distinguishing aspects of resource-dependent community-serving nonprofit organizations, nonprofit membership organizing structures, the origins and distinctive features of the village model and its challenges, and a brief review of scant internal communications literature. While not fully comprehensive in scope, this research provides a starting point for a number of future research efforts focused on one or more of the integrated concepts, particularly for internal communications within MSNPOs. Perhaps one of the most surprising early findings from this study was the lack of internal communications research even within the private sector and business management literature. When it comes to nonprofit organization management, the internal communications research is notably lacking. As a result, the analysis, proposed models and tools, and recommendations herein rely heavily on internal communications research and best practices developed for the private sector as the employee-centered approach was the most applicable for exploring the strategic potential of the member-driven nonprofit village model.

Prevailing Themes From Stakeholder Interviews

RQ1, Knowledge Sharing

An affinity for organic, informal communication and relationship building exists among the highest levels of leadership. Board responsiveness and efforts to provide greater transparency are viewed as largely successful from all stakeholder levels, however, some tentativeness exists in bi-directional information sharing due to a lack of clear policies. Frustrations regarding a lack of information engagement were expressed, and given the older population the organization serves, there appears to be a need to better assess methods of ability and access to information.

RQ2, Strategic Alignment of Internal Communication

No formal strategic plan exists, nor are efforts underway to align member-leader groups and the organization’s goals. Strategic planning hesitancy expressed as being a result of ineffective or unimplemented recommendations from past planning efforts may explain the lack of current strategic, marketing, or communications plans. All stakeholders were aware of a current DEI initiative; most cite
filling critical staff vacancies as a top priority. Challenges associated with blurred program boundaries and different understandings of the vision for growth were conveyed.

**Strategic Internal Communications Tools**

The global nonprofit advisory organization Bridgespan cites five primary scenarios under which strategic planning can be especially impactful (Nedelea, 2019):

1. Your last strategic plan is ending and you need to plan for the future;
2. Change has occurred in your environment (external forces);
3. Change has occurred in your organization (internal forces, such as new leadership, accelerated growth);
4. There is confusion about the direction of the organization; and
5. Stakeholders feel that the full potential of the organization is not being achieved.

This research has revealed indications that the case study organization at the center of this inquiry is concurrently experiencing all five of these scenarios in some form. While the research questions on which this study sought to explore the potential of internal communications refinement for strategic purposes, more fundamental communications challenges were discovered and the analysis below and recommendations that follow reflect this development by offering more fundamental tools to address the pressing challenges.

**Stakeholder Internal Communications Matrix**

Based on research by Welch and Jackson (2007) cited earlier, Table 5.1 offers a proposed communications matrix that maps the case study organization participant stakeholder groups according to functional leadership areas; communicator source; and communication direction, audience, and primary content. Functional areas have been guided by stakeholder theory and defined according to their level of influence and commitment, as reported in the stakeholder analysis (Figure 4.3). Primary stakeholder groups serve as the principal communicators, as follows:

<table>
<thead>
<tr>
<th><strong>High Influence, High Commitment</strong></th>
<th><strong>Communicator(s)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Internal corporate communication</td>
<td>Leadership-Board</td>
</tr>
<tr>
<td>• Internal executive communication</td>
<td>Executive Director</td>
</tr>
<tr>
<td>• Internal committee communication</td>
<td>Committee Chairs</td>
</tr>
<tr>
<td>• Internal liaison leadership communication</td>
<td>Leadership (Programs, Neighborhood)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Moderately-High Influence, High Commitment</strong></th>
<th><strong>Communicator(s)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Internal project/team communication</td>
<td>Project Leads</td>
</tr>
<tr>
<td>Dimension</td>
<td>Communicator(s)</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Internal corporate communication</td>
<td>Leadership-Board</td>
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<tr>
<td>Internal executive communication</td>
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<tr>
<td>Internal committee communication</td>
<td>Committee Chairs</td>
</tr>
<tr>
<td>Internal liaison leadership communication</td>
<td>Leadership-Programs</td>
</tr>
<tr>
<td></td>
<td>Leadership-Neighborhood</td>
</tr>
<tr>
<td>Internal project/team communication</td>
<td>Project Lead</td>
</tr>
</tbody>
</table>

Source: Author’s creation (2021), adapted from Welch & Jackson (2007), Table I, p. 185.

Communicator(s) = Stakeholder Volunteer Category

¹ Two-way bi-directional includes vertical and lateral communication

² Internal corporate communication to all staff, members, and volunteers filtered for confidentiality as appropriate based on written policy
Conceptual Model of Directional Internal Communications Between Stakeholder Groups

A conceptual model that illustrates directional internal communications flow between stakeholder groups as defined in the internal communications matrix (Table 5.1) is shown in Figure 5.1. The conceptual model illustrates the bi-directional, intergroup, and multi-channel message flow between groups and teams, their coordinating leadership councils, executive and corporate governance leadership, and the general membership and volunteer labor force.

Figure 5.1  Conceptual Model of Directional Internal Communications Between Stakeholder Groups

Source: Author’s creation (2021).
Internal Strategic Communications Framework

As referenced previously, authors Sue Dewhurst and Liam FitzPatrick are communications professionals specializing in internal communications, change management, and public relations. While written for the private sector, their book, Successful Employee Communications, offers tools and best practices that are directly transferable to the nonprofit sector and accessible to organizations like the case study organization on which this analysis is based (Dewhurst & FitzPatrick, 2019). The “Do-Feel-Know” approach to developing effective internal strategic communication is offered as a strategic messaging framework that is simple in design and intended to work in support of an in alignment with an organization’s detailed SMART objectives. The Dewhurst and FitzPatrick message template framework has been adapted and proposed for the case study organization and is detailed in Table 5.2.
Table 5.2  Internal Strategic Communications Framework

<table>
<thead>
<tr>
<th><strong>Overall Organizational Goals</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Goal</strong></td>
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<tr>
<td><strong>Values to Convey</strong></td>
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<tr>
<td><strong>Key Strategic Actions</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Internal Strategic Communications Framework</strong></th>
</tr>
</thead>
</table>
| **Internal Communications Objectives**         | – Make them SMART  
|                                               | – Develop one primary objective and at least one secondary objective |
| **Internal Stakeholder Audience(s)**           | Identify stakeholder groups\(^1\) that will be the target(s) of internal communications messages related to the specified objective |
| **Internal Stakeholder Messaging**              | **Do** Answer: *What specific action(s) do we need each stakeholder audience to take?*  
|                                               | **Feel** Answer: *What do we want them to feel? What feeling will encourage them to take (the right) action?*  
|                                               | **Know** Answer: *What do we need them to know? What data/facts explain the reasoning behind the message?* |

| **Simple Memorable Message** | Develop a short, meaningful phrase that elicits an emotion or catches attention and conveys the value underlying your strategic objectives |
| **Supporting Messages**      | Answer: *Why should each stakeholder group care? What is the rationale? What happens next and how will it be communicated? Where can more information be found and who is the main contact?* |
| **Messaging Flow** (Bi-Directional, Intergroup, Multi-Channel) | Consult the Internal Communications Matrix and establish a messaging flow plan that involves the right communicators for the right stakeholder audiences |
| **Reinforcing Methods & Channels** | Based on the outcome of an internal communications audit, identify the most effective communication methods and channels for each stakeholder group. Reinforce messaging with additional communication as necessary according to stakeholder group needs |


\(^1\) Precursor planning steps that precede this step could include a comprehensive internal communications audit and a detailed stakeholder analysis that identifies specific groups and subgroups.
Recommendations

As mentioned above, findings from this research suggest that village organizations could likely benefit from best practices in the private sector with regard to internal communications and having a more clear understanding of their internal stakeholders, their information needs, and their potential impact on the sustainability of the organization. If member-serving, highly embedded stakeholders who are the most committed to the organization are confused, under-informed, and under-utilized, a village organization is not only missing an opportunity to strategically direct that passion, but it risks stakeholder disengagement and potentially its long-term future.

The recommendations below offer a basic pathway to defining and re-engaging internal stakeholders. When an organization experiences tremendous growth and a great deal of success, a natural phenomenon can occur whereby the organizational focus slowly and heavily skews toward external priorities to secure people and partnerships, funding diversification, or myriad other resources. An internal focus is equally if not more important during these times of growth. For member-serving and member-led village organizations, how well internal stakeholders’ needs and motivations are understood and considered can impact whether or not a village ultimately survives. Internal stakeholders are the engine and they are committed, but they need to be heard, engaged, and directed.

While there are countless consultancies that can be contracted to guide organizations through some of the suggestions below, each of the recommendations offered can be implemented to some degree by relying primarily on existing staff and volunteer resources and by using publicly available assessment and planning tools.

1. **Understand the stakeholders:** Conduct a more in-depth stakeholder analysis to identify and better understand the characteristics and motivations among sub-segments of the organization (see Figure 4.3). Every single stakeholder can have an impact on how effectively the organization delivers on its mission, as well as its internal and external reputation.

2. **Identify information needs:** Conduct an internal communications audit using employee, member, and volunteer surveys, focus groups, as well as leadership and community partner interviews to gain a clear picture of their communications habits and needs (see Figure 2.3). The outputs from these analyses will better guide communications content to each stakeholder audience to achieve the action, emotion, and understanding the organization wishes to elicit.
3. **Set the direction:** Develop a strategic plan with internal and external marketing components and ensure stakeholders understand these terms and plan components. Effective marketing and communications cannot occur without a solid strategic plan that has every stakeholder on board.

4. **Plan and execute:** Develop a strategic communications plan with internal and external components that are aligned to support the organizational strategic plan (see Table 5.2). Involve appropriate key stakeholders in plan development and ensure every stakeholder is clear about their role in the communications process and expected actions (see Figure 2.4).

5. **Review, evaluate, and communicate value:** Conduct stakeholder surveys on timely intervals; develop standardized methods for monitoring and evaluating progress on a standardized timeline. Incorporate findings into refined strategic planning processes for the next planning period.
Section 6: Conclusion

The form of the village, the feel of the village, to me, is so much like church just without the theology. It certainly has the great food, it has the energy, and it has the engagement of elders. It infuses the people participating and infuses a lot of meaning for us, and this is an essential piece of aging happily, gracefully.

The journey to this capstone subject started at the end of life, stemming from my personal interest in the study of death and dying from a sociological perspective. Coincident with an early interest in these areas, I was a caretaker of my grandfather who lived with and died from complications associated with Alzheimer’s disease, and there were numerous strains on my family while trying to make the end of his life the best it could be. I wanted to better understand some of the causes that culminate in a poor quality of life at the end, and this quickly moved upstream to a focus on social determinants of health and healthier aging strategies. I was introduced to the unique village model during a seminar at U.C. Berkeley a few years ago and have followed its development and expansion since. This research project provided an opportunity to examine the sustainability challenges that the village movement has faced since its inception by considering it in light of my perspectives and experiences in marketing and communications in the private sector.

This research has summarized the societal challenge related to an aging population in the U.S. that is larger than can be adequately served through current public health, social services, and health care systems. Increased longevity is a positive health advancement as those who reach age 65 are expected to live longer than ever before. Older people are on pace to outnumber children for the first time in our country’s history by the year 2035, and the quality of life for our oldest citizens must be considered and creative approaches to their health and wellbeing should be explored. The member-serving and member-driven village model is an innovative solution to the needs of older people who wish to age well at home in their own communities – needs largely unaddressed thus far by existing local, state, or federal institutions and programs. The village nonprofit model to date has been primarily membership driven – both in financial terms through membership fees and in operational and governance terms through the effort of member leaders who volunteer their time on an ongoing basis. As a research subject, the potential to harness highly involved, passionate member-leaders who are so deeply embedded in their village organizations was an intriguing undertaking. Distinctive challenges perpetuate from the grassroots design of prototypical village organizations, and this research sought to determine whether more formal
internal communications processes could channel member passion toward achieving their organization’s strategic goals.

This research has highlighted that village organizations, and perhaps especially villages that are straddling the adolescent and mature phases of the organizational lifecycle, may need to revisit their core offerings and prioritize internal processes to better prepare their organizations for continued growth. Programs and services must be clearly defined to internal and external stakeholders, otherwise, village organizations run the risk that perceptions of membership value will suffer. The most powerful resource that typical village organizations possess is the group of highly involved member and volunteer leaders who ensure that members receive the benefits and value of their membership investment – by giving both their time and money. Village organizations should seek to understand, inform, and engage these internal stakeholders at every level by drawing on their experiences, input, and motivations, some of which have been captured and reported here. Lastly, having an ongoing strategic planning process in place that includes internal and external marketing and communications components is critically important for keeping stakeholders (the primary village ambassadors) engaged and committed into the future. The village model has great potential and meets certain needs of the older population that no other governmental agency, nonprofit organization, or private business can currently offer in the same personalized way, and it is worth continued effort to find creative sustainable solutions that will enable it to thrive.

Limitations and Future Research

This research is limited in scope, confined to one case study village nonprofit organization in California. As discussed, several variations of the village model are in operation among the hundreds of existing villages in the U.S. and the hundreds of others currently in development. The focus of this study is narrow in order to explore internal village communications and member-to-member motivations and commitment more deeply within a case study organization. Findings included here are based on the characteristics of one organization and cannot necessarily be generalized to villages broadly, other community-serving nonprofit organizations, or the nonprofit sector overall; however, nonprofit organizations that share similar organizing characteristics could benefit from the fundamental assessment and planning recommendations. The approach, perspectives, and interpretation of the findings herein represent my unique experience and the information gathered through the contributions and conversations that were generously provided by stakeholders associated with the case study organization. My hope is that information discovered during this inquiry will serve as a springboard for further research into any number of areas related to the long-term sustainability of the village model in its various forms, but most especially in the area of internal communication.
References

de Clerck, T., Aelterman, N., Haerens, L., & Willem, A. (2020). Enhancing volunteers capacity in all-
volunteer nonprofit organizations: The role of volunteer leaders’ reliance on effective management processes and (de)motivating leadership. Nonprofit Management and Leadership, 31(3), 481–503. https://doi.org/10.1002/nml.21444


# Appendix A: Prepared Interview Questions for Semi-Structured Interviews

## Table A.1 Pre-Determined Interview Questions by Organization Level

<table>
<thead>
<tr>
<th>Category/Question</th>
<th>Organization Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organizational Strategy</strong></td>
<td></td>
</tr>
<tr>
<td>What information about strategic goals does the Board communicate internally?</td>
<td>Board, Board Committee</td>
</tr>
<tr>
<td>Does the Board involve committees and leadership teams with strategic goals? How is this accomplished?</td>
<td></td>
</tr>
<tr>
<td>How does the Board balance the need to provide transparency at different levels of the organization alongside challenging developments?</td>
<td></td>
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<tr>
<td>What information from within the organization matters most to the Board?</td>
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<tr>
<td>Is there information that you are not currently receiving that would help you to be more effective in your role(s)?</td>
<td></td>
</tr>
<tr>
<td>How does the Board receive progress updates and/or concerns from committees and program teams on key initiatives?</td>
<td></td>
</tr>
<tr>
<td>Who communicates internally to members, staff, and volunteers on behalf of the Board? How is this accomplished (frequency, by whom, through which channel(s))?</td>
<td></td>
</tr>
<tr>
<td>What do you see as the biggest challenge for the organization’s long-term sustainability?</td>
<td></td>
</tr>
<tr>
<td><strong>Team/Group Leadership and Coordination</strong></td>
<td>Advisory Committee, Program, Team, Neighborhood</td>
</tr>
<tr>
<td>Explain the current mission for the PLC/NGC as you understand it.</td>
<td></td>
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<tr>
<td>What is your understanding of the organization’s current primary strategic goals? How do you receive this information?</td>
<td></td>
</tr>
<tr>
<td>How often do you meet with the team/group you lead to share information from the leadership meetings you attend? Do you feel you have the right amount of information to meet the needs of your team/group?</td>
<td></td>
</tr>
<tr>
<td>How often do you meet with your team/group to receive information? Do you feel you receive the right amount of information you need to lead your team/group? To report to organizational leadership?</td>
<td></td>
</tr>
<tr>
<td>Is there information that you are not currently receiving that would help you to be more effective in your role(s)?</td>
<td></td>
</tr>
<tr>
<td>What types of collaborative initiatives have you been involved with along with other staff/groups?</td>
<td></td>
</tr>
<tr>
<td>As a member of the ___, how do you become aware of what other teams are working on?</td>
<td></td>
</tr>
<tr>
<td>Where do you see the biggest challenges in information flow within the organization? What suggestions do you have to improve information flow within the organization and/or between teams/groups?</td>
<td></td>
</tr>
<tr>
<td><strong>Volunteer Motivation</strong></td>
<td>All</td>
</tr>
<tr>
<td>Why do you volunteer?</td>
<td>All</td>
</tr>
</tbody>
</table>
Author’s Bio

Charis Hanshaw has over 30 years of professional experience in operations management, research, and marketing and communications with private organizations that range in size from boutique marketing consultancies to international research corporations. Charis has served in leadership roles and contributed to strategic planning at various levels throughout the majority of her career. She has applied systems and design thinking in her operations leadership roles and contributed as a key member of management, strategic planning, and marketing committees during pivotal periods of acquisition and rebranding, as well as domestic and multinational expansion and contraction.

An early beginning in operations within the food manufacturing sector exposed Charis to product marketing and research and development where she prepared research materials, proctored interviews, monitored data collection and integrated findings into marketing and communication initiatives. Charis soon shifted her professional focus toward client-serving marketing and research firms in the San Francisco Bay Area with companies including AC Nielsen and Ipsos-Vantis where she continued to streamline internal operations through the formation of efficiency and knowledge management committees while serving on research project teams. Charis later founded an independent research analyst consultancy while also co-founding a family-owned residential real estate company, for which she led strategic planning and marketing. Most recently, Charis has served as lead Editor and marketing support at LSA, an environmental services organization, while pursuing her degrees.

Charis holds a BA in American Studies from U.C. Berkeley, an interdisciplinary program with a dual concentration in Sociology and Psychology. She is currently pursuing her Masters in Nonprofit Administration from the University of San Francisco where she serves as the Vice President of Communications for the Nonprofit Student Council. Charis also currently serves on the Communications Committee for Berkeley Ballet Theater. Charis is committed to applying her comprehensive leadership experience and recently acquired nonprofit management competencies to mission-driven organizations that promote healthy aging and enhance the quality of life for older adults.