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Leadership Development of a Nonprofit Organization: Implementation of Succession Planning

Raven Neal

Consultancy Project
Executive Summary

Organization: Gardner-Webb University College of Education

Project Title: LEADERSHIP DEVELOPMENT OF A NONPROFIT ORGANIZATION: IMPLEMENTATION OF SUCCESSION PLANNING

Candidate: Raven Neal

Consultancy Coach: Dr. Jeffrey Hamilton

Defense Date: April 05, 2022

Authorized by: Ebony Summers-Fogel, Chapter President

Approval

This consultancy project was submitted by Raven Neal under the direction of the persons listed below. It was submitted to Gardner-Webb University College of Education and approved in partial fulfillment of the requirements for the degree of Doctor of Education at Gardner-Webb University.

_____   _____
Dr. Jeffrey Hamilton, Faculty Advisor   Date
Gardner-Webb University

_____   _____
Ebony Summer-Fogel, Site Advisor   Date
Chapter President

Abstract

LEADERSHIP DEVELOPMENT OF A NONPROFIT ORGANIZATION: IMPLEMENTATION OF SUCCESSION PLANNING. Neal, Raven, 2022: Consultancy Project, Gardner-Webb University.

This project investigated the reasons why the Lambda Nu Zeta Chapter of Zeta Phi Beta Sorority, Inc. is struggling with members not running for leadership positions and adequate succession planning. The project presented a leadership academy manual as an intervention to the lack of members stepping up to run for leadership positions. The leadership academy focuses on leadership development through knowledge building, shadowing, and mentoring. The projected outcome of implementing this manual is the members of the Lambda Nu Zeta Chapter would feel competent and confident enough to hold a position and to fulfill its obligations fully. The Lambda Nu Zeta Chapter of Zeta Phi Beta Sorority, Inc. is made up of dynamic women who are passionate about the sorority's mission and vision. The women in this group are committed to their community and take pride in being a small but mighty chapter. They refer to themselves as the small chapter with a big heart.

Keywords: leadership development, succession planning, sorority leadership, women leaders

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1 Introduction

1.1 Project Purpose

The Lambda Nu Zeta Chapter of Zeta Phi Beta Sorority, Inc. is a graduate chapter based in Summerville/Ridgeville, South Carolina. The chapter is relatively small in size which has been their status historically. Each chapter of the sorority is required to have a functioning executive board that serves as the leader of the chapter. Typically, a term for the leadership positions ranges from 1 to 2 years. Members who hold leadership positions have the option to run for that office again even if running unopposed. The chapter currently has an executive board where positions have been held for 4 plus years. This has been primarily due to other members not stepping up to run for leadership positions. There also have been years where each position on the executive board was not filled. Current leaders in the chapter have expressed burnout, some in a subtle fashion and some more assertively. Many members have stated the same eight to 10 members hold positions year after year and expressed there needs to be a change.

The executive board is made up of the president, three vice presidents, secretary, assistant secretary, treasurer, treasurer secretary, parliamentarian, chaplain, historian, and keeper of properties. The executive board meets once per month prior to the chapter meeting to discuss any business that needs to be presented at the meeting. During the all-member chapter meetings, business usually flows well. Chapter members are cordial and supportive of one another and ideas that are presented. There is a wide range of members within the chapter; some have been members for over 40 years, and others have joined less than a year ago. The members have diverse backgrounds professionally, including administrators, teachers, medical personnel, and mental health practitioners to name a few. Though so much talent exists within the chapter, there is still a slow response to holding leadership positions, which impacts the succession planning of the chapter.

1.2 Associated Documents

A professional literature review was completed in support of this project. The search consisted of leadership within sororities, leadership development and succession planning within nonprofit organizations, and leadership development for women. The common themes found in the research were importance of structure, importance of having a diverse program, and importance of mentorship.

1.3 Project Plan Maintenance

The plan for the project was initially outlined between the project manager and project host. The project manager then presented a proposal to the chapter members who voted unanimously to move forward with the project. The project manager recruited a small task force who assisted with planning and

implementing the project. The project manager and task force planned to meet virtually every other week for 1.5 hours. The project manager also provided the project host an update twice during the active planning and will complete a final review prior to implementation. The project manager and task force created a tentative timeline and revisited it monthly. The task force began meeting on February 7, 2021 and met consistently thru the end of June. The task force began meeting again in September to complete the project by mid-October 2021. Any changes that needed to be made occurred between the project manager and the task force who served as representatives for the chapter.

2 Project Scope

2.1 Outline of Partnering Organization's Objectives

2.1.1 Objectives

This project would assist the sorority chapter with succession planning. The development of the leadership academy would be a tool the chapter could use to have a form of training for the chapter members who might have an interest in running for a leadership position but may not feel prepared. The sorority chapter leadership as well as the members agreed to this project due to concerns that the same members are cycling through the leadership positions and are burned out. The leadership academy fits into the chapter leadership wanting to have a solid succession plan, wanting to preserve members, and wanting members who have not served to have the knowledge and confidence to serve.

2.1.2 Success Criteria

The initial success criterion was the chapter members voting to approve the project. This proved that there was a need, with consensus by all chapter members. The next success criterion was participation of the chapter in the data collection. Half of the members completed the survey and four members participated in a virtual interview, which was the number of interviews wanted by the project manager and task force. The data collected from the members were shared with the project host who was pleased with the information collected. Based on the data collected, the project is projected to have a positive impact on the problem faced by the chapter.

2.1.3 Risks

There is minimal risk associated with this project. The only risk identified throughout the project was the members as well as the task force losing interest in the project. Throughout the sorority year, there are various activities and initiatives that must be fulfilled regardless of there being proper leadership methods established. This could easily push the idea of the leadership academy aside.

2.2 Outline of Student's Objectives

2.2.1 Objectives

The project manager's objectives were to pinpoint where the lack of interest in running for leadership positions was stemming from. Another objective was to create an intervention that would address the lack of interest in running for leadership positions. An additional objective which is an addition to the scope of the project was to address membership

retention. The intervention for this objective was to develop a mentorship program along with the social embellishment committee.

2.2.2 Success Criteria

The project manager measured the success of the project through the reoccurring themes in the data which reflected there is more of a competency issue versus a commitment issue and the ability to meet the competency needs through the creation of a leadership academy manual. The long-term success of this project will be determined once the leadership academy manual is implemented. The hypothesis is the chapter will experience more members running for leadership offices.

2.2.3 Risks

The identified risk is the chapter as well as the task force losing interest in the project. The risk was minimized first by having an official vote to approve the project from the executive board as well as the membership. There being a loss of interest from the task force as a risk was minimized by the ability of the project manager being able to individually complete the leadership manual if needed.

2.3 Definitive Scope Statement

This project was responsible for exploring the reasons behind the lack of members running for leadership offices within the chapter and developing an intervention to address the reasons presented.

3 Deliverables

3.1 To Partnering Organization
- Leadership academy manual estimated due date September 18, 2021
- Formal process for the sister-ship mentoring program newly named Sizter 2 Sizter estimated due date September 18, 2021

4 Project Approach

4.1 Project Lifecycle Processes

Once the project was approved by the project hosts, executive board, and membership, a task force was recruited to assist with the development of the project. The approval process for the project was key and an advantage that other projects may not have. The approval on the leadership and membership level meant that all parties involved saw a need for this project. The task force was made up of two members of the chapter, one who serves on the executive board and the other who has served previously on the executive board. Both have been members of the chapter for over 5 years. Under the guidance of the project manager, the task force met and broke the project into three phases. The first phase was assessment and data gathering. Here, the task force began by hypothesizing the research question/problem. Data were collected using a mixed methods design: quantitative through an anonymous survey and qualitative through virtual interviews. Post-implementation, there will also be a focus group held; however, this will occur after this project is completed. The task force used the data analysis to create the outline for the leadership academy. The committee met twice a month and worked on one area each meeting together as a team. The project manager presented to the project host in between the first two phases to discuss the data findings and to share the idea of the intervention being developed. The project manager presented an update to the executive board during Phase 2. Both presentations went well, and all parties expressed satisfaction. Phase 3 consists of presentation of the leadership manual to the executive board and then to the chapter for implementation.

4.2 Project Management Processes

The project manager served as the lead in managing all aspects of this project. Any changes to the project were decided by the task force and taken back to the project host by the project manager. Keeping the task force small assisted with the stability of the project. All task force members took notes during the meetings. The project manager kept the master copies to be added to the manual.

4.3 Project Support Processes

One of the processes the task force was sure to implement was to ensure the leadership academy manual stayed in line with the organization's principles. The task force frequently reviewed the chapter's bylaws to ensure nothing was noted in the manual that would be in opposition to the chapter's governing documents.

4.4 Organization

4.4.1 Project Team

The project manager, due to restricted time to fulfill the project deliverables, recruited for a task force. The task force was made up of the project manager, two members from the chapter, and the chapter secretary (for the purpose of requesting documents needed). The task force, excluding the chapter's secretary, met twice a month most months. The meetings were virtual through video. In the initial meeting, the task force created an outline for the manual and each visit tackled one or two of the items on the outline together.

4.4.2 Mapping Between Lambda Nu Zeta and Student

This project began with an open dialogue between the project manager and the project host. The project host clearly communicated a task force was needed to assist with the project due to time constraints. Once the task force was assembled, there was a constant flow of communication between all three parties. The majority of the communication occurred between the project manager and task force, with communication to the project host coming from the project manager; however, due to the organizational relationship of the host and task force, communication was able to flow fluidly.

The flow of the project ran smoothly, despite a few meetings being missed. The task force stayed in contact through email and text messages when needed. See diagram below.

Project Manager	Taskforce	Project Host

Project question: Why is there a succession plan issue? Why aren't members running for leadership positons?

Meeting with chapter leadership: Approval for project received from the executive board as well as vote of approval from the membership

Development of the taskforce, schedule of meetings

Data collection by way of anonymous survey and interviews. Determined there was a compentency issue versus commitment issue as to why there hasn't been solid succession planning.

Project manager along with taskforce explore idea of leadership academy manual.

Development of the manual using the data results as a guide. Created table of contents based on key themes. Met with taskforce regularly to fill in content. Presented manual to executive board and then to the chapter.

5 Communications Plan

Communication for this project was key, as there were several moving parts in developing the leadership academy. Communication was frequent and detailed to ensure the steady movement of the project. There was a schedule of meetings along with areas of the project that were covered.

Purpose:

The agenda for each planned meeting was discussed during the first couple of meetings along with dates and time frames for meeting. Each participant was expected to come prepared with input for each topic being discussed.

Communication method:

Meetings occurred via video thru Google Meet. Follow-up check-ins occurred via text messaging and were opened to be initiated by any task force participant.

Cadence for communication:

The task force was scheduled to meet every 2-3 weeks. Follow-up text messages occurred as needed.

Owner and stakeholders:

The project manager, Raven Neal, was the owner of the communication plan. The stakeholders were the task force members: Katrina Bell; Tara Ancrum; and as needed, the organization's secretary, Serena White. The project hosts, Ebony Summers-Fogle and DaNine Fleming, will be provided updates as needed.
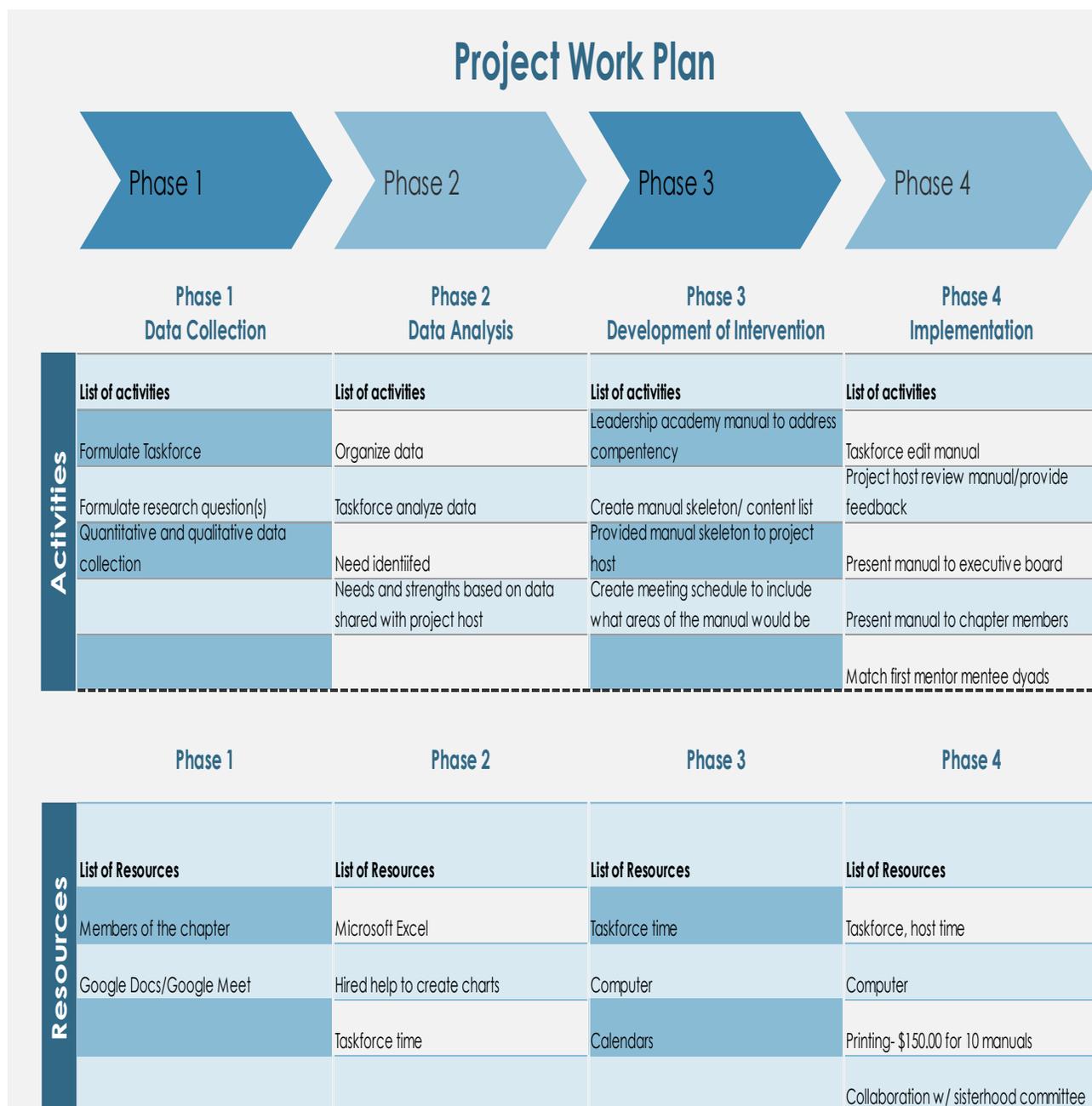
6 Work Plan

6.1 Work Breakdown Structure
See below.

6.2 Resources
See below.

Project Work Plan

Phase 1	Phase 2	Phase 3	Phase 4

Phase 1 Data Collection	Phase 2 Data Analysis	Phase 3 Development of Intervention	Phase 4 Implementation

Activities

List of activities	List of activities	List of activities	List of activities
Formulate Taskforce	Organize data	Leadership academy manual to address compentency	Taskforce edit manual
Formulate research question(s)	Taskforce analyze data	Create manual skeleton/ content list	Project host review manual/provide feedback
Quantitative and qualitative data collection	Need identiifed	Provided manual skeleton to project host	Present manual to executive board
	Needs and strengths based on data shared with project host	Create meeting schedule to include what areas of the manual would be	Present manual to chapter members
			Match first mentor mentee dyads

Phase 1	Phase 2	Phase 3	Phase 4

Resources

List of Resources	List of Resources	List of Resources	List of Resources
Members of the chapter	Microsoft Excel	Taskforce time	Taskforce, host time
Google Docs/Google Meet	Hired help to create charts	Computer	Computer
	Taskforce time	Calendars	Printing- $150.00 for 10 manuals
			Collaboration w/ sisterhood committee

7 Milestones

Milestone Number	Title	Forecast date
1	Chapter in favor of the project unanimously	Nov. 2020
2	Data analysis reveals members are committed to the chapter	Dec. 2020
3	Leadership academy manual goes to print	Nov. 2021

8   Metrics and Results

A mixed methods research design was used. This consisted of one quantitative and one qualitative component.

The quantitative tool used was an online anonymous survey that contained descriptive and exploratory questions using Google forms. I met with the task force to discuss the purpose of the survey and what we wanted to know based on the research question. The problem this organization is facing is a lack of members running for leadership positions; at times, leaving some positions vacant and no solid succession plan. The hypothesis is if the members participated in leadership development, they would feel competent and confident enough to run for leadership positions. We created a 13-question survey that addressed commitment and competency.

The data gathered showed a theme of the ladies in the chapter being committed to the organization. All stated they planned to remain in the chapter for the next 1-3 years. All stated they had someone they could confide in within the chapter, and most of the participants have been in the chapter 5-7 years. The data show that 69.2% of the participants have run for a leadership position since being in the chapter. The exploratory questions on the survey provided data on the individual participant's strengths and needs as well as how they viewed the leadership of the chapter at this time. In line with the hypothesis, the participants identified the following as needs: Roberts's Rules of Order/parliamentarian training, leadership training, organization and time management, risk management, clarification of leadership positions and expectations, public speaking, conflict resolution, mentoring, shadowing, and learning more about the business of the organization. The needs expressed show there may be a competency issue hindering members from running for leadership positions; however, being that most of the participants have run for a position, it leaves the question of if the other 13 members who did not complete the survey can be generalized to the findings of the survey.

See Appendix A for quantitative data.

The qualitative method used was virtual interviews. At the time of this method, there were 26 financial members of the Lambda Nu Zeta chapter. Four members were randomly selected to participate in interviews by using the wheel of names application. The random members were sent an email with project details and appropriate disclosures. Once the member accepted the invitation to participate, on the day of the interview, they were sent a secure link to join.

Interviews were held virtually using Google Meet. All participants had their cameras on the entire time to ensure the identified participant was answering the questions.

The interviews were completed by Raven Neal, doctoral candidate; Katrina Bell, project task force member; and Tara Ancrum, project task force member.

Each participant was asked the same four questions:

1. What made you join the Lambda Nu Zeta chapter of Zeta Phi Beta Sorority, Inc., and why do you choose to stay active?
2. Have you registered and attended a conference on the state, regional, or national level? If so, what did you learn?
3. What are your thoughts about reoccurring Sorors (chapter members) holding the leadership positions in the chapter?
4. Do you feel you are a leader in the chapter? If so, how can you help leader other Sorors (chapter members) become leaders? If not, what do you need to become a leader in the chapter?

During the interviews, each interviewer took handwritten notes. Once the interviews were over, the interviewers' compiled answers were recorded.

The interviews were informative. The participants appeared to be comfortable, represented by all speaking openly and freely. All told their personal attachment to the organization, and all are highly committed to the organization and would like to see its continued success. All participants acknowledged the recycling of the same members running for leadership positions within the chapter. There was a theme of understanding and accepting some members holding positions at length, justified by them being good in the role and trusted, therefore needing to stay. There was acknowledgment that development of skill is needed to assist other members in becoming more comfortable running for leadership positions.

See Appendix B for interview transcript.

Research error:
- Interview responses may have been better captured if they were audio/video recorded.
- Four participants is a small sample size; their responses may not be a strong representation of the entire 26-member chapter.

9 Risks, Constraints, Assumptions

Risk assessment		
Risk	*Level	Mitigation plan (if high or medium)
Project host loses interest in the project	Low	
Task force lack of engagement	Medium	Keep task force engaged by meeting regularly. Assign task to task force, show gratitude for their participation, discuss their perception of the benefit of the project regularly.

Note. *High, Medium, or Low (use Risk Assessment Matrix)

Contingency Plan (Plan B): Having a task force has been an asset to the project when it comes to ideas, task completion, and assessment of relevance and need; however, if the task force disbands, the project manager will be able to continue the project independently. The schedule of completing the project has been scripted.

9.1 Constraints
This project began with a limited amount of time to get it accomplished. The initial time frame was 8 months. Another constraint was the project had to go through two levels of approval, one with the leadership team and the other with the membership.

9.2 Assumptions
- I assumed the membership would be as excited about the project as I was.
- I assumed there would be a great difference of opinion based on identified needs.
- I assumed there would be minimum barriers to completing the project.

10 Financial Plan

Project Deliverables:
1. Electronic and printed copy of the leadership academy manual: $150.00 ($15.00 x 10).
    Quote received from Krafty Ks Custom Design for print and binding of manuals. Front cover color; preceding pages black and white.
2. Implement mentorship program:
    The subcommittee assisting with the mentoring program decided to order t-shirts for the mentor and mentee. The shirts were $20.00 each x eight members. Committee will use the resources of the chapter secretary to gain information pertaining to the membership for matching purposes. There is a subcommittee assisting with this deliverable.

Total Budget $310.00
$150.00 for the printing of the manuals–donated by project manager
$160.00 cost of t-shirts–chapter expense
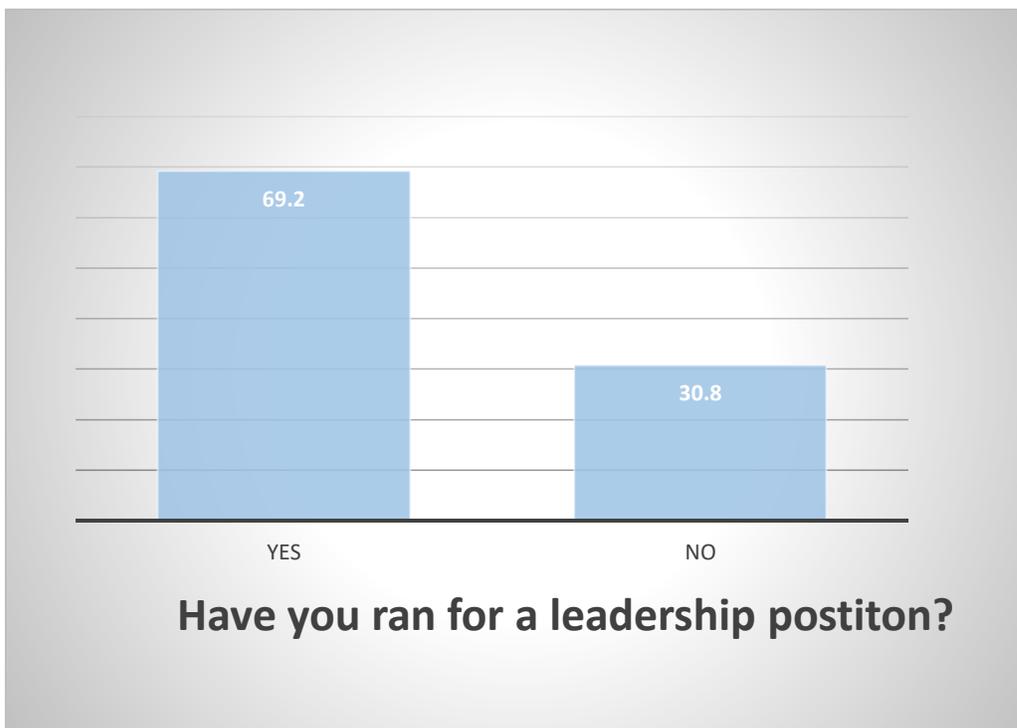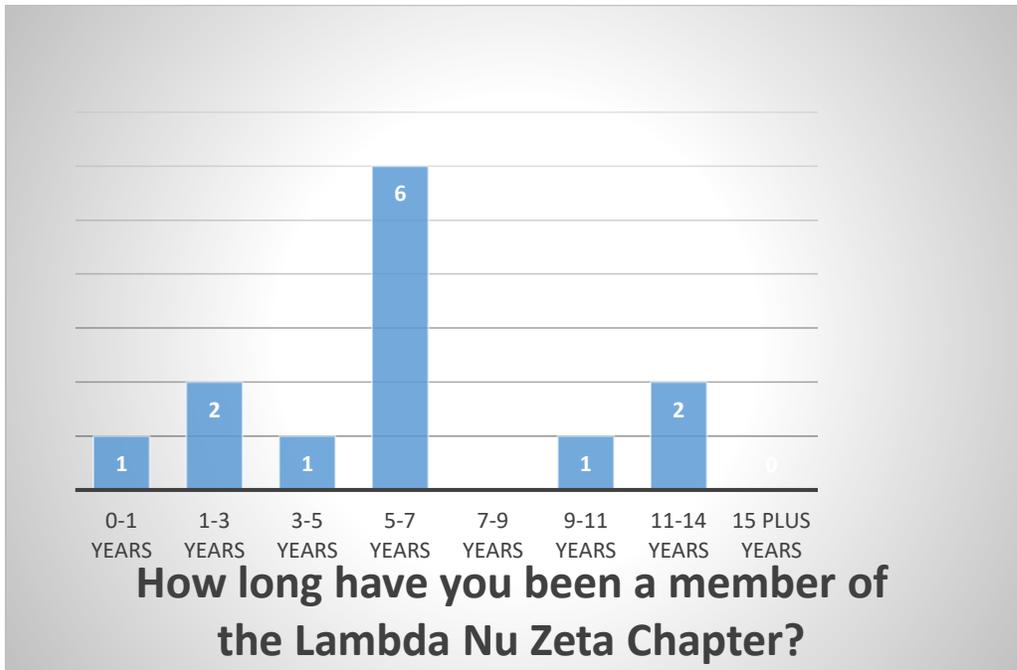
11 Quality Assurance Plan

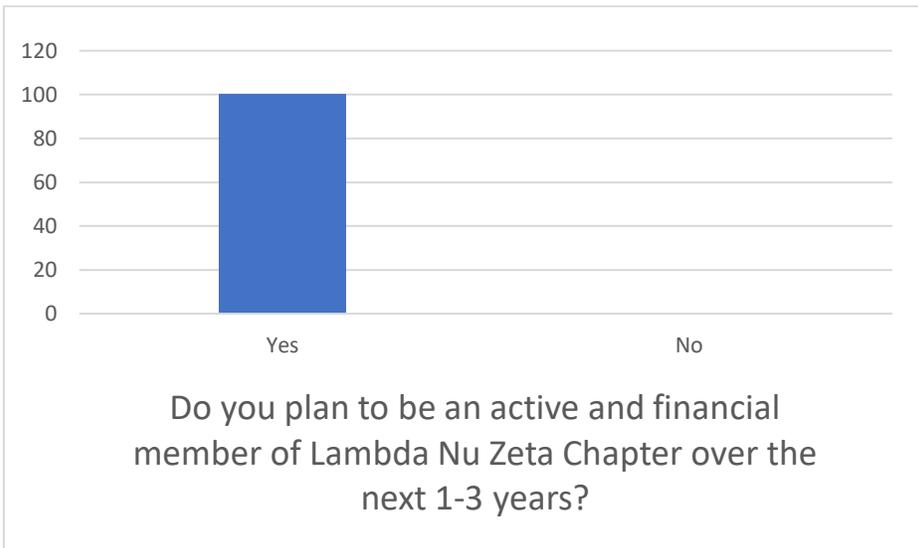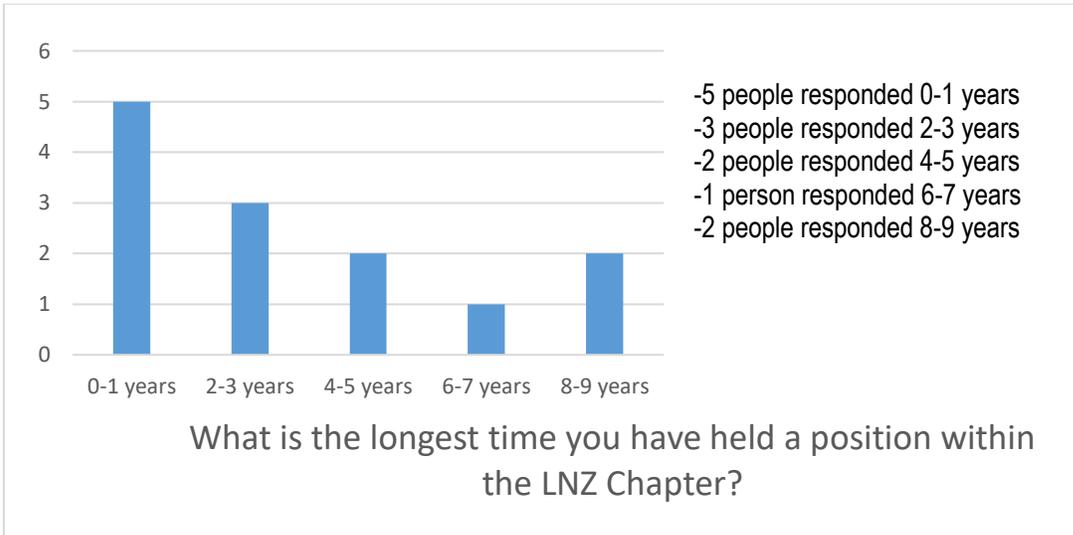Task Force: checks and balances, processing of ideas

Purpose: Kept the overall purpose of the project at the center of the activites completed

Beneficial: Using the data gathered from members kept the deliverable based on what the data reflected were needs.

Appendix A

Quantitative Data-Survey

How long have you been a member of the Lambda Nu Zeta Chapter?

Have you ran for a leadership postiton?

-5 people responded 0-1 years
-3 people responded 2-3 years
-2 people responded 4-5 years
-1 person responded 6-7 years
-2 people responded 8-9 years

What is the longest time you have held a position within the LNZ Chapter?

Do you plan to be an active and financial member of Lambda Nu Zeta Chapter over the next 1-3 years?

120

100

80

60

40

20

0

Yes   No

Do you have a Soror in the chapter you can go to for guidance and support?

120

100

80

60

40

20

0

Yes   No

Do you feel the chapter openly supports your ideas when voiced?

Do your personal goals and values align with the Sorority's goals and values?

Do you understand the organizational structure of the sorority and our chapter specifically?
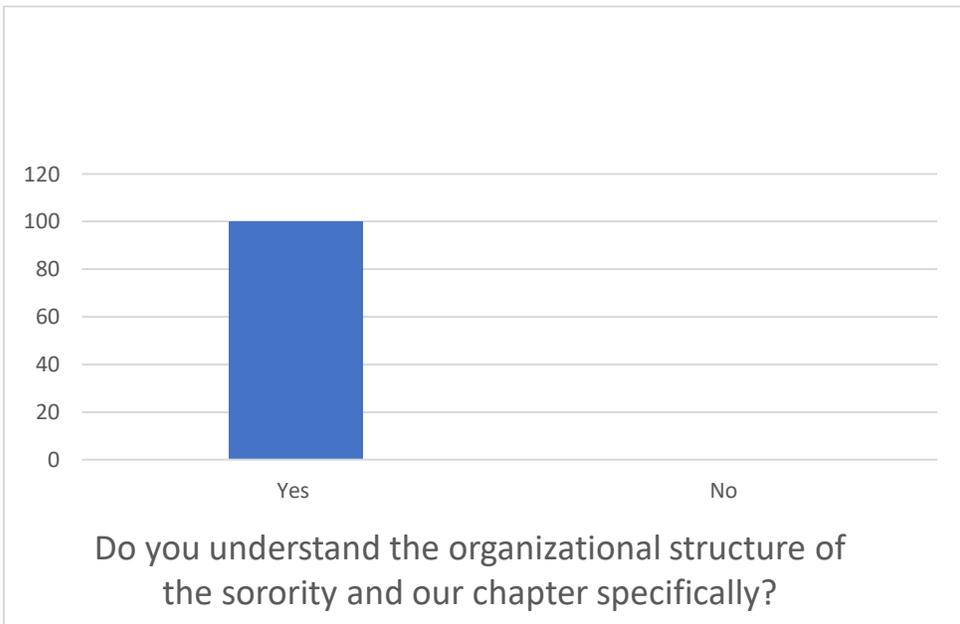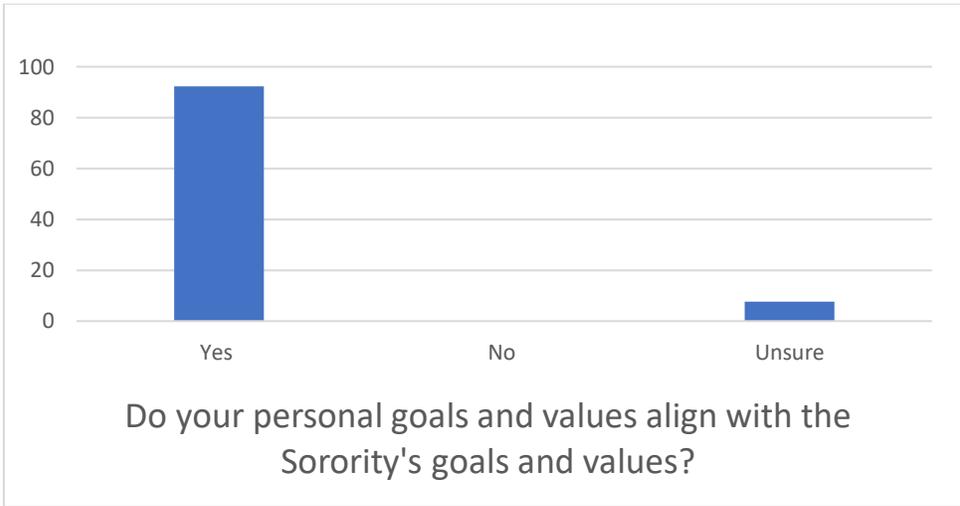
Do you possess any skills that would make you a good candidate for a leadership position? If yes, please list.

1. Creativity, Takes Initiative, Dedication
2. Good listener, try to make sure all voices have a chance to be heard
3. N/A
4. Dedicated to service
5. I have been Basileus, 3rd Anti I am currently chair of St. Jude & American Cancer society
6. Organization, Mathematical Skills, Youth Activities
7. I have skills, but I am not I am not interested in a leadership role. a leadership role at this time
8. Yes. Leader, open communication, scholastic training and achievement and experience.
9. Not currently
10. I'm organized and good at being a part of a team
11. Responsible
12. Empathetic, time management, proactive, team player, cooperative
13. No answer

What skills/training do you need to feel better prepared for a leadership role in the chapter?

1. Robert's Rules of Order
2. Learning more about Roberts Rules of Order
3. I'm in a leadership role and have held this position for some time but I can learn to be better organized
4. Understanding the requirements of each position and a support team
5. ZOL & Risk Management
6. Public Speaking, Handling Difficulties,
7. I had several positions but would like to give support to the younger Sorors. ort to the younger sorors. I am here to give my support
8. Parliamentary procedures
9. n/a
10. Clearer expectations about participation in leadership
11. Time management
12. Leadership workshops and shadowing the president and Vice President.
13. More training on the business aspect of Zeta

Have you read the chapter bylaws? If so, what is your understanding of its purpose?

1. No
2. Yes, to provide our chapter with guidance, processes, and procedures so that we remain consistent and effective.
3. Yes

4. I have not read the recent updated bylaws.
5. Our bylaws align with our National Constitutional bylaws & govern us locally in operations and activities
6. To develop strong women to impact their communities that embodies, service, scholarships, sisterhood, and finer womanhood
7. No. I don't recall seeing the new bylaws, but I am sure they are available if I need to read them.
8. Yes. It aligns with the constitution and states addendums as well as governance of/for the chapter.
9. To provide guidance and information necessary to maintain order and keep the sorority's purpose and goals.
10. Not in a few years, but I understand the purpose
11. To provide guidance and structure
12. I have but it's been a while. I have to refamiliarize myself with them.

What are your concerns (if any) regarding the leadership of Lambda Nu Zeta Chapter?

1. None
2. The same Sorors are running for office and leadership opportunities. It would be great to see new faces.
3. Sometimes it feels as though only a few Sorors are doing the bulk of the work; it would be nice if more Sorors felt comfortable taking leadership positions and doing the work of Zeta
4. The same individuals are in Leadership roles and will eventually burnout.
5. It never really changes the same 10 cycle through the executive positions. With new leadership comes new ideas, new energy, and new opportunities
6. N/A
7. I would like to see the scholarship amount increased.
8. That more Sorors will step up and be willing to lead (and not from the side or be passive aggressive when there are things they don't like. Speak your concerns or be quiet.
9. No concerns
10. We need more people stepping up and being active in leadership.

What are your suggestions to improve leadership within the Lambda Nu Zeta Chapter?

1. Shadowing program
2. Not sure
3. To bring everyone on one accord
4. Pairing individuals with leadership to learn different roles
5. Make this leadership academy part of our chapter foundation grow & equip potential new leaders, review and amend, if necessary, the bylaws every 2 years consistently.
6. Have training at least once a year

7. None at this time.
8. Same as above.
9. No suggestions
10. Continuous training and open communication within the chapter about leadership
11. Mentoring opportunities for positions prior to running for a position
12. None at the moment
13. None

Appendix B

Interview Questions:
1. What made you join the Lambda Nu Zeta chapter of Zeta Phi Beta Sorority, Inc. and why do you choose to stay active?
2. Have you registered and attended a conference on the state regional or national level? If so, what did you learn?
3. What are your thoughts about reoccurring Sorors (chapter members) holding the leadership positions in the chapter?
4. Do you feel you are leader in the chapter? If so, how can you help leader other Sorors (chapter members) become leaders? If not, what do you need to become a leader in the chapter?

Interviewee #1

Q1- I came in as a Zeta under Lambda Nu Zeta, I like the small in size but still get it done way. I stay active so that I am able to vote. I have been financial and active since I joined the chapter
Q2- Yes, State conference numerous times and I have been a delegate. I have taken notes and being the information back to the chapter. Learned various rules and regulations and the importance of bylaws.
Q3- It takes a lot of dedication and commitment. I feel we are doing very well. There are lots of emails to keep us all informed. I feel we can be a little better I'd like to see others step up because it's always the faithful few. I have currently held me office for a long time but I am dedicated.
Q4- Yes, If someone wants to hold a position I can help guide them. I have personally made a commitment to train the assistant to my role to be better in her position. We hold positions and forget others might want to learn so versus just doing it I want to do better with showing other how I do it. My hope is that more Sorors become leaders in the chapter.

Interviewee #2

Q1-I joined in undergrad. As far as the local chapter I knew a few people in the chapter. I stay active because if I am in something I like to participate.
Q2- I have participated in Boule-virtually. I learned the process of how to choose new leadership and gain an understanding of what they are working on and what they want to change for the future in relation to the sorority. I learned about risk management what we need to do to limit risk and learning what could cause problems.
Q3-Like in other organizations some people don't want to step up but will help in some way. Some trust that the people in positions are doing a good job however change is

good as long as the new people are helping not hurting the chapter. I think sometimes people get stuck in their leadership role.
Q4-Yes, Good leaders are also good followers. We need training in all the leadership roles to all will know what is being asked of them within that position. Would like to see the leadership academy be beneficial to everyone and be effective for the chapter.

Interviewee #3

Q1- I wanted to be a part of the sisterhood. Saw the sisters could get along. I made a commitment and followed through.
Q2- Yes, I attended several conferences. I learned more about the sorority its goals and missions. I also learned stuff about the sister some good and some not so good.
Q3- Sometimes it's necessary for some to stay in leadership positions because there isn't enough members or members aren't willing to learn and grow. Some have difficulty with technology leaders must be tech savvy.
Q4-Yes, however no official title I try to lead by example. I show my commitment by doing what I can do from home. Information is offered regularly through the chapter. I think the leadership academy is a good idea some are seeking ways to grow and some are not but at least the information will be there it's up to the individual to participate. Need training on Fonteva, ZOOM and email etiquette

Interviewee #4

Q1- I knew of several Zeta members, attending the interest meeting and felt Zeta and this chapter was the right choice for me. There chapter members were very welcoming I felt I fit in with the sisterhood. Community service and scholarship I related to I received a scholarship with the organization as a student.
Q2- Yes, Attending one of the conferences held in Columbia, SC. There was a lot of information presenting, voting. I enjoyed watching the professionalism of the chapter Sorors.
Q3- As an opportunity to grow it may take mote that a year in a position. There should be options for other willing to serve as well.
Q4-Yes, I bring willingness to work I don't feel there is anything I can't do because I am willing to work. I am able to share my past experiences with the 15 years I have within my career I am willing to show others. I feel the leadership academy is a good foundation for current and new members this will be a great tool for the chapter.

Appendix C

Lambda Nu Zeta Chapter

Zeta Phi Beta Sorority, Incorporated

Leadership Academy Manual

Created November 2021

By: Soror Raven Neal, Doctoral Candidate-Gardner Webb University

Soror Tara Ancrum, Project Task Force

Soror Katrina Bell, Project Task Force

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Appendix D

Professional Literature Review

This literature review is an analysis of some of the recent literature on leadership development and succession planning within organizations. This literature review was done to assist the Lambda Nu Zeta Chapter of Zeta Phi Beta Sorority, Inc. with the challenge of members not running for leadership positions within the chapter. This chapter is a graduate chapter of college-educated women serving the Summerville and Ridgeville, South Carolina areas. The sorority chapter is currently experiencing the recycling of the same members who are providing leadership within the chapter. The question posed is, "Does structured leadership development promote interest in running for leadership positions?" The data collected from the sorority members showed more of a competency issue versus a commitment issue. The intervention being considered is the development of a leadership academy manual containing pertinent information in one place. The manual would educate chapter members who were interested in holding a leadership position but felt unprepared.

There were several searches done to pinpoint the most relevant literature:

a. leadership within sororities,

b. leadership development and succession planning within nonprofit organizations, and

c. leadership development for women

The search under leadership within sororities produced the least amount of relative literature in relation to research found regarding undergraduate chapters. The research shared how holding a leadership position while in a sorority during

undergraduate work impacted academic success and future job placement. The two preceding searches produced relevant literature that would assist in developing a plan for the Lambda Nu Zeta Chapter. Within this literature review, nine articles and two book chapters were used to gather relevant information.

Within the research, the following themes were present:

a. importance of structure,

b. importance of having a diverse program, and

c. importance of mentorship.

Structure and training proved to be a reoccurring theme in the research in relation to leadership development. It is my belief that organizations that want to thrive must have leadership staff in place who are committed, competent, and can work with others in a manner that is unique to their organization. The Lambda Nu Zeta Chapter of Zeta Phi Beta Sorority, Inc., though a small chapter, is active in its community, holds its principles as a top priority, and is a committed group of women who view themselves as family. The sorority chapter has an executive board made up of the leadership positions within the chapter. Each person commits to serve for 2 years; however, most have served longer due to the lack of others stepping up to run for leadership positions. Currently, the chapter does not have any type of formal leadership training or manual for the chapter members currently in or aspiring to be in leadership positions. Leadership development in many organizations is a high priority. Organizations continue to allot funds for training; however, according to researchers, many organizations report a lack of leadership skills among their staff (Lacerenza et al., 2017). According to Lacerenza et al. (2017), for organizations to receive a return investment from training, the training must be focused

and targeted on what works. This statement applies to the project with the sorority chapter as it was important to know what was needed by the members. Data were collected by survey and interview. The data collected were analyzed, and the intervention being created directly comes from what the members expressed was needed. One framework of assessing training effectiveness is categorizing into one of four criteria: reactions, learning, transfer, and results. At this time in building a strategic plan of strengthening leadership development within the Lambda Nu Zeta chapter, reactions and learning are the primary forms of assessment. As far as reaction, the chapter members have shown by participation in data collection that they are excited about having leadership development structure. Members expressed having a leadership academy would benefit the chapter currently and in the future as the chapter continues to thrive. As far as learning, the chapter sees the importance of skill building. The leadership manual being developed will become a part of the leadership training for the chapter and will be revised as needed until the chapter decides to implement something different. One hypothesis for the project is, "The leadership manual will increase the interest in leadership positions within the membership." Specifics in relation to leadership development among women are discussed in Hopkins et al. (2008). According to the data presented in the article, women make up more than half the managerial workforce, have unique leadership strengths, and require unique leadership development (Hopkins et al., 2008). The authors share three differences in leadership for women versus men based on the research conducted: Women use a participative/democratic style of leadership; women behaviors of leadership consist of teamwork, empowerment, sharing information, care for employees, and leadership effectiveness; and effectiveness of leadership between

women and men does not differ overall. Women tend to be most effective when leading an environment that is female dominant (Hopkins et al., 2008). The theme of the importance of structure is shown by the author's recommendation of a 7-category framework: assessment, training and education, coaching, mentoring, networking, experiential learning, and career planning (Hopkins et al., 2008). In relation to the Lambda Nu Zeta chapter, this framework supports the direction of the leadership academy being implemented. The leadership academy idea came to light after observation and feedback from members and the leaders of the chapter. The data collected also served as an assessment of the needs expressed by the members. Training and education will be addressed through the manual to include coaching and shadowing. The shadowing portion of the academy is when members interested in leadership positions will have the opportunity to shadow the person currently holding that position. The leadership academy has an extension that covers mentoring. Each new member will be matched with a member who has been in the chapter for at least 1 year. In implementing the above, the idea is to benefit both the individual and the chapter. Members will be educated and will feel confident to run for leadership positions. Rothwell and Kazanas (1999a) researched the most frequently used leadership and management development methods, which consisted of unplanned on-the-job training, in-house classroom training, and planned on-the-job training. The most effective method of the above was planned on-the-job training. This ties into shadowing and coaching, which are being incorporated in the leadership academy for the Lambda Nu Zeta chapter. Rothwell and Kazanas (1999a) discussed the importance of a learning environment where there is a common goal, mission, and vision; however, leaders must recognize that

everyone has different learning needs. These differences should be addressed in a comprehensive leadership and management development program. The five learning types are (a) cognitive or informational needs; (b) psychomotor or skill needs; (c) affective, feeling, or attitudinal needs; (d) advancement or educational needs; and (e) developmental needs (Rothwell & Kazanas, 1999a).

Succession planning is an important reason for having a structured leadership and management plan. Organizations should be prepared to continue thriving through crisis or loss of someone in a leadership position. The Lambda Nu Zeta chapter has been able to continue moving forward with its annual goals, despite losing some leadership positions; however, this has not been done without flaws. There are members doing double duty, and there are some key positions remaining vacant. Rothwell and Kazanas (1999b) provided the following as the importance of succession planning: (a) creating a surplus of skills, (b) identifying individuals capable of assuming more responsibility, (c) ensuring continuity of operations in the event of sudden loss, (d) identifying individuals as possible replacements for key positions, (e) pinpointing positions in which no successors have been identified, and (f) creating a talent pool of likely candidates for succession from inside. Rothwell and Kazanas (1999b) suggested succession planning occur a minimum of once per year and be structured in a manner that best suits the organization. Rothwell and Kazanas (1999b) however recommended including the following questions for content purposes: What should be the program's purpose? What are the desired results? What positions should be included or excluded? How often should the succession plan be carried out? Who should be involved in identifying and developing possible successors? What forms or other data gathering methods should be used? How will

confidentiality of the process and its results be ensured? How open should the process be? The Lambda Nu Zeta chapter executive board presently meets yearly for planning and monthly for brief follow-up prior to the chapter meeting. Some of the above structured questions would be an asset to the yearly meeting and will be shared with the executive board.

Diversity within leadership development/programming is important as the people who are being developed into leaders all have different backgrounds and experiences. Though succession planning as described above is straightforward, Cavanaugh (2017) discussed meeting various needs through succession planning as a way of developing talent. According to Cavanaugh, there should be formal and informal learning opportunities to include mentorship, webinars, and formal programs both internal and external to the organization. Cavanaugh went on to describe that experiential learning and mentorship are ways to diversify leadership training and development. The culture of the organization would need to embrace the learning opportunities as an expectation and reward for them to become best practice. As a consultant assisting an organization with leadership development and succession planning, assisting the organization with diverse learning opportunities may be needed. According to Hedge et al. (2008), consulting consists of five stages: (a) brand awareness, (b) building relationships, (c) being able to write proposals that meet the needs of the client, (d) designing to delivery, and (e) evaluation of interventions. These five stages would assist consultants in creating a diverse plan to help organizations with their needs to include leadership development. In looking at sororities specifically, Biddix (2010) stated serving in leadership positions within a sorority help develop leadership skills overall. According to Biddix, leadership

skills such as working with diverse populations, handling adversity, balancing conflict, and friendships, standing up for one's beliefs, event planning, delegation, and time management are developed by students while serving in a sorority; however, these skills can be generalized to members in a graduate sorority chapter as well. As a graduate chapter member, all the above skills come into play as well with holding leadership positions within the chapter. In addition, graduate members usually are also balancing a career and family along with other commitments. According to Taylor (2010), leadership is a predominant focus within sororities to include leadership institutes, national conferences, workshops, and mandatory trainings. These opportunities give members the opportunity to gain knowledge in reference to sorority leadership as well as leadership in general. Taylor also reported women leaders thrive better as leaders within a program that has been developed specifically for women. These programs include cultivating values, developing and maintaining relationships, and defining vision. These leadership proponents are incorporated in the Lambda Nu Zeta chapter. Within the data collected, all but one participant felt the values matched up with the sorority's values, which can be suspected drew them to the organization. Long and Snowden (2011) reported there are significant gains between officers versus non-officers within a fraternity or sorority. The gains consisted of a sense of belonging, diverse interactions, interpersonal relationship skills, leadership skills, personal development skills, self-worth, and intrapersonal competence. The research in this article also showed that members who serve in chapter leadership positions experience an increase in abilities to make them better individuals socially and professionally. Though the Lambda Nu Zeta chapter is a graduate chapter, many of the members interviewed during data collection mentioned that they incorporate

their professional expertise in their roles in the sorority and vice versa.

Another common theme present in the research is the importance of mentorship in leadership development. Mentorship is a portion of leadership development that has been incorporated in the leadership academy being developed for the chapter. The idea is that mentorship will help with succession planning as well as retaining members. According to Vitale (2019), though their research did not show a significant impact in the use of a structured mentoring program, many of the nurses self-reported high levels of exemplary leadership practices. Mentorship takes practice; the profession will continue to need to improve the profession and to assist with succession planning (Vitale, 2019). Leadership development should feature both vertical and horizontal development skills to address education, exposure, and experience (Colby & Salinas, 2021). The exposure portion of this point refers to exposure to mentors and role models. This article reviews the Chancellor Academic Leadership Development Program, which is a yearlong program consisting of monthly sessions that contain information. Mentorship is a large portion of this program. The mentor/mentee matches meet frequently to discuss progress and issues (Colby & Salinas, 2021). According to Colby and Salinas (2021), like previous authors, leadership development programs must go beyond the traditional leadership models when considering meeting the needs of women leaders. The suggestion is to include opportunities for connection and long-term and short experiences to support learning. The leadership academy being developed for the Lambda Nu Zeta chapter takes into consideration these recommendations, which play on the strong relational bond already established within the chapter. The chapter is usually engaged in all activities presented to the chapter. They currently participate in social embellishment and activities that are

required that are more educational and in place usually on a yearly basis.

Summary

This literature review consisted of the following searches: leadership within sororities, leadership development and succession planning within nonprofit organizations, and leadership development for women. Overall, there was limited research on leadership within sororities other than some data on undergraduate/collegiate chapters. There were common themes present within the research to include (a) importance of structure, (b) importance of having a diverse program, and (c) importance of mentorship. These themes were consistent with the implementation of the leadership academy being developed for the Lambda Nu Zeta chapter. The questions answered within the research were as follows: Will leadership skills gained through serving in a sorority leadership role roll over into personal and professional leadership? Would adding a mentoring program benefit succession planning of the organization? If effectively trained, would members gain increased confidence to serve? The answers to these three questions are yes. Leadership development promotes knowledge and confidence building, which would then impact members' motivation to run for leadership positions.

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