

NAVIGATING SUCCESS: EXPLORING THE DYNAMICS OF
NONPROFIT SECTOR EFFECTIVENESS AND GOVERNMENT
RELATIONS

by

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Defining success for a nonprofit organization can prove to be a challenge, especially considering the diversity of stakeholders that they report to. While the sector has yet to implement a standard for how to measure impact, many have attempted to do so in their own organizations. This study explores ways in which nonprofit organizations might evaluate their impact utilizing the framework of interdependence theory, including three measurements: financial stability, partnerships, and program evaluation. Results demonstrate that participating nonprofits continue to face challenges in assessments, though some also expressed understanding of more nuanced forms of evaluation. While understanding these results may not create implications for the sector, they can help understand how nonprofits might generate improved assessments and be more efficient in creating long-lasting impacts.

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CHAPTER 1: INTRODUCTION

If you were asked to name the most successful nonprofit you can think of, what would it be? Would it be organizations that have been running for over 100 years, like the American Red Cross? Or would it be an organization that has helped address poverty, health, and education in more than 130 countries, like The Bill and Melinda Gates Foundation? Maybe it would be Food for Lane County, a local food bank that helps feed families throughout Lane County, Oregon.

The definition of what success means might look different for everyone and in fact, measuring or defining “success” in the nonprofit sector is very difficult due to a lack of a standard set of measures and procedures to evaluate performance (Glassman and Spahn, 2012). Still, understanding what success means may be key to evolving the nonprofit sector to better serve those in need. This paper defines a nonprofit organization as one that is precluded, by external regulation or its own governance structure, from distributing its financial surplus to those who control the use of organizational assets (Sonnevli et al., 2006). Additionally, it defines the nonprofit sector as the collection of private entities defined as nonprofit (Sonnevli, 2006).

Though the nonprofit sector may be considered a recent phenomenon, the values, and institutions behind it have a deeper, more complex history (Sonnevli, 2006). Many of the values found in the nonprofit sector, including charity and philanthropy, have religious origins. We see common themes of donations, anonymous giving, soup kitchens, and more throughout the history of Judaism and Christianity (Sonnevli, 2006). The term philanthropy itself comes from ancient Greece, where the act of philanthropy was seen as a cultural norm (Sonnevli, 2006). While the nonprofit sector continues to hold a long history of

traditionally philanthropic values, it has also evolved alongside society to be something unique.

Nonprofit-Government Relations

Much like the nonprofit sector itself, the cooperative effort between governments and nonprofit organizations is far from a new phenomenon. Salamon (1984) suggests that the cross-sector relationship has substantial roots in American history, well before the American Revolution. In particular, Salamon notes the tradition of colonial governments assisting private educational institutions. The Commonwealth government helped Harvard college through a special tax and paid a portion of the university President's salary until 1781 (Salamon, 1984). As Salamon (1984) discusses, the sentiment behind the relationship was that education had a public purpose and therefore deserved public support. There was a similar pattern in healthcare as many major healthcare providers noted receiving government funds (Salamon, 1984).

Government support of nonprofit organizations has been especially prevalent in social welfare. As urbanization and industrialization became rampant in the mid-nineteenth century, state and local governments relied heavily on voluntary organizations to relieve public suffering (Salamon, 1984). Salamon (1984) reveals how much of the funding for such organizations came from taxpayers, marking a key period in the dual efforts to assist the public cause. The federal government became even more involved in the human service field in the 1960s, establishing an even greater partnership between nonprofit organizations and government where government support easily surpassed private giving in nonprofit revenue (Salamon, 1999). However, as conservative political forces grew in the early 1980s, Reagan sought to strengthen the nonprofit sector by

removing government from the picture, resulting in significant reductions of federal spending in many of the key fields where nonprofits are present (Salamon, 1999). Salamon (1999) notes how conservative notions of “getting government out of the nonprofit sector’s way” overlooked the fact that many nonprofit organizations relied upon government funding, so policy changes that reduced government presence in the sector also meant a reduction in nonprofit revenue. During an era where governments globally were investing in nonprofit organizations to deliver publicly funded services, the United States moved in the opposite direction, curtailing significant partnerships that were already in existence and applying more pressure on nonprofits to compensate for social welfare services (Salamon, 1999).

CHAPTER 2: REVIEW OF LITERATURE

The Existence of Nonprofit Organizations

Nonprofit organizations exist in numerous capacities and across fields. Salamon (1994) describes the global third sector as an array of self-governing private organizations that are not dedicated to distributing their profits to shareholders or directors, but rather to pursue a public purpose outside of the formal apparatus of the state. One way that the sector can be separated into two categories: member-serving or public-serving. Member-serving organizations make up only 10 percent of the nonprofit sector, and though they serve the public in some capacities, their focus is on providing services to members of the organization rather than the public itself (Ott and Dicke, 2001). Ott and Dicke (2001) argues that most nonprofit organizations fall under the category of public-serving, or organizations whose primary goal is to serve the public at large. A nonprofit organization that qualifies as a public-serving organization must exist solely for charitable, scientific, religious, literary, or educational purposes (Ott and Dicke, 2001). As Salamon (2015) notes, public-benefit nonprofit organizations must also follow four structural elements. They must: (1) be privately controlled but not profit-seeking, and therefore are exempt from federal income taxation; (2) be primarily focused on assisting the broad public and not just immediate members of the organization; (3) be eligible to receive tax-exempt charitable gifts from both corporations and individuals; and (4) provide services as opposed to distributing funds to other service providers.

A large topic of debate within and outside of the nonprofit sector is its role in society. Every part of the world has experienced an increase in both the amount and scope

of nonprofit organizations (NPOs) and nongovernmental organizations (NGOs) (Mirabella et al., 2007). The past several decades has been fundamental in the growth of the sector in the United States, from a little over 12,000 organizations in 1940 (Frumkin et al., 2001) to over 1.8 million today ([LearningCandid.Org](https://www.learningcandid.org/)). These third sector organizations have also grown in programs offered, many now providing resources surrounding education, research, training, and academic programs (Mirabella, 2007). Salamon (1984) discusses how nonprofit organizations deliver a larger share of the services that the government finances than government agencies themselves. Thus, governments can utilize nonprofits as an extension of public services, and nonprofit organizations can access a larger pool of funding from the government. Nonprofit organizations may also assist in promoting civic engagement with its common perception as separation from the public sector, despite how dependent it may be on federal support (Leroux, 2007 and King et al., 2019). While nonprofits require strong community support and relationships with local leaders, research suggests that they may still need to distinguish themselves from government authorities to be effective (Hula, 1997).

There have also been critics of the sector. Researchers found that some right-leaning politicians contend that nongovernmental organizations undermine national sovereignty and that their rising influence in national and international politics are a threat to democracy (Jenkins, 2012). Still, literature suggests that the consequences of neoliberalism, including a widening income gap and defunding government programs and initiatives alongside the reification of individual responsibility has fostered hyper-individualism that delegitimizes collective action (De Gruyter, 2023). The shift away from public services through privatization and towards market-based solutions impacted the nonprofit sector,

which many then expected to provide needed programs and services (De Gruyter, 2023). There is then debate in literature surrounding the origins of the sector, as Salamon (1994) suggests that as the confidence in the capability of the state diminishes, distinguishing factors of nonprofits, including their small scale, flexibility, and capacity to engage grassroots energies, make them ideal in filling the gaps where human needs are not yet met.

Interdependence Theory

While many theories make logical arguments surrounding the existence of the nonprofit sector, the theory that our study utilizes as its framework, interdependence theory, proposes that government and nonprofit entities have a cooperative relationship, and that both rely upon one another to succeed (Bae et al., 2018). Generally, the theory suggests that governments tend to rely on nonprofits in providing public services, while nonprofits simultaneously rely on government support to fulfill their missions (Bae et al., 2018). Bae et al. (2018) suggest that governments offer grants and contract out to nonprofits to provide public services, and as a result, the nonprofit sector is more likely to increase. Many studies conducted at county, state, and international levels have validated the theory, finding that the more aid governments provide to nonprofit organizations, the greater the size of nonprofits (Bae et al., 2018). Additionally, Salamon et al. (2000) find that, with data from across Europe, Latin America, and various “developed” countries, there is a positive relationship between a nonprofit organization’s size and government support.

Salamon (1984) suggests that the partnership between governments and the nonprofit sector has long been overlooked not due to its novelty, but rather because of a weakness in theory. The failure to understand the extent of government-nonprofit

relations is thus due to the limitations of the conceptual framework regarding how the sectors interact. Interdependence theory, then, seeks to provide guidance on understanding the nuances of the public-nonprofit sector partnership and exists because of both voluntary and government failures. There are many variations of the theory including voluntary failure, which seeks to explain why nonprofit organizations might look to the state for assistance through four inherent limitations of the voluntary sector: *philanthropic insufficiency*, which states that voluntary organizations are unable to generate an adequate scale of resources of an advanced society and that philanthropic resources are most prominent where they are least needed; *philanthropic particularism*, in which nonprofits and their donors have a tendency to focus on particular demographics, creating disparities in who receives assistance; *philanthropic paternalism*, where nonprofits face the challenge of establishing rights to benefits in contrast to privileges, thus facing the difficulty of fostering empowerment and self-worth; and *philanthropic amateurism*, where volunteer-driven organizations are faced with a lack of professionalism due to the challenge of bringing in professional approaches to address complex issues (Salamon, 2000). Included in interdependence theory is new governance theory, which expands upon systematic limitations in government operations. Salamon (2000) argues that the theory's framework lies in the belief that government bureaucracies can be inefficient and unresponsive for the public and are often driven by cravings for power in place of the public interest. Additionally, while government resources may be ideal for delivering common-issue services, they are not nearly as flexible as they need to be to meet the range of essential human services needed and lack adequate ability to address growing complexities in society.

Relatedly, *government failure theory* posits that governments not only cater to the public majorities, but that more heterogeneous communities have more preferences unfulfilled by governments, leaving greater room for nonprofits to pick up the slack (Bae et al., 2018). While government failure theory implies that the failure of the government to satisfy its citizens' preferences will result in the promotion of activities by the nonprofit sector, interdependence theory suggests that a more cooperative relationship between the two sectors exists (Bae et al., 2018). Salamon (2000) discusses the theory as a discussion of a partnership that allows access to the advantages of the nonprofit sector, some of which include significant flexibility in administration, smaller scales of operation, and diversity in content of services coupled with the resources of the public sector makes for a logical compromise in the provision of public services (Salamon, 2000).

Interdependence theory has then come about because of the successes and failures in both the nonprofit and public sectors. The government may be able to utilize the perceived advantages of the nonprofit sector, including more flexible, higher quality, and specialized services (Mason, 2023). Also, nonprofits are often active in fields before government agencies can respond and therefore develop expertise, structures, and experience for governments to draw upon (Salamon, 1998). Nonprofit organizations can also mobilize political support to inspire government involvement (Salamon, 1998). Where the voluntary sector might fail in amateurism, particularism, or philanthropic insufficiency, the government can provide funding and support (Mason 2023).

While interdependence theory implies the function of the public and nonprofit sector relationship, it is not explicit in how to measure whether this partnership works effectively. The rapid professionalization of the nonprofit sector throughout previous

decades has pushed the sector towards greater efficiency and performance (Frumkin et al., 2001). As professional staff have begun to encourage more rigor and develop greater standards to measure performance, there has been more realization of competition within the sector, especially regarding cost efficiency or the ratio of administrative to total expenses (Frumkin et al., 2001). In addition to financial measures, how else might we assess the effectiveness of a nonprofit organization? Why might we look beyond funding for measures of success?

Measuring Success

Understanding the relevance of interdependence theory might help inform how to best measure the success of programs in the nonprofit sector. Interdependence theory discusses the key points of public-nonprofit sector relationships. As Salamon (2000) notes, this partnership is heavily based in dependency, both financially and as some might argue, professionally. With many new approaches to outlining success in the nonprofit sector emerging, especially surrounding more holistic perspectives that analyze programs with their complex nature in mind, the interdependence theory framework is key to grounding us in the give-and-take relationship that is part of the nonprofit sector's foundation. Human services nonprofits especially are increasingly providing a social safety net (Atouba et al., 2020), resulting in a growth of scrutiny and assessment of the allocation of government resources as questions arise regarding the effectiveness of where public funds are distributed (Willems et al., 2015). In other words, the government has a vested interest in the performance of nonprofit organizations that deliver human services, and that they (the government) are often paying for through grants and contracts.

As an interest in sustainability has grown in value for businesses across all sectors, frameworks for evaluating performance have surfaced, including the triple bottom line (TBL). The TBL framework involves three dimensions of performance: social, environmental, and financial (Slaper et al., 2011). The framework involves going beyond the traditional measures of profits, return on investment, and shareholder value to include both environmental and social dimensions (Slaper et al., 2011). There are challenges to implementing the TBL, however. Because the TBL goes beyond measuring organizations through profits and involves a greater number of stakeholders, decision-making processes must be made at a higher level of systems thinking, with decisions taken in a broader context to include the concept of society itself (Rogers and Hudson, 2011).

In addition to the TBL, many scholars have attempted to develop performance measurement approaches for the nonprofit sector. Lee (2014) discusses three representative examples, including balanced scorecard for nonprofits, public value scorecards, and a multidimensional, integrated model of nonprofit organizational effectiveness (MIMNOE). Though literature exists on select performance measurement tools in the nonprofit sector, there is limited analysis on the integration of these perspectives and ways in which the sector can implement them across frameworks (Lee, 2014). Some scholars have also noted the distinctive challenges of measuring nonprofit performance, specifically in contrast with the for-profit sector. Benjamin et al. (2023) notes that while for-profit actors tend to focus on financial measures of performance, nonprofits might see financial performance as an input rather than an outcome. Additionally, nonprofits must face multiple constituencies, such as funders, beneficiaries, government,

and communities when assessing their effectiveness, each often viewing effectiveness in a different criterion (Benjamin et al. 2023).

This study looks at three primary measures of success as a framework to evaluate the success of a program in the nonprofit sector: *financial stability*, *program evaluation*, and *partnerships*. Research suggests that the challenges in future sustainability for nonprofit organizations include stable funding and community connections (Rooney, 2020), and that program evaluation plays an essential role in the assessment of success (Hoefler, 2000). This study defines the financial stability of an organization by its ability to maintain its financial capacity, or the resources that give an organization the wherewithal to seize opportunities and react to threats (Chikoto-Schultz et al., 2016). Additionally, when discussing program evaluation, we refer to the process in which policymakers, planners, program managers, etc. inform and guide stakeholders to distinguish effective social programs from ineffective ones; launch new programs; or revise existing ones to achieve improved outcomes (Rossi et al., 2019). To define the concept of partnership, we utilize the definition Jennifer Brinkerhoff (2002, p. 21) offers to define them as both formal and informal collaborations in which a dynamic relationship among actors exists and is conducted through a shared understanding of the most rational division of labor based on the comparative advantages of each partner.

Financial Stability

Financial stability could be regarded as one measure of success. In discussing financial stability, this study occasionally uses the term sustainability interchangeably. Sontag-Padilla et al. (2012) discuss the challenges of defining financial sustainability. They broadly define sustainability as the ability of administrators to maintain an organization

over the long term. The definition of financial sustainability, however, as they note, may vary widely across sectors and depending on businesses structure, revenue structure, or overarching goals of the organization. Because nonprofits' financial outcomes are largely a means to accomplishing the organization's social mission, a nonprofit's ability to pursue its mission and its financial sustainability are inextricably linked, making the sector distinct in its measures of sustainability (Sontag-Padilla et al., 2012). Literature on nonprofit finances generally defines financial stability or sustainability in terms of maintenance. Bowman (2011) defines the financial stability of an organization as the ability to maintain financial capacity over time, while Pfeffer and Salancik (1978) includes the ability to maintain resources, but also the ability to acquire them. Sontag-Padilla et al. (2012) also note the long-term importance of maintaining the ability to be financially agile for nonprofit organizations, as many of them serve high-need communities that require consistently available services. Thus, the goal of financial stability for nonprofits is to maintain or expand services within the organization while simultaneously developing resilience to occasional, short-term economic shocks (Sontag-Padilla et al., 2012).

Many nonprofits rely on funding sources beyond the traditional charitable donation, often utilizing grants, sales of goods and services, and contracts for service as essential sources of income (Carroll et al., 2008). Additionally, available literature and frameworks including interdependence theory suggest that nonprofits rely heavily on the support of governments for improved financial stability, and that the size of the nonprofit sector is largely dependent upon the scale of financial support from local, state, or federal funding (Bae et al., 2018). Even so, many nonprofits struggle with uncertainty in levels of revenue. Dependency upon the "ability to acquire and maintain resources" prevents nonprofit

organizations from being autonomous in the financial decision-making process. Despite challenges with resource dependency, literature available suggests that revenue diversification may present an opportunity for greater financial stability and independence (Carroll et al., 2008). Some research suggests that the generally accepted solution for threats to nonprofit financial stability is the adoption of business practices such as commercial revenue, which many rationalize as means to achieving the organization's mission (Beaton, 2021). However, there are also concerns regarding whether the drive for nonprofit organizations to become financially stable risks unintended negative consequences, such as mission drift (Beaton, 2021).

A study conducted on key elements for identifying the success of educational programs in the nonprofit field found that financial stability was the greatest challenge for organizations (Rooney et al., 2020). Another study identifies a difference between short- and long-term financial objectives of resiliency and maintaining or expanding services, respectively (Bowman, 2011). The study recognizes financial sustainability as the intersection of both short- and long-term stability, requiring resilience to economic shocks while simultaneously making progress toward long-term objectives.

A literature review intended to inform financial sustainability identifies key practices for overcoming financial uncertainties. The review highlights key challenges and potential solutions for nonprofits, including the risk of relying on external funding sources, and the value in creating a "brand" for the organization, demonstrating accountability to funders, and promoting community engagement and leadership (Sontag-Padilla et al., 2012). Rather than identifying specific quantitative goals, this review outlines actions that can help improve overall financial sustainability through trust and community support.

Despite financial obstacles for nonprofits, research suggests that there are multiple routes nonprofit organizations can take to improve their financial stability. Nonprofits can work towards both short- and long-term financial goals in response to the economic environment and goals for expansion, while simultaneously gaining the trust of potential funders and community members. Nonprofit organizations can also diversify their revenue to increase financial stability. Though literature available suggests that the sector may be able to stabilize its resource dependency, interdependence theory implies that the nonprofit sector remains dependent upon the financial and managerial support of the public sector. Questions remain regarding whether revenue diversification might exist in tangent with interdependence theory and how nonprofit organizations perceive financial stability regarding their success.

Program Evaluation

Another way to assess an organization is through program evaluation. Increasingly, nonprofits are faced with the challenge of being asked to demonstrate the effectiveness of their services and programs, and, as a result, many are looking to program evaluation as a solution (Fine et al. 2000). The concept of program evaluation relies largely upon the credibility of a theory of change, which literature suggests should meet the following indicators of quality: *Meaningful*, in which a strong theory of change describes the organization accurately in ways the organization acknowledges and feels proud and is designed to accomplish something of value; *Plausible*, where, if followed, the courses of action described in the theory are likely to achieve the desired outcome objectives; *Doable*, or it is realistic and takes into account the organization's capacities given the context of its

environment; and *Testable*, where all elements can be assessed in regards to their implementation and quality, and all outcome objectives are defined using empirically verifiable indicators (Hunter, 2006). While there is seemingly unanimous support for program evaluation across the sector, Hoefer (2000) suggests that research regarding actual evaluation practices is still sparse. Much of the literature available describes how to increase evaluation practices through, for example, simplification and by encouraging evaluators to interact with stakeholders, rather than addressing why and how nonprofit organizations utilize evaluations. However, there is evidence that evaluation practices are a valuable method in ensuring accountability (Hoefer, 2000). In traditional models, the evaluation of a program typically involves employing an external evaluator to serve as an objective observer to collect, interpret, and present data to management. More recently, though, there has been a shift toward participatory evaluation models, in which evaluators engage program stakeholders, including staff and clients, in the evaluation process, using evaluative data to improve existing programs. While the participatory method risks objectiveness, literature shows that it can improve the analytic capacity of stakeholders and increase the likelihood of evaluation results being utilized to improve programs (Fine et al., 2000).

Since Hoefer's study was conducted over twenty years ago, literature regarding evaluation practices in the nonprofit sector has grown somewhat more substantial. One study works with 120 nonprofits, providing 40 with intensive interaction with training groups, 40 with semi-intensive interaction with training groups, and 40 with no interaction with training groups. The study discusses the Governance-Human Resource dynamic, suggesting that every individual in an organization will provide different cultural,

historical, and experiential perspectives, and that integrating and accommodating their experiences is an essential step for widespread community support (Powell, 2012). The study examines a charity deemed unsuccessful due to its lack of focus on its central mission, which presents challenges with rapid growth and financial instability, leading to long-term organizational unsustainability. Ultimately, the study found that provided training groups were pivotal in determining the success of nonprofits' sustainability.

Beyond outside program support, another study makes the argument that nonprofits can best serve the public good by conducting regular sustainability assessments (Jones et al., 2014). The study suggests that these assessments can offer advantages for organizations that integrate the practice regularly into both their missions and models, reviewing various sustainability reporting frameworks to identify their success rates. Despite challenges regarding the process of adoption and implementation of such sustainability programs, the general improvement of sustainability given the utility of the assessments makes for a more successful and sustainable organization.

As evaluations increase in popularity and more research has been conducted on the benefits of program evaluation, there have also been discoveries regarding the challenges that many evaluators face. Literature suggests that evaluators have found it difficult to create informative evaluations of some of the programs they were tasked with assessing, with barriers including stakeholder disagreement regarding the goals and objectives of the program or that program activities and resources were insufficient to have a reasonable chance to accomplish program goals (Rossi et al., 2019). In response to these shortcomings, the term evaluability assessment was coined and has since become a widely used tool for systemic evaluation planning (Rossi et al., 2019). Evaluability assessments are thus

undertaken to ensure that a program is ready to be evaluated prior to evaluators committing to do so and entail highlighting important questions about necessary preconditions to conduct an evaluation and identifying parts of the assessment process that might require iterating between steps before moving forward, including a description of the program model, an assessment of how well defined and evaluable that model is, and the identification of stakeholder interest in evaluation and the likely use of the findings (Rossi et al., 2019).

While most social programs have good intentions, they are often complex by nature, with foundations in social conditions that are resistant to change (Rossi et al., 2019). Unfortunately, well-intentioned programs that are misaligned with the root causes of the issues they attempt to address or that lack quality implementation are insufficient. Literature suggests that it is the effectiveness of social programs and uncovering the factors that undermine their effectiveness that are the goals of program evaluation (Rossi et al., 2019). While research in programmatic sustainability of nonprofits suggests that systematic evaluation is essential for the success and sustainability of a program, there is a lack of research that exists in response to the question of how nonprofit professionals perceive the value of evaluation.

Partnerships

Assessing a nonprofit's partnerships may also give insight into the organization's performance. Partnerships among sectors have proven to have valuable implications for the quality of the services provided by nonprofit organizations (Atouba et al., 2020). This study utilizes Brinkerhoff's (2002) framework surrounding partnerships to define them as:

“a dynamic relationship among diverse actors, based on mutually agreed objectives, pursued through a shared understanding of the most rational division of labor based on the respective comparative advantages of each partner. Partnership encompasses mutual influence, with a careful balance between synergy and respective autonomy, which incorporates mutual respect, equal participation in decision making, mutual accountability and transparency.”

Literature available addresses relationships between nonprofits and both private and public sector entities, and what tradeoffs each partner might exercise. One study analyzes what kinds of businesses the top nonprofits tend to partner with, offering insight into how other organizations may improve their sustainability or success through cross-sector relationships (Shumate et al., 2018). The study uses the symbiotic sustainability model (SSM) as its framework for inquiry, exposing a network of relationships between nonprofits and businesses and allowing researchers to explore these partnerships at both organizational and industry analysis levels. Using macro-level quantitative data, the SSM provides researchers with information that allows them to critically analyze these unique partnerships, their stakeholders, and the risks and rewards for both parties.

Further research conducted provides insight into the complex relationships between governments and nonprofit organizations. Increasingly, contracts are becoming less of a requirement as control might be attained through other conditions, such as funding sources and leadership (Gazley, 2010). Many theories exist regarding the collaboration between the two entities, including theories of exchange and resource dependence, as well as various other network theories (Gazley, 2010).

Our study uses the framework of interdependence theory to understand the collaborative relationship between the nonprofit sector and governmental organizations.

While much of the available literature does not provide direct insight into whether these partnerships are essential for a nonprofit's success, gaining knowledge into what existing partnerships for nonprofits are deemed successful is a start for understanding how they can provide reliable organizational sustainability.

CHAPTER 3: METHODOLOGY

In reviewing literature, researchers found that, while there was a general understanding of the value of financial stability, partnerships, and program evaluation each individually for nonprofit organizations, there was a gap in the understanding of the value of assessing the success of these three components to improve an organization at large. The objective of this study, then, is to look at these three primary measures of success to also understand the differences among nonprofit professionals in how they perceive success and governmental relations in the nonprofit sector. Using a comparative case study with Oregon nonprofit organizations, this paper aimed to determine what variations there are in results, and what those variations might suggest for the future of the nonprofit sector.

Oregon as a Case Study

The state of Oregon has a complex history, rooted in colonial and imperial powers. The state's foundations lie in exploitative practices and despite various efforts to make reforms, Oregon continues to suffer from the long-lasting impacts of its oppressive history (Johnston, 2009). Despite these challenges, literature shows that the population in the west is large and diverse, leading to a large nonprofit sector and a political culture that tends to support government involvement in community issues (Johnston, 2009). Between Oregon, Washington, and California, the states make up sixteen percent of registered charities in the US, generating over \$180 Billion in annual revenues (Basinger, 2014). Alternative research suggests, however, that nonprofit organizations in Oregon operate largely independently from the government, and that there is a greater relationship between

nonprofits and individuals than government (Pettijohn et al., 2018). Questions thus arise surrounding how nonprofits in Oregon function and what determines their success.

Research suggests that case studies are an ideal methodology to utilize when an in-depth investigation is required (Feagin et al., 1991). Case studies as a research method are used in many situations, often to contribute to knowledge surrounding the individual, group, organizational, political, social, and similar phenomena, and is also often utilized in research regarding social work (Yin 2014, p. 4). The case study method is useful for investigators to gain a more holistic perspective of real-life events (Yin 2014, p. 4), as we do in this study. Some argue that case studies as a research tool is less desirable than other forms of investigations, largely due to the lack of rigor of case study research as well as the concern that case studies provide little basis for scientific generalization (Yin 2014, p. 14-5). However, as Yin (2014) argues, case studies, like other forms of research, are “generalizable to theoretical propositions and not to populations or universes” (p. 15). Beyond the single-case study approach, the method of utilizing comparative case studies, as we do in this study, is an effective qualitative tool for the field of social research to synthesize information across both time and space (Bartlett and Vavrus, 2016). Additionally, the process-oriented approach has the tendency to see the world in terms of people, situations, events, and the processes that connect these, and explanations are based on an analysis of how some situations and events influence others (Bartlett and Vavrus, 2016). The comparative case study method thus offers valuable context and an important tool to compare information across organizations.

Participants

Participants in this study include executive staff from nonprofit organizations addressing similar issues (in this case, affordable and low-income housing) in Oregon. A purposive sample of organizations was selected to gain a diverse number of organizations using GuideStar.org, a website that has information regarding nonprofit organizations across the country, including 990 tax forms. The principal investigator then reviewed nonprofits of similar sizes and initiatives, though there was still some variance in annual revenue. The principal investigator then visited the websites of fifteen chosen organizations and cold-called and emailed each using the same script (seen in Appendix 1). Of the fifteen nonprofit organizations, five agreed to participate in the study. After contacting the organizations, nonprofit staff members referred the principal investigator to personnel in the organizations. Each participant was approached with the same informed consent form (Appendix 2).

There were a few limitations to the study. There were some inconsistencies in the positions of those interviewed. Of the five organizations that participated, six personnel were interviewed. Four individuals interviewed were their organization's executive directors while two were senior program officers for the same organization. While all personnel that participated had similar years of experience of working in the nonprofit sector, some were newer to their current organizations than others and may thus be slightly more limited in their organizational perspective. Additionally, while researchers attempted to find organizations of similar capacities, there is still variance among annual revenue, which may influence an organization's responses. The identity of each participant

and their organization has been kept confidential in this study to protect against any potential risk to subjects from answers provided.

The five nonprofit organizations chosen are only a small sample of nonprofits in Oregon. Resource and time constraints limited the number of nonprofits that were contacted, but other nonprofit case studies may be identified through various literature for a more holistic perspective of the sector in the state and in the country.

Organization	A	B	C	D	E
City	Portland, OR	Portland, OR	Portland, OR	Beaverton, OR	Tigard, OR
Groups Served	Houseless population, general community	Low-income, houseless	Low-income, BIPOC	Low-income, elderly	Low-income, general community
2022 Annual Revenue	\$1.04 million	\$1.02 million	\$2.79 million	\$2.39 million	\$4.42 million
Personnel	Executive Director	Executive Director	Executive Director	Executive Director	Senior Program Officers

Procedures

Research for this study was conducted by conducting video interviews with multiple nonprofit administrative professionals at five nonprofit organizations in Oregon, lasting roughly thirty minutes. During the interviews, the principal investigator asked open-ended questions, following up with clarifying questions or questions to gain greater understanding regarding specific situations or answers (full interview guide can be seen in Appendix 3). Each interview had a slightly different structure dependent upon subject responses, but interviews were roughly the same length and questions posed in the same manner. Each interview was recorded with the permission of the participants and later

transcribed into a written format, after which the digital recording was destroyed. The interviews began with questions regarding the participant's role at their organization, their responsibilities, how long they have worked at their organization, and what their organization does. Following these general questions, participants were asked more specific questions based on three separate themes: financial stability, government partnerships, and sustainability. Questions were based on participant's perception of the organization they work for, including how the participant defines organizational impact, what impacts the organization makes in the community, and what role the government plays in the organization and field.

Data Analysis

After interviews were conducted, responses from each case study were reviewed and analyzed for common themes and keywords regarding the study's three main measures of success: financial stability, partnerships, and program evaluation. The study then identified survey responses in each of these three categories for each case study as a "challenge" or "strength" for the organization given their perceived concern or confidence measured by themes and keywords. Organizational strengths and challenges were then reviewed altogether to find general takeaways.

CHAPTER 4: FINDINGS

This study asked five Oregon nonprofit organizations questions about their impact to better understand how they function and how potential measures of success could determine their effectiveness through the lens of interdependence theory, which helps us understand why nonprofit organizations might function the way that they do. We sought to answer three main questions to address these themes: How do nonprofit professionals perceive and attempt to measure organizational effectiveness? How might public-sector relations influence both organizational effectiveness and its evaluation? And, with these in mind and utilizing the study's three defined measures of success, how can the multidimensional nature of effectiveness best be theorized and evaluated?

Financial Performance

Throughout the interviews, all participants spoke about the government's role in their funding. Most individuals noted specific forms of funding, such as grants, but also certain taxes that allocate funds toward the organizations' causes. Organization A, for example, noted that "the big role the government plays here in our region is collecting tax funds that then are allocated...to our community organizations doing the actual work on the ground." Similar comments were made by Organization B, which stated that its "primary financial underpinnings are all governmental." While some organizations also discussed other forms of income, including donations, they all emphasized that the government holds control over much of their funding because of grants and tax funds received, implying the ability of the state to influence these organizations' capacity. This financial dependency resembles Bae et al.'s (2018) argument that nonprofits often struggle

to be autonomous in their financial decision-making processes due to their reliance on government for stability and consistent funding. Using Bowman's (2011) definition of financial stability, which involves the ability of an organization to maintain financial capacity over time, interview participants' responses indicate that their organizations would not be able to obtain financial stability without the assistance of the government. Additionally, it may be argued that these organizations do not have financial sustainability, as Carroll et al. (2008) suggest resource dependency and a lack of revenue diversification can inhibit stability.

The financial dependency of these nonprofit organizations on government resources also mirrors Salamon's (1998) discussion of interdependence theory. Organization B stated that the "procurement of low-income housing tax credits" helps to "fill the gap" of funding that the nonprofit organization faces when financing its programs. Additionally, Organization E stated how, with the help of government funding, it can function "much more rapidly and much more cost effectively [than the government], ...and still make sure that the government dollars [are] used for the highest and best purpose." These organizations describe a collaborative relationship that involves the advantage of providing public services in a more flexible and efficient manner in return for funding and resources, bearing resemblance to the basis of interdependence theory that states how the two sectors work together utilizing the nonprofit sector's efficiencies alongside the public sector's resources (Salamon, 1998). However, some organizations also discussed how these partnerships may exist beyond financial need.

Partnerships

Each organization interviewed discussed the dynamics of their existing partnerships, especially with the government. Again, this study uses the framework set up by Brinkerhoff (2002) to define partnerships, which include both formal and informal collaborations between actors, and are conducted through a rational division of labor based on each partner's comparative advantages. For example, Organization B spoke about how the government helps to facilitate a relationship with an electric company, where the organization's residents receive a low-income discount from the electric company that the government subsidizes. The energy tax credits are part of a program "by which the government provides these tax credits and then [is] able to give them to a corporation." The corporation does not lose money, the nonprofit fulfills part of its mission to assist its residents, and the government serves the public.

Other organizations made comments remarking on how the government recognizes their organization's need for development and will support them, and that they have enjoyed a "fairly supportive" relationship with the state. However, in the nonprofit's discussion of its partnership with the state, Organization A stated a limitation of the government, expressing how it may not always engage in "authentic community engagement process[es]." The nonprofit also noted that the organization "feed[s] information to the government" because it "can reach folks in a way that the government can't." Like these organizations' financial relationships with the state, Organization A's commentary on how it fills in the gap of community engagement that the government lacks reaffirm the existence of a cooperative relationship discussed by Salamon (2000) in his analysis of interdependence theory. These observations also maintain that the

relationships between government bodies and nonprofit organizations are increasingly complex as they may not be contracted or formalized, as discussed by Gazley (2010).

Program Evaluation

Many of the organizations lacked any form of formal evaluation or assessment for their programs, though they all noted how they might assess their impact long-term.

Organization A, for example, stated that it defines its impact “by seeing greater understanding and buy-in for long-term solutions, ...and also seeing more people with lived experiences feel empowered.” Organization C also noted impacts that lack clear

measurability, including “ensuring that diverse communities can live in Portland as they have for generations.” However, some organizations discussed their attempts to generate evaluations measurements. Organization E mentioned a mixed methods approach to evaluating its impact and programs, including both an annual report that assists with receiving funding in addition to qualitative research that helps to “shift narratives.”

Included in the qualitative analysis of the organization’s impact is the work they do with volunteers and what the nonprofit “is doing in terms of setting narratives and helping shift policy.” Organization B had a similar response, mentioning that while the “continued

stability and success” of their target population is part of the evaluation process, they also work “with service partners...to develop assessment matrices so that we can see how well we’re doing, what we can change in the future, and learn from success and failure.” While

Organizations E and B both discussed some form of evaluative measurements, they remained somewhat vague in how measurements are made and who conducts the

evaluations. Fine et al.’s (2000) discussion of program evaluation discusses the complexity

of the evaluation process, which might include engaging stakeholders or employing external evaluators. Most of the nonprofits interviewed lacked clarity in how they measure the success of their programs and did not appear to engage in as thorough evaluation processes as Fine et al. (2000) suggest is necessary for an accurate assessment.

CHAPTER 5: DISCUSSION

Interviews conducted with five nonprofit organizations and six nonprofit personnel across Oregon found that, generally, these organizations rely largely upon government funding to sustain their programs, revealing the challenges that nonprofit organizations face in achieving financial stability beyond funding from the state. These interviews also uncovered the strengths that these nonprofits have in the diversity and tradeoffs of their partnerships. Personnel interviewed suggested that partnerships with both government bodies and outside partners are essential to their program outcomes. While all the organizations interviewed discussed the value of their organizational impact, most of the nonprofits faced challenges with having clear evaluation processes in place to assess their programs.

The discussions that took place throughout this study's interview processes point to the value and validity of interdependence theory. This study found the cooperative relationship between the nonprofit and public sectors as described by Salamon (2000), in which nonprofits rely upon government to make up for its shortcomings in areas of funding and other insufficiencies that are largely resource-based, and the state depends upon nonprofits for their flexibility, diversity of services, and other perceived advantages to be apparent among the nonprofits interviewed. While these nonprofits make up a small number of those both in Oregon and in the United States, these results reaffirm the existence of a rather complex relationship between sectors that, generally, both serve the public well-being, and help to open the conversation regarding what frameworks best serve to measure a nonprofit's impact and program success. Despite limitations to the study restricting researchers' ability to make judgments or assess the nature of the

nonprofit sector altogether, and while these interviews do not have the capacity to represent the perspectives of organizations beyond those that participated, they do have the potential to help indicate what challenges or successes other nonprofits might the region face and how relationships with government persist throughout the sector. Results regarding financial stability and program evaluation practices also help open the conversation regarding what frameworks best serve to measure a nonprofit's impact and program success.

CHAPTER 6: CONCLUSIONS

Over the years, the nonprofit sector in the United States has experienced numerous fluctuations in both growth and decline (Salamon, 1999) and as the sector evolves, nonprofits are under increasing pressure to provide clear performance measures and demonstrate their impact in measurable ways (Fine et al., 2000). Utilizing three measures of success (financial stability, partnerships, and program evaluation), this study assessed the performance measures of five Oregon nonprofits, determining that each of these organizations faced various hardships in the areas of financial stability and program evaluation, and successes in partnerships. Research conducted also supports the existing framework of interdependence theory, reaffirming the existence of a cooperative relationship between nonprofits and government. While this study only looked at five nonprofits across a single region, results can be used to further determine ways in which nonprofits beyond Oregon can utilize these performance measures to better understand and improve their impact. Researchers hope that the results of this study help to lay groundwork on the research of nonprofit effectiveness, assisting in making the sector run more efficiently and, ultimately, reach communities in a more meaningful way.

Areas for Further Research

Various constraints limited this study from conducting research on a larger and more thorough scale. This field of research would thus benefit from a better understanding of the ways in which nonprofits measure performance and how performance measurements might further be evaluated, as well as how theories, such as interdependence theory in addition to others, are relevant in such analysis. Further

research may involve conducting a similar study with a greater number of organizations interviewed, more specific questions regarding organization's processes of measuring performance, or creating specific code books to analyze interviews more thoroughly. A study may also involve analyzing one or more organizations and their relationship with a government entity through interviewing both personnel at the nonprofit organization and government personnel that interact with the nonprofit to understand the cooperative nature of the nonprofit-public sector relationship based on the framework of interdependence theory.

APPENDIX

Sample Email Requesting Interview

Dear _____,

I hope this email finds you well. My colleagues and I are part of a team at the University of Oregon researching the differences among education nonprofit professionals in how they perceive success and governmental relations in the nonprofit sector.

We've identified your organization as a contributor in Oregon. We'd be very interested in setting up a 30-60-minute remote interview via Zoom to learn a bit more about your organization and its relationship with the government. These are confidential interviews, neither your name nor organization will be included in any final report or research paper. We do hope that anything we learn will be useful in supporting future research in the field.

If there are questions you'd prefer not to answer, that is absolutely okay; we can tailor the interview in any way you prefer to ensure you're comfortable during the process. We are looking for 3-5 employees to interview and are happy to meet one-on-one to make it more flexible for each individual or as a group.

I look forward to hearing from you!

Best,

Elle Knofczynski

Informed Consent Form

Consent for Research Participation

Title: Navigating Success: Exploring the Dynamics of Nonprofit Sector Effectiveness and Government Relations

Researcher(s): Elle Knofczynski, University of Oregon
Dyana Mason, PhD, School of Planning, Public Policy and Management, University of Oregon

Researcher Contact Info: XXX-XXX-XXXX, XXX-XXX-XXXX
ellek@uoregon.edu; dmason@uoregon.edu

You are being asked to participate in a research study. The box below highlights key information about this research for you to consider when making a decision whether or not to participate. Carefully consider this information and the more detailed information provided below the box. Please ask questions about any of the information you do not understand before you decide whether to participate. Is it ok for me to record this conversation?

Key Information for You to Consider

- **Voluntary Consent.** You are being asked to volunteer for a research study. It is up to you whether you choose to participate or not. You may also choose to end the interview at any point, or decline to answer specific questions. There will be no penalty or loss of benefits to which you are otherwise entitled if you choose not to participate or discontinue participation.
- **Purpose.** The purpose of this research is to better understand the relationship between the public and nonprofit sectors and gain insight into how the nonprofit sector defines success.
- **Duration.** It is expected that your participation will last approximately 30 minutes.
- **Procedures and Activities.** You will be asked to describe your job, organization, and whether you perceive the organization to be successful in its mission in an audio recorded interview. Afterwards I will send you some follow-up questions regarding your responses in a survey.
- **Risks.** Some of the foreseeable risks of your participation include feelings of anxiety or discomfort in discussing your job and workplace.
- **Benefits.** Some of the benefits that may be expected include helping researchers gain insight into the nonprofit sector and improving the efficiency of the sector itself.
- **Alternatives.** As an alternative to participation, you could choose to respond to interview questions in written format.

What if I want to stop participating in this research?

Taking part in this research study is your decision. Your participation in this study is voluntary. You do not have to take part in this study, but if you do, you can stop at any time. You have the right to choose not to participate in any study activity or completely withdraw from continued participation at any point in this study without penalty or loss of benefits to which you are otherwise entitled. Your decision whether or not to participate will not affect your relationship with the researchers or the University of Oregon.

Will I be paid for participating in this research?

You will not be paid for taking part in this research.

An Institutional Review Board (“IRB”) is overseeing this research. An IRB is a group of people who perform independent review of research studies to ensure the rights and welfare of participants are protected. UO Research Compliance Services is the office that supports the IRB. If you have questions about your rights or wish to speak with someone other than the research team, you may contact:

Research Compliance Services
5237 University of Oregon
Eugene, OR 97403-5237
(541) 346-2510, ResearchCompliance@uoregon.edu

STATEMENT OF CONSENT

I have had the opportunity to read and consider the information in this form. I have asked any questions necessary to make a decision about my participation.

I understand that I can ask additional questions throughout my participation. I understand that by signing below, I volunteer to participate in this research. I understand that I am not waiving any legal rights. I have been provided with a copy of this consent form. I understand that if my ability to consent or assent for myself changes, either I or my legal representative may be asked to re-consent prior to my continued participation in this study.

Please ask questions about any of the information you do not understand before you decide whether to participate. Is it ok for me to record this conversation?

As described above, you will be audio recorded while performing the activities described above. Recordings will be used for data analysis only.

- Initial the space below if you consent to the use of audio as described.

___ I agree to the use of audio recording.

Name of Adult Participant

Signature of Adult Participant

Date

Researcher Signature (to be completed at time of informed consent)

I have explained the research to the participant and answered all of his/her questions. I believe that he/she understands the information described in this consent form and freely consents to participate.

Name of Research Team Member

Signature of Research Team Member

Date

Sample Interview Questions

- How long have you worked at (organization)?
- What is your position? What are your responsibilities?
- How does (organization) contribute to the community? What role does it play as a part of the community?
- How do you define organizational impact? What type of impact does (organization) have in the community?
- How does the government contribute to the community on issues in education? What role does it have in the community? How would you describe their impact?
- Can you describe your relationship with government agencies?
- If you partner with government agencies, how does that collaboration function? Would you describe that as successful or challenging?

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