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4A – Reading and evaluating research

4B – Conducting research and

4C – Reporting and implementing research

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## CHAPTER 1

### INTRODUCTION

#### **Leadership and research**

Doing research was a very challenging task in the Ph.D. program at Andrews University. In my case, it was the first experience ever done. However, I developed the skills on leadership and research through my own study titled: Strengthening mission through strategy: An analysis of the Mission-driven Excellence (MdX) Strategy. Along with my professional life as a multicultural leader and experiences acquired living and working in three different countries (Brazil, United States, and Canada), I was accustomed only to read and evaluate reports. In fact, I had the skill to prepare a variety of reports by the time I used to work for the banks and CEOs for a car dealership.

As a requirement for the program, I had to read, learn, and invest plenty of time acquiring knowledge on how to conduct research added to reporting and implementing it. After an in-depth analysis of various methods and ways to do it, in my dissertation, I chose formative research methodology as a design and qualitative research to get the most valuable information throughout the qualitative tools. Thus, due to the ability to gather recommendations for improvement, the formative research methodology linked to the qualitative research method was the appropriate tool for the MdX Strategy. According to Creswell (2013b), the qualitative research method naturally collects various data, including but not limited to interviews, observations, and documents, and does not obtain

the data from a single source. The author also said that “we need a complex, detailed understanding of the issue,” that is established only by the time we directly talk to people (Creswell, 2013b, p. 48).

The formative research methodology is guided by three questions: “What methods worked well?” “What did not work well?” and “What improvements can be made to the theory?” (Reigeluth & Frick, 1999, p. 5). Because Reigeluth & Frick have developed a robust set of simple and yet powerful questions, I have selected this methodology as a theoretical framework to guide this study. This methodology chosen helped to achieve the purpose of this study that was to provide evidence for the value of the Mission-driven Excellence (MdX) Strategy, analyzing the strengths and weaknesses, and making suggestions for its improvement. Thus, gathering data from multiple sources, using formative research methodology, improves the quality of the data and facilitates triangulation in qualitative research (Patton, 2001). I will elaborate more regarding my experiences through my leadership and research through the sections and the artifacts along with the discussion in this paper. The artifacts represent a relevant part of this study that talks on leadership and research.

This reflection paper adopted these experiences showing many of my accomplishments in the leadership and research field. On the other hand, working on the research, it also allowed me to keep learning and growing in my leadership skills. For this reason, I have decided to cover all three competencies combined for this paper. The competencies combined are 4A – Reading and evaluating research, 4B – Conducting research, and 4C – Reporting and implementing research.

My reflection paper for these competencies is divided into four chapters. In Chapter 1, I discuss the official description followed by the personal narrative for the competency four families added to my background. In Chapter 2, I explore the knowledge base for this paper. This chapter examines reading and evaluating research describing some criteria for evaluating a research report. It includes the section conducting research and explores the steps I used to drive my study. It also has a section on reporting and implementing research. In Chapter 3, I consider my practical experiences showing the artifacts that contributed to developing them, and the last chapter, Chapter 4, confers the conclusion and final remarks for this paper.

### **Context**

#### Official Description

The Andrews University Leadership Department requires the students to apply “the integration of a knowledge base with practical experiences” (*Leadership Handbook*, 2014, p. 58) through a set of competencies. Graduate work in leadership requires “the development of research values, knowledge, and skills, and the integration of those abilities into leadership” (*Leadership Handbook*, 2011-12, p. 69). The fourth group of competencies, in this case, “leadership and research,” focuses “on the need to use data to communicate, persuade, and make decisions, and to contribute to the knowledge base for leadership organizational aspects of leadership” (p. 69). Predominantly, I believe that this group of competencies represent the technical step towards the dissertation of the leadership program. Not only because it needs to include qualitative and quantitative, but this skill is often required when engaging in organizational development, assessment and evaluation, and other leadership assignments.

Exploring these competencies, the first, 4a – reading and evaluating research, “leadership critiques the adequacy of research reports, conducts literature reviews using electronic sources, and relates research to the body of knowledge in their professional field” (*Leadership Handbook*, 2011-12, p. 69). The second competency, 4b – conducting research, “leadership understands the logic and processes of scientific inquiry, explains major research methodologies, formulates empirically-driven research problems, selects appropriate research designs, explains standards for data collection, and conducts basic data collection and analysis” (p. 69). In the last and final competency reviewed in this paper, 4c – reporting and implementing research, “leadership adequately communicates research findings and implements the findings in the workplace” (p. 69). In the end, the right development of these groups of competencies certainly brings success and satisfaction for the leaders and the organizations.

#### Personal Description and Exploring

Competency 4a – reading and evaluating research, it is essential to understand the steps involved when reading and evaluating research. It also is necessary to critique in ways that can contribute to a better understanding and, most importantly, how to use this knowledge in your field. As President of the company in Brazil, among my duties, I had to allocate material, human and financial resources to implement organizational policies and programs; establish economic, market, and administrative controls; formulate and approve promotional campaigns; and support overall human resources planning. Later, working on the MdX Strategy, one way or another, the evaluation popped out through its course. Only by these duties, I acquired considerable experience in what means to read and evaluate research, reports, or controls.

For competency 4b – conducting research. I understood that, as a leader, not only to evaluate research is essential, but I had to conduct research. The phenomenon – MdX Strategy was planned and created by the Office of Strategy and Research (OSR) for the Seventh-day Adventist (SDA) church in the North American Division (NAD). Mission-driven Excellence (MdX) is a strategy toward mission accomplishment. It is the most recent project focusing on the mission ever implemented by the NAD. The MdX resources are based on outstanding writings combined with extensive research findings. Regardless of being organized by NAD, MdX is the result of ideas from different sources such as church administrators from other SDA divisions, local administrators and pastors, church members, and in-depth research in the literature and spirit of prophecy. The MdX Strategy is the NAD's next step task force for mission accomplishment. It aims to guide the churches through strategic techniques and methods that expect to transform the church culture and the church habits in planning the church mission.

### **Background**

Originally from Brazil, I had the privilege to develop my experiences in three distinct areas: music, business, and church leader. All of these areas required strong leadership. In brief, in Brazil, I used to play for different audiences in many auditoriums in Southern Brazil. I also played for musical groups and choirs in many Seventh-Day Adventist Churches. I thoroughly enjoyed traveling, playing, and making new friends related to the music field. I also worked for several bank institutions and businesses. I received my educational graduation in Business Administration, followed by a Specialization in Finance and a Master's in Business Administration degree. After many years of working for different banks where Citibank was one of them, I left the bank to

pursue new leadership experience in another field. I was hired to work for the Montalve group. After acquired experiences in many areas over the years, I was nominated to be the CEO of Montalve's Group, a Volkswagen car dealership in Parana, south of Brazil.

As a result of an outstanding job as a team leader, in 1999, Montalve was chosen one of the best car dealerships in the Parana state and featured as a dealership model in the country. I migrated to the United States in September 2002. An immigrant can measure and understand the difficulties involved in relocating to a new and strange land. Each immigrant has personal experiences in how to assimilate the culture, language, communication, time zone, various challenging circumstances, and in the end, the American way of life. In North America, I am the founder, director, and music teacher for Avivar Music Learning Center, in Danbury, CT. This area brought me the chance to teach music and allowed me to train, build teams, and extend my knowledge. I was able to lead, promote, manage, and develop my business.

With expertise in three specific areas being: 1) leading companies and serving people using the knowledge acquired from my degrees, as well as skills gained through my previous job experiences in Brazil, Canada, and the United States, 2) Working in the music field as a pianist, music director, and conductor, teacher, and music school director, and 3) I developed my third area in the Seventh-day Adventist (SDA) church. From April 2004 to June 2012, I held the position as assistant pastor, first elder, church leader, and music minister for the Westchester Luzo-Brazilian Church in Mount Vernon, New York, a church that belongs to the Greater New York Conference (GNYC) of the Seventh-day Adventist (SDA) Church.

Starting from June 2012 until November 2016, I lived, studied, and worked in Canada, returning to the U.S. in December 2016, where I have been living since that. While working as the director and music teacher for a music school, I am also pursuing a degree at Andrews University in the Ph. D. in Leadership. Life as an immigrant is still a learning process. It seems that it never ends. There are still many challenges as well as opportunities to pursue in this life experience.

These career experiences were vital to growing my knowledge and expertise in many areas; however, none was connected to leadership and research. Thus, to complete the Ph.D. program, I had to invest time and effort in doing that. Regardless of the knowledge and skills acquired, what I bring to my daily life is the awareness that I have to learn how to become a better leader and create ways to be more effective in my leadership. This consciousness is based on what I have learned practically and, in some instances, theoretically in leading and directing the work of organizations in three different countries. Also, my consciousness expanded by the time I had to assimilate the tasks for leadership and research. These combined experiences were essential as they have contributed to my personal and professional growth and developed my skills and abilities as a leader. In the next chapter, I will explore some knowledge base that helped me to grow and understand more on this topic – leadership and research.

## CHAPTER 2

### KNOWLEDGE BASE

#### **Reading and evaluating research**

This chapter discusses the knowledge base definitions that added more significance to a better understanding of my leadership and research skills. It also showed me that, after I have finished my dissertation, I am a competent researcher. Along the process, I used both paper and electronic resources to find useful articles, read them critically and asked relevant questions concerning essential aspects of my project. I was also able to refine my skills in budgeting, P&L management, market analysis, operational efficiency, and business growth in reading and evaluating research and to apply these competencies in the analysis of a report.

Research skills are demonstrated through research projects, one of which is the precursor to my dissertation. Thus, understanding and evaluating research is also an essential skill that leaders must include in their roles. The reason is not to depend upon someone's else opinion or receive the report translated, but the leader has to have the expertise to read and evaluate themselves. The research findings now "make it almost unquestionable that if organizations want to succeed, they must have competent, skillful managers" (Whetten & Cameron, 2011, p. 6). In other words, one of the skills that are required from the leaders is the ability to read and evaluate reports. Leadership critiques

the adequacy of research reports, conducts literature reviews using electronic sources, and relates research to the body of knowledge in their professional field.

The premise is that no reputable Ph.D. would be complete without skills in research. The question is not whether you are smart enough, even if you do not understand all the words: reading research papers is not a talent; it is a skill. It is a skill that lots of leaders never learn. Research papers get more comfortable to read with practice, but it doesn't come without work. In my experiences working as a businessman, leader, and manager in various areas, I have been working and learning day-by-day with the research papers. As they reflect on how the results of experiments are presented, we must know how to comprehend and evaluate these primary sources.

Research “culminates in a report in different forms” (Creswell, 2013a, p. 265). According to Wickham and Wilcock (2012), a “report provides a tangible, accessible, and permanent communication of the findings [...] it need not be a long document. What it should be is a succinct and impactful presentation of the opportunity you have discovered for the business” (p. 274). The authors still pointed out that it should be a call to action that contemplates steps such as

1. Executive summary (includes the findings – it sells the report to the reader, so it is the most crucial part of the report),
2. Introduction (the context of the report),
3. The body of the report (space to report, explore, and expand the ideas),
4. Summary and recommendations (succinct enough closing the report with a final call to action), and

5. Appendices (the information used along with the report) (Wickham & Wilcock, 2012).

Fundamentally, the report represents the efforts toward the goal that is intended to be the call for action, and so, there is time invested in its planning and preparation. In presenting the report, visual materials also help the presentation. This tool provokes more impact, and besides that, reinforces the essential ideas already stated in the physical description. So, reading and evaluating reports and researches are useful tools that a leader must accomplish. All this information described referring to the different ways that I, as a researcher, understood how to read and evaluate reports written by myself or others. In the next section, I explore how to conduct research, and I use my own experience in doing that practicing throughout my dissertation.

#### Criteria for evaluating a research report

The basic is that: the criteria for evaluating the quality of the study are upon the evaluator. Evaluators may be different people coming from various fields and with diverse interest in the report. As an example, the evaluators may be faculty, journal editors and reviewers, policymakers and practicing educators, and a conference paper, reviewers (Creswell, 2013a). When reading and evaluating a qualitative or quantitative study, the evaluators look for different characteristics. A bit more specific on these two kinds of research, the qualitative researchers give value to the data collection followed by the persuasiveness of the study together with the self-awareness of the researcher. On the other hand, quantitative researchers are concerned about the data collection, analysis, and reporting results (Creswell, 2013a).

## **Conducting research**

Leaders understand not only the logic, the processes of the data collection but the interpretation and analysis. As a learner in reading and evaluating research, now is time to conduct research. Thus, primary research involves collecting data about a given subject directly from the real world. This section includes information on what primary research is, how to get started, ethics involved with primary research, and different types of research. It contains details about interviews, surveys, observations, and analysis. While researching a topic, I also read other sources to complete the topics of my research.

There are many ways to discuss the process of conducting research. For this paper, I conducted research using a qualitative method approach. Research is a “process in which you engage in a small set of logical steps” (Creswell, 2013a, p. 2). In this part, I showed my experience through the steps I followed in conducting research, and I highlight the rationale I used in writing chapter 3 of my dissertation. Thus, the study focused on giving feedback to the Office of Strategy and Research (OSR) for the Seventh-day Adventist (SDA) church in the North American Division (NAD) by analyzing the strengths and weaknesses and making suggestions for improvement on the Mission-driven Excellence (MdX) strategy.

The study employed a research method known as the formative research methodology. The formative research methodology is “a kind of developmental research or action research that is intended to improve design theory for designing instructional practices or processes” (Reigeluth & Frick, 1999, p. 1). Mission-driven excellence (MdX) is a “strategic process, rather than a program, that can flexibly accommodate a variety of tools, resources, and approaches for advancing mission” (North American Division of

Seventh-day, 2018b, p. 8). Formative research involves collecting useful data for the implementation and improvement of a project (Gittelsohn et al., 2006).

This formative research methodology can use both qualitative and quantitative research methods. However, Reigeluth and Frick (1999) gave preference to the use of qualitative research methods for formative research rejecting quantitative research methods such as surveys, experiments, correlational analyzes, claiming that they “are not particularly useful for improving instructional-design theory, especially in the early stages of development” (p. 2). Thus, due to the ability to gather recommendations for improvement, the formative research methodology linked to the qualitative research method was the appropriate tool for the MdX.

In this section, after presenting the purpose of the study and the study research questions, I introduced the rationale for the formative research methodology and research design. Next, I explored the research sample describing the selected participants together with the role of the researcher. Furthermore, I described the data collection in all its phases. The final section included a description of the data analysis, methodological issues for the chosen formative research methodology with some ethical considerations, limitations, and a brief chapter summary.

### Purpose of the Study

The purpose of this study is to better understand how the NAD participants in the pilot churches perceived the Mission-driven Excellence (MdX) Strategy and how it could be improved.

## Research Questions

These are the three study research questions:

1. What did the participants testing the MdX find most valuable about the strategy?
2. What did the participants testing the MdX identify as challenges or difficulties with the strategy?
3. What did the participants testing the MdX suggest as improvements to the strategy?

## The Rationale for the Formative Research Methodology

This study described how the formative research methodology, usually used to improve theory, was used to improve the Mission-driven Excellence (MdX). Formative research, “which is qualitative in nature” (Chen, 2007, p. 149), has a goal to improve a design process, justifying the formative research as a qualitative method claiming that quantitative research methods are not useful when trying to enhance instructional-design theory (IDT), especially at the beginning of its development stages (van den Akker, 1999).

Formative research is guided by three questions: “What methods worked well?” “What did not work well?” and “What improvements can be made to the theory?” (Reigeluth & Frick, 1999, p. 5). These three guiding research questions were reflected in the study research questions. The formative research methodology is an emergent method that has been used in many areas such as in Smart Schools as “Theory One” (Reigeluth, 1999), a design theory to facilitate systemic change in public school districts (Doblar, 2010; Joseph, 2003), an Instructional-Design Theory (IDT) for fostering self-efficacy

through gamification in a Midwest university (Zurek, 2017), and an instructional design model for the design of computer simulation for teaching statistical concepts (Hsu, 2009), among many others.

### **Study Design**

To meet the purpose and answer the research questions, this study was conducted as a qualitative research method using a formative research methodology. The formative research methodology helped to gain feedback on the strengths and weaknesses of the Mission-driven Excellence (MdX), suggesting ways to improve the theory. Along with the decision on the study design, the collection and interpretation of data also determined the research success.

The population for this research was pastors and churches involved in the MdX implementation as pilot churches in the North American Division (NAD). The data were collected from multiple data sources, such as interviews, surveys, observation, and document analysis. The documents were several emails received as updates from the churches working towards the MdX implementation. The participants contributed to answering the research questions, describing their perceptions, and giving a better understanding of the MdX and a sum of ideas needed for its improvement. After all the material gathered during this study, the information was transcribed, organized, and coded using Dedoose, a qualitative analysis software. Themes and patterns were searched to identify and address them into categories of strengths and weaknesses that helped focus the findings in alignment with the research questions and the purpose of the study.

## Formative Research Methodology

This study used formative research methodology towards the Mission-driven Excellence (MdX) seeking to improve the theory. MdX is a combination of processes working as a strategy towards mission accomplishment. The formative research methodology is “a kind of developmental research or action research that is intended to improve design theory for designing instructional practices or process” (Frick & Reigeluth, 1999, p. 1). According to Kim (2016), design theory is

A kind of knowledge that identifies the best available methods for accomplishing given goals within given situations, and formative research uses an iterative process of implementing and improving interventions in collaboration with practitioners, thereby making it possible to improve the design theories in the field. (p. 29)

More specifically, formative research is a methodology used for developing studies with the intention to improve a design theory or “develop a new grounded theory for designing instructional practices or process” (p. 30).

The formative research methodology is a method that has been used in many situations such as in Smart Schools as “Theory One” (Reigeluth, 1999), a design theory to facilitate systemic change in public school districts (Doblar, 2010; Joseph, 2003), an Instructional-Design Theory (IDT) for fostering self-efficacy through gamification in a Midwest university (Zurek, 2017), an instructional design model for the design of computer simulation for teaching statistical concepts (Hsu, 2009), as a tool to develop a healthy eating social marketing campaign for low-income families (Mathews, 2017), to improve another existing IDT (Antwi, 2017), to launch a national sanitation campaign in Tanzania (Czerniewska, Muangi, Aunger, Massa, & Curtis, 2019), as an educational design theory for the theory development of an Adventist learning environment design process (Siebold, 2000), among many others. For this study, as a formative research

methodology is a tested and efficient method used in various situations, as seen above; accordingly, it was chosen as a methodology for the MdX.

### **The rationale for Utilizing Qualitative Method**

Formative research methodology can technically use both qualitative and quantitative research methods. However, Reigeluth and Frick (1999) give preference to the use of qualitative research methods for formative research rejecting quantitative research methods such as surveys, experiments, correlational analyzes, claiming that they “are not particularly useful for improving instructional-design theory, especially in the early stages of development” (p. 2). Formative research, “which is qualitative in nature” (Chen, 2007, p. 149), has a goal to improve a design process, justifying the formative research as a qualitative method claiming that quantitative research methods are not useful when trying to enhance instructional-design theory (IDT), especially at the beginning of its development stages (van den Akker, 1999). Gathering data from multiple sources, using formative research methodology, improves the quality of the data and facilitates the process of triangulation in qualitative research (Patton, 2001).

As cited in Kim (2016), Merriam (2009) identified four characteristics to understand the nature of qualitative research:

1. Qualitative research focuses on the meaning, process, and understanding: How people interpret their experiences, construct their worlds, and the meaning connected to their experiences (Kim, 2016, p. 28).

2. Researchers are the primary instrument for data collections and analysis: with the goal of understanding, the human instrument is the ideal pathway to collect and

analyze data. Not less important, it is vital to monitor the biases when in the process of collecting and interpreting the data (Kim, 2016, p. 29).

3. The process is inductive: “researchers gather data to build concepts, hypotheses, or theories, rather than deductively testing hypotheses as in quantitative research (Kim, 2016, p. 29).

4. The findings require detailed description: instead of numbers, words, and pictures, they help to learn on the phenomenon (Kim, 2016, p. 29).

This study conveyed all four characteristics. Thus, according to the purpose of the study, and due to its nature of gathering recommendations for improvement, qualitative research combined with the formative research methodology was essential for this study.

#### Formative Research Format

Formative research is guided by three questions: “What methods worked well?” “What did not work well?” and “What improvements can be made to the theory?” (Reigeluth & Frick, 1999, p. 5). These three guiding research questions were reflected in the research questions for this study. Formative research also shares similarities with case study research. Both methods rely on the researcher’s influence on the situation. As cited in Zurek (2017, p. 74), “a case study focuses on a single instance or example to test or investigate a research question” (Creswell, 2007). Creswell (2013b) defined case study research as:

A qualitative approach in which the investigator explores a real-life, contemporary bounded system (a case) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving multiple sources (i.e., observations, interviews, audiovisual material, and documents and reports) and reports a case description and case themes. (p. 97)

Accordingly, case studies can be classified as designed case or naturalistic cases for both improving an existing theory or developing a new theory (Reigeluth & Frick, 1999). A designed case denotes “an instance that was created using the design theory, while a naturalistic case refers to an instance that was not designed according to the design theory but has many features in common” (Kim, 2016, p. 30). A designed case intentionally ties the researcher to apply the theory and then evaluate its application. Besides, there are naturalistic cases (in vivo and post facto). It can be “in vivo” if the evaluation is done during its implementation, and “post facto” if the review is done after its implementation (Reigeluth & Frick, 1999). See Table 2.

Table 2

*Kinds of Formative Research Studies*

	For an Existing Theory	For a New Theory
Designed case	A designed case for an existing theory	A designed case for a new theory
<i>In vivo</i> naturalistic case	<i>In vivo</i> naturalistic case for an existing theory	<i>In vivo</i> naturalistic case for a new theory
<i>Post facto</i> naturalistic case	<i>Post facto</i> naturalistic case for an existing theory	<i>Post facto</i> naturalistic case for a new theory

*Source:* (Reigeluth & Frick, 1999)

In naturalistic cases, the researcher can not manipulate in any way the situation under investigation. When the investigation is for improving an existing theory, the researcher analyzes the cases to determine if the ways have been consistent with a theory, what are the guidelines they fail to implement as well as what valuable elements they

have that are not present in theory. Additionally, a naturalistic case study formatively seeks to evaluate the cases looking for how each element identified might be improved.

This study was an *in vivo* naturalistic case to pursue the purpose of this study, which is to better understand how the NAD participants in the pilot churches perceived the Mission-driven Excellence (MdX) Strategy and how it could be improved. The investigation took place while the implementation was being done. This method was used for improving an existing theory. Thus, the MdX is a strategy that fits under theory, and the *in vivo* naturalistic case was more appropriate.

### Theoretical Framework

The formative research is guided by three questions: “What methods worked well?” “What did not work well?” and “What improvements can be made to the theory?” (Reigeluth & Frick, 1999, p. 5). These three guiding research questions were reflected in the research questions for this study. The rationale for this theoretical framework resided on the fact that based on Reigeluth & Frick’s interpretation of this methodology, the guiding research questions were a robust way of uncovering strengths and weaknesses and further developing the theory along with a robust qualitative method approach. Also, the logic underlying the formative research is that, if you “create an accurate application of a model, then any weaknesses that are found in the application may reflect weaknesses in the theory, and any improvements identified for the application may reflect ways to improve the theory” (Reigeluth & Frick, 1999, p. 4). Moreover, as stated by the authors, “the methodology has proven valuable for identifying ways to improve [many] theories and models, and it could also be used to improve theories and models in virtually all fields of education” (Reigeluth & Frick, 1999, p. 5). Thus, the three guiding questions

given by this theoretical framework have guided the outcome of my research questions. Moreover, the three questions fit very well with the purpose of this study.

### Study Procedures

Reigeluth and Frick (1999) recommend four procedures for conducting formative research:

1. Select a design theory (strategy).
2. Select a case.
3. Collect and analyze formative data on the case.
4. Offer tentative revisions for the theory (strategy).

The detailed application of these steps connecting them to the MdX Strategy is explained in the next section.

Four steps were followed to use the formative research methodology, as described by Reigeluth and Frick's (1999). They were adapted to the goal of obtaining feedback from the participants and improving the Mission-driven Excellence (MdX) Strategy. I have adjusted the wording of the research process steps to what was done in this study (e.g., improving a strategy, not just a theory because MdX Strategy is also a theory).

#### **1. Select a Design Theory**

The designed theory selected for this dissertation was the MdX Strategy, which was also the phenomenon for this study. This study was the first and formal complete evaluation of the MdX Strategy.

## **2. Select a case**

The case was the Mission-driven Excellence (MdX) Strategy implementation in the pilot churches. The pilot churches launched the MdX Strategy, which consists of a series of habits implementation-defined by the strategy. It begins with Habit 1: Taking Inventory up to Habit 10: Becoming a model. The Mission-driven Excellence (MdX) Inventory is “an informal self-rating of your church’s strategic preparedness on the 10 Habits that make up of a Mission-driven Church” (North American Division of Seventh-day, 2018a, p. 8). Refer to Appendix B for the MdX Inventory.

## **3. Collect and Analyze Formative Data on the case**

As the case is the Mission-driven Excellence (MdX) Strategy implementation in the pilot churches, participants using the strategy were less willing to share their true feelings when asked for feedback. The North American Division (NAD) had preliminary feedback that demonstrated the church’s acquaintance throughout the implementation and the area that needs to be improved in the strategy. However, more analysis of the strategy was needed. Thus, the purpose of this study was to better understand how the NAD participants in the pilot churches perceived the Mission-driven Excellence (MdX) Strategy and how it could be improved. This purpose also involved getting positive and negative feedback, and gathering suggestions for improvements from the participants involved in the project, analyzing and collecting data throughout the MdX Strategy implementation.

## **4. Offer Tentative Revisions for the Theory**

This study was the first in-depth analysis ever done on the Mission-driven Excellence (MdX) Strategy. The findings were used to suggest improvements to the

theory, accordingly, to the MdX Strategy. Nonetheless, until NAD reaches complete knowledge, enhancement, and full validation of the MdX Strategy, more studies on the project may be needed in the future.

### Research Sample – Selecting Participants

The population for this research was the 67 pilot churches involved with the Mission-driven Excellence (MdX) Strategy implementation in the North American Division (NAD). A population “is a group of individuals who have the same characteristic” (Creswell, 2013a, p. 142). Describing a sample, Creswell (2013a) stated that “a target population or sampling frame is a group of individuals with some common defining characteristic that the researcher can identify and study” (p. 142).

A purposeful sampling process was used to select the research sample. The determination of the participants – in qualitative research – is a purposive sampling (Patton, 2001). The reasoning of purposeful sampling lies in “selecting information-rich cases, intending to yield insight and understanding of the phenomenon under investigation” (Bloomberg & Volpe, 2012, p. 104). From the 67 pilot churches primarily working on the MdX Strategy in the United States and Canada, eleven churches from the Ontario Conference in Canada appeared to be more advanced in this MdX Strategy implementation. Out of the eleven churches, ten responded to my initial call. Thus, I had initial phone call conversations with their pastors to receive an update regarding the MdX Strategy implementation. Out of ten that responded, six indicated a clear enough knowledge that they were actively using the MdX Strategy. Three were in some sort of decision stage, and one church ignored further attempts to connect and participate in this study. Thus, the research sample for this study was six churches coming from the 11 pilot

churches located in Canada. Therefore, this study is not going to focus on those churches on the decision stage. Thus, this study is going to focus on those six churches, with I pursued initial conversation followed by a more in-depth discussion with those actively implementing the MdX Strategy. So, this study is about six churches.

### Data Collection

The data collection focused on how to improve the Mission-driven Excellence (MdX) Strategy, looking for its strengths (what should not be changed), and at the same time, looking for its weaknesses (what should be changed), plus the improvements needed (Hsu, 2009; Reigeluth & Frick, 1999). Nonetheless, as important as to analyze the strengths, it was also essential to give attention to the criticism of the weaknesses part of the strategy, searching for ways and ideas on how to improve each weakness (Reigeluth & Frick, 1999).

I selected six churches implementing the MdX Strategy in Canada. All the participants, including their pastors and church board members, were volunteers, and all the data collected confidential. I audio recorded all data collected through the interviews, typed, and transcribed them verbatim using appropriate software and stored directly on my computer, requiring a personal password to have access to it. All these data collections are securely stored until the study is completed, being wholly deleted after the study is done. Along with selecting the churches, there were some sub-questions that I, as a researcher, had to frame on to be more successful in the MdX Strategy implementation evaluation. The sub-questions were:

1. Who is the person that is driving the MdX Strategy implementation in the church?

2. How do I find out if the strategy was successfully implemented or not?
3. How do I find out what processes worked and did not work well, and what improvements can be made to the MdX Strategy?
4. Who are the best people to talk to, that I can get an excellent insight that will help answer the research questions?
5. Do I want to talk to people that have never read the materials, books, and the resources available?

Going through these questions, I selected six churches for a one-on-one pastor's interview and two focus groups coming from those six churches. The participants in the focus group were elders of the church board. The first focus-group had four participants, and the second, five participants. Due to the Covid-19 pandemic, a presential visit to those churches was not possible. Thus, I reached churches that really acquired extensive knowledge of all the processes in the MdX Strategy. These churches invested time in the implementation, so when they talked or made a critical remark on the MdX Strategy and its resources, I knew that came from a well-informed person. Also, they helped to clarify the purpose of this study as well as contributed to answering the study research questions.

The criteria for selecting the participants were as follows:

- A. All participants belonged to the Seventh-day Adventist church and were working as a pilot in this MdX Strategy implementation.
- B. All participants were the leaders in the implementation of the MdX Strategy. They were involved and committed to their church, and were willing to transform their churches from church A – busy, event-driven,

and barely known in their community, to church B – a mission-driven church with a passion for excellence.

- C. Mostly the participants took the time to inform themselves reading, examining, and understanding the MdX Strategy through at least one or more resources. The resources included the book *The Mission-Driven Church: Understanding the Power of Strategic Thinking and Deliberate Actions* by Dan Day, the book *Becoming a Mission-Driven Church* by Brantley, Jackson, and Cauley, and the Mission-driven Church kit tool that included the Pastor's Implementation Guide, the Presenter's Manual, the Participant's Manual and the USB drive with additional material in regarding the strategy plus the resources in the website [mdxsda.org](http://mdxsda.org).
- D. Mostly the participants were able to participate in the MdX Strategy initial training sections promoted by the Ontario Conference or their local churches,
- E. Mostly the participants participated in the spiritual retreats or spiritual journeys promoted by their local churches as part of the pre-events or processes of the MdX Strategy, and
- F. Mostly the participants received Dr. Paul Brantley's visit at some point before and during the implementation where he explained the MdX Strategy.

I followed a few steps to reach out to the churches and to proceed with the data collection:

1. I contacted the leader of the Ontario Conference to get permission to contact the churches and pastors implementing the MdX Strategy, suggesting that it could represent a significant part of what they were doing. The churches had to be active in promoting the MdX Strategy implementation coming from the conference office.

2. After the consent given, I contacted the Assistant to the President to obtain a list of the churches/pastors participating in this implementation. The Assistant sent me a list of eleven churches and their pastors already working on the MdX Strategy implementation.

3. I requested the Assistant to the President to send an email to the pastors introducing my name as a researcher for this study at the same time inviting them to participate in this study. Also, he asked for their update report regarding their MdX Strategy implementation. These documents also contributed to the data collection and further analysis.

4. I called the pastors to get their update and initial viewpoint on the MdX Strategy going through the implementation in their churches.

5. I sent the pastors a text message or an email with a thank you message for our first conversation and their updates on the MdX Strategy.

6. Due to the Covid-19, all travels were prohibited and canceled. So, I gave the pastors a call and requested their availability (day and time) to conduct an online interview. So, I called the six churches' pastors that were more advanced, working on strategy implementation.

7. I also asked the pastors working on the MdX Strategy implementation to talk to their church board members to get a list of people willing to participate in a focus group

interview voluntarily. Two pastors sent me a list of names and email addresses of the church board members.

8. I gave each church board member a call explaining the importance of this study for the Seventh-day Adventist (SDA) church, and how the study was going to work.

9. I sent an email to the six church pastors and the two church board members, with the Informed Consent Form, including the questions that would be discussed in our meeting. Refer to Appendix E: Informed Consent Form.

10. I received the requested forms filled out by the participants.

11. I conducted a one-on-one interview with six church pastors and two focus groups (four and five people, respectively). I also mentioned that I could reach them again to do a member checking at any time after the transcription was done.

12. I sent the participants a thank you email for their availability and time invested in participating in this study and making myself available for any further questions they may have.

#### Data Collection Methods

This study employed and interconnected several data collection methods allocated in different phases that helped to gain knowledge in this formative research methodology to improve the MdX Strategy. The data collection steps were:

1. Survey
2. Interview
3. Collecting: documents, materials, and audio recordings
4. Member checking
5. Observing

## 6. Feeling

The survey phase is recommended by (Bloomberg & Volpe, 2012). The interviewing and conversing is proposed by (Bloomberg & Volpe, 2012; Creswell, 2013a; Reigeluth & Frick, 1999; Yin, 2016). The observing and collecting documents and materials, and audio recordings are proposed by (Creswell, 2013a, Reigeluth & Frick, 1999; Yin, 2016), and the member checking phase by (Reigeluth & Frick, 1999).

### Phase I: Survey

I contacted the participants to do interviews for this study. The participants came from six different churches being six pastors as a one-on-one pastor's interview and two focus groups - one group with four and another with five participants. By the interview time, I asked all participants to complete and send back to me the Sample Survey for Demographic Data. Through this form, I was able to collect profile data and ask for their purposes in participating in this project. Refer to Appendix B for the demographic survey.

### Phase II: Interviews

I conducted semi-structured interviews with each participant to acquire a better understanding of their acquired experiences implementing the Mission-driven Excellence (MdX) Strategy. The purpose of including semi-structured interviews in qualitative research for data collection was to obtain resourceful information from the participants who have acquired experiences, viewpoints, ideas, and observations toward the strategy (DeJonckheere & Vaughn, 2019). Semi-structured interviews, according to Denzin and Lincoln (2018), are different from structured ones because:

Semi-structured interviews can make better use of the knowledge-producing potentials of dialogues by allowing much more leeway for following up on

whatever angles are deemed important by the interviewee, and the interviewer has a great chance of becoming visible as a knowledge-producing participant in the process itself, rather than hiding a preset interview guide,” allowing the interviewer to focus more on important things in relation to the study. (p. 579)

Furthermore, interviewing and conversing with the participants are the “most direct and useful way to collect formative data” (Hsu, 2009, p. 68). I started with broad questions and narrowed them down to be more fully understandable at a later step in the interview process (Williams, South, Yanchar, Wilson, & Allen, 2011). I audio recorded the participants’ answers and transcribed them verbatim. All in-person interviews were preferred; however, due to the Covid-19, I used phone/online interviews.

The types of interviews that I used in the MdX Strategy data collection are as follows:

#### 1. One-On-One

The one-on-one interview was used to collect information from the participants of the Mission-driven Excellence (MdX) Strategy. The one-on-one interview is a data collection procedure where conversation occurs with only one participant at a time (Creswell, 2013a). The goal was to generate an honest discussion that addressed the MdX Strategy implementation. This study had six pilot churches, so I selected the six pastors for a one-on-one interview. The interviews took about 25-60 minutes. Before the interview, I provided the pastors with the Interview Protocol (Appendix C), which contained the questions that guided the interview sessions. I audio recorded the answers and transcribed them for a better understanding of the data collected.

#### 2. Focus Group

I performed a phone/online focus group interview to collect information from the two pilot churches of the Mission-driven Excellence (MdX) Strategy. A focus group

interview is a process of collecting data where the conversation occurs with a group of people, usually four to six (Creswell, 2013a). Participation was voluntary, and the selection of the participants was based on the defined criteria established above. This study had two groups and lasted about 50 to 90 minutes. The group size was four participants in one group and five participants in the other group. I chose the participants to be in the focus group based on an initial conversation with the pilot church pastor as well as an overview of their contribution to the MdX Strategy implementation in their local churches. The reason for this choice was because, in some churches board, all the members were responsible for being aware of and acquired knowledge of the MdX Strategy as a whole. Before the interview, I provided the focus-group participants with the Interview Protocol, which contained the questions that guided the interview sessions. I audio recorded the interviews and transcribed them for a better understanding of the data collected. The goal was to generate an open and honest conversation that addressed the issues toward the MdX Strategy implementation.

Comparing a one-on-one interview to focus group interview, Patton (2001) indicates that:

In a focus group, participants get to hear each other's responses and to make additional comments beyond their own original responses as they hear what other people have to say. However, participants need to not agree with each other or reach any kind of consensus. Nor is it necessary for people to disagree. The object is to get high-quality data in a social context where people can consider their own views in the context of the views of others. (p. 386)

### 3. Interview Protocol and Questions

An interview protocol supported this method once it was developed to attend the purpose of this study. An interview protocol "is a form designed by the researcher that contains instructions for the process of the interview, the questions to be asked, and space

to take notes of responses from the interviewee” (Creswell, 2013a, p. 225). This protocol included the project name, time of interview, date, place, church name, interviewer, interviewee, and role/position. It also highlighted the basics of this interview with a brief description of the project followed by a set of questions to explore how they perceive the MdX Strategy looking for strengths, weaknesses, and collecting ideas for improvements. Through the set of questions, I answered back-and-forth to the research questions. Refer to the interview protocol and the set of questions in Appendix C.

#### Phase III: Collecting

I collected artifacts (documents and materials, and audio recordings) (Yin, 2016). I read all the materials, including the tool kit, books, reports, and the documents received via email from the pastors. I kept a journal during the data collection process and analyzed all MdX Strategy and its resources. Documents regarding the methods of instruction added to the outcomes helped in the judgment step, where the elements of the theory were evaluated (Reigeluth & Frick, 1999).

#### Audio Recording

I audio recorded the participants’ answers and transcribed them verbatim.

#### Phase IV: Member Checking

Member checking is “a process in which the researcher asks one or more participants in the study to check the accuracy of the account” (Creswell, 2013a, p. 259). It is a technique where the information given from the participants is checked in regarding its accuracy (Reigeluth & Frick, 1999). When needed, the participants included in the interview data collection were asked to confirm their responses through a process named as a member check. Through this process, the researcher correct errors and

misconceptions and then ask additional questions to clarify the information (Lee & Reigeluth, 2003). I performed the member check with most of the participants. In doing that, I reached a better understanding of the meanings of what they had said through the interview. I, as a researcher, transcribed the interviews and asked the participants to check the accuracy of the information given.

#### Phase V: Observing

I made observations and notes at the call/online conversations and interviews that helped to see and understand if the churches followed the pre-events or processes (setting the stage) and followed the steps according to the MdX Strategy implementation. Observation is a practice of collecting an open-ended and firsthand data only by observing the participants and places at a research site (Creswell, 2013a). Observing, notes Yin (2016):

Can be an invaluable way of collecting data because what you see with your own eyes and perceive with your own senses is not filtered by what others might have reported to you or what the author of some document might have seen, so they are a form of primary data, to be highly cherished. (p. 150)

Observation sits upon some clarifications and interpretations as an attempt to answer questions such as to what, who, and when? As well as why or how? As a researcher, I observed the responses of the interviewees, including the pastors in the one-on-one and the church board members on the focus group. During this observation, I looked for how they answered the questions and how they interacted and interrelated with each other going through the answers.

#### Phase VI: Feeling

Feelings can cover an essential part of the research. Yin (2016) referred to feeling as a “form of data that goes well beyond the effects accompanying your sense of touch,”

and is something that covers “a variety of traits within yourself that are potentially important to the study and that you should not ignore” (p. 157). Feelings can represent precise data regarding the environment, people, and the situation (Yin, 2016). So, going through the interviews, I wrote down my feelings with notes on how, when, and why they happened.

### Data Analysis

I identified themes and patterns, classifying them on strengths and weaknesses that would help to understand better how the participants in the North American Division (NAD) pilot churches perceived the Mission-driven Excellence (MdX) Strategy implementation and how it could be improved. The qualitative method requires quality in the data collection, which “much effort in case study analysis is devoted to interpreting data” (Schankman, 2006, p. 82). Qualitative data analysis “is the process of bringing order, structure, and meaning to the masses of data collected” (Bloomberg & Volpe, 2012, p. 135).

Data analysis occurred in three phases. The first phase: I gathered all the information, organized and transcribed verbatim using the Express Scribe software, with the exact wording including “aspects of nonverbal communication such as laughter, pauses, or interruptions” (Bloomberg & Volpe, 2012, p. 136). I also typed and securely stored the data on my computer in well-labeled computer files. In the second phase, for academic analyzes, I uploaded the data into the Dedoose software for coding and analyzing the data by codes and sub-codes. As already mentioned, Dedoose software helps the coding process, stores and organizes, categorizes and analyzes, visualizes, and discovers data allowing more efficient work. In the third and last phase, as proposed by

Creswell (2013a), to increase the thoroughness and credibility of this formative research, I ran the data through triangulation and member check processes.

### Methodological Issues

Reigeluth and Frick (1999) addressed three methodological issues in working with a formative research methodology, and other case-study scholars also reaffirmed them. The three issues addressed are: construct validity, sound data collection and analysis procedures, and transferability/generalizability of the study. Each of them is discussed in the following sections:

#### Construct Validity

Many authors addressed directly or indirectly on construct validity. Validation, according to Angen (2000), is “a judgment of the trustworthiness or goodness of a piece of research” (p. 387). Furthermore, construct validity, explained Yin (2009), is “identifying correct operational measures for the concepts studied” (p. 40). The criterion of credibility implies that the findings have credibility because the data is precise and reaches the researcher, participants, and readers with the same level of information and interpretation (Bloomberg & Volpe, 2012). All investigation carries the obligation of persuading oneself and one’s audience that the discoveries are based on critical examination (Rudestam & Newton, 2007). Reigeluth and Frick (1999) suggested various techniques that can enhance credibility: A. triangulation by (Lincoln & Guba, 1985), B. chain of evidence by (Guba & Lincoln, 1981), C. member check by (Guba & Lincoln, 1981), and D. clarification of the researcher’s assumptions, biases, and theoretical orientation by (Merriam, 1988).

### A. Triangulation

Triangulation is known as gathering data from multiple and different sources as “a means of cross-checking and corroborating evidence and illuminating a theme or theory” (Rudestam & Newton, 2007, p. 114), comparing one information with one another (Weigley, 2016). I used multiple sources, such as material and document analysis, audio recorder, one-on-one interviews, and focus group interviews. Additionally, in combining these sources to corroborate evidence, the data collection was done at various points in time (Zurek, 2017). All of these methods combined helped to reach the triangulation.

### B. Chain of Evidence

It explained how the data was collected and analyzed (Bloomberg & Volpe, 2012; Weigley, 2016). According to Yin (1984), the study ought to be performed as if somebody is looking over the shoulder of the researcher, as cited in (Reigeluth & Frick, 1999). Bloomberg and Volpe (2012, pp. 109-110) elaborated on this, explaining that this technique “would include details such as how codes were developed and applied to the data [...] methods used to address coding reliability and assess intercoder agreement (many coders involved).” I performed interviews with the six churches and their pastors in a one-on-one conversation and two focus groups with four and five participants each. I audio recorded the interviews and transcribed them verbatim. I used the Dedoose software to organize codes and sub-codes. After the Dedoose work, I analyzed and separated them to write the rationale for the results, followed by the conclusion.

### C. Member check

See it on member checking above (Phase IV)

#### D. Researcher's Assumption

Another unique technique that helped in the credibility was analyzing the data and findings with other professionals, which would confirm that all data collected from the participants were satisfactorily reflected in the conclusions (Bloomberg & Volpe, 2012). Present oneself as a researcher, and clarify up at the beginning the personal understandings and biases that you bring to the research (Bloomberg & Volpe, 2012; Weigley, 2016). In this study, the Office of Strategy and Research (OSR) at the North America Division (NAD) did plan and analyze in detail the one-by-one of the ten habits and how they should be implemented. For the last plus five years, the OSR studied, planned, and developed ways to apply and implement the MdX Strategy towards mission effectiveness, turning the NAD churches as mission-driven churches.

#### Sound Data Collection and Analysis Procedures

Sound data collection and analysis procedures receive the impact on two major factors: 1. the completeness of the data (thoroughness), and 2. the accuracy of the data (credibility) (Reigeluth & Frick, 1999). The former, as presented by Reigeluth and Frick (1999), advocated for several technics that include: preparation of participants in advance, an emergent data collection process, gradually lessening obtrusive, iteration until reach saturation, and increase the method based on its strengths and weakness. The latter was improved through a series of different techniques that included: triangulation, chain of evidence, and member checks (Reigeluth & Frick, 1999), as explained above.

#### Transferability/Generalizability of the Theory

I searched for an accurate and large number of descriptions for the instance (Yin, 2009), so the transferability/generalizability to the theory was possible. I also explored

situations every time the results appear differently in the round. As cited in Kim (2016, p. 51), “transferability refers to the degree to which the results of qualitative research can be transferred or applied to other situations” (Lincoln & Guba, 1985). For the reader, the generalizations were based on the amount of information received through the study where the findings can be applied to his or her context. Accuracy within formative research was expanded by improving how the results can be generalized to the theory (Reigeluth & Frick, 1999). Two significant strategies helped to attend this generalizability to the method: A. recognizing situationally, and B. replication the study

#### A. Recognizing Situationality

To investigate the situationally, Reigeluth and Frick (1999), affirmed that it could be done in at least two ways: 1. At whatever point, you discover different outcomes in different rounds (iterations), seek differences in the situation. This study consisted of one round of data collection covering the MdX Strategy in two steps of its implementation: interactive data collection (during its application) and non-interactive (after its application). Thus, only one round of data collection was done at this time; however, the Office of Strategy and Research (OSR) for the Seventh-day Adventist (SDA) church in the North American Division (NAD) could be fascinated by conducting further research, and 2. Intentionally shift components of the situation in your rounds of data collection to examine if the results, by chance, are going to diverge. Once NAD conducts further research, this way will be possible. Moreover, “at a very minimum, your research report should describe as completely as possible the situations under which the theory was applied in your study, so that others may draw conclusions about situations” (Reigeluth &

Frick, 1999, p. 22). Accordingly, I provided a detailed description of the steps taken that helped to reach a complete understanding of the MdX Strategy implementation

### B. Replication of the Study

Replication is required to strengthen the findings of the formative research methodology [towards the MdX Strategy] (Reigeluth & Frick, 1999; Zurek, 2017). This MdX Strategy was unique and innovative and represented the first formal and complete evaluation of this strategy made by the Office of Strategy and Research (OSR) for the Seventh-day Adventist (SDA) church in the North American Division (NAD). Therefore, only in front of sufficient replication is that the theory and its improvements gain enough evidence to demand [additional] changes in the strategy (Reigeluth & Frick, 1999). Due to time constraints and Covid-19, it was not done at this moment. So, it may require replication in the future.

### The Role of the Researcher

This study claimed to be an essential study for the Seventh-day Adventist (SDA) Church because it gave to the Office of Strategy and Research (OSR) at the North America Division (NAD) directions on these processes in how to be more effective towards mission accomplishment implementing the MdX Strategy. As the researcher in this study, my role was to understand the Mission-driven Excellence (MdX) Strategy and its resources and to evaluate the MdX Strategy implementation in the pilot churches in the Ontario Conference, Canada. I collected data, explored resources, and interviewed participants. I expected to discover strengths and weaknesses, anticipating challenges that could be used to improve the MdX. Creswell (2013b) clarified that “they do not use or rely on questionnaires or instruments developed by other researchers” (p. 45) since the

researcher's suppositions and convictions can impact how the data is collected and analyzed (Antwi, 2017).

I hold a Bachelor's Degree in Business Administration, a Specialization degree in Finances, a Master's Degree in Business Administration, and a Canadian Business for Internationally Educated Professionals Certificate at York University in Canada. I am also an accomplished musician and an experienced assistant pastor and first elder, who contributed to multicultural Seventh-day Adventist (SDA) churches in the USA and Canada. As a leader and educator, I have acquired multicultural experiences planning and implementing leadership strategies in different companies and churches in Brazil, the United States, and Canada. My interest in this study resonated with the desire to have a refined, focused, practical, and committed mission-driven church. The kind of church that would work to accomplish the mission following steps or processes like was presented on the MdX Strategy.

#### Limitations of the Study

The current study had few limitations due to the biases, understandings, and perceptions of the participants when describing their identification with the MdX strategy and their experiences implementing the strategy. As a researcher for this study, I assumed that the pastors and church board members had taken part in all the processes throughout the MdX Strategy implementation. However, given the duties and demands related to their positions, there was a chance that some pastors and church board members did not have fully participated in pieces of training or not fully informed themselves in the MdX Strategy implementation. Therefore, I still had to be dependant on their judgment, even

though they may not be the ideal informant. In this happening, I worked wherever the situation was.

Also, this study was limited to:

A) the study was limited to the Seventy-day Adventist (SDA) churches in the North American Division (NAD) territory,

B) this study focused on the MdX Strategy implementation conducting a formative research methodology. The researcher collected qualitative data on the NAD pilot churches participating in this project,

C) conclusions drawn from this study cannot be generalized to other NAD churches or SDA divisions,

#### Ethics – IRB Approval

Creswell (2013a) stated that “in all steps of the research process, you need to engage in ethical practices” (p. 23). This research involved human participants. Therefore, I had to ponder ethical issues to protect and preserve the participant’s privacy, the information gathered, and take some research precautions throughout the study. The protection of both the respondents and the information [was] the responsibility of the researcher (Bloomberg & Volpe, 2012).

First, I submitted this study to the Institutional Review Board (IRB) at Andrews University. To approach the participants and to have access to their sites, there was permission to be formally requested from a human subjects review board, a campus committee that reviews the research study avoiding potential harmful impact on and threats to the participants (Creswell, 2013b). I defended this proposal to the dissertation committee and then submitted to the IRB for approval following its guidelines. This

proposal included a summary of the context, problem statement, purpose of the study, and research questions. I also gave all the background for this study through a complete literature review; and the proposed methodology. The IRB approval letter allowed me to move forward with the study and collect data. Refer to Appendix D.

Second, I explained to the participants that as a researcher, I had to “protect the anonymity of the informants” (Creswell, 2013b, p. 174). I assured them that their voluntary cooperation was essential to the study. I explained the purpose and how we would work going through this data collection process. Ethical considerations also included the “expectation of confidentiality” (Bayer, 2017, p. 75), which means that I treated all the information respectfully and confidentially. Finally, the participants did read and sign the Informed Consent Form (Appendix E). All data collection was securely stored, and only the researcher has access. All the data will be deleted after the study is done.

### **Reporting and implementing research**

This section discusses the knowledge base definitions on reporting and implementing research that brings more significance to a better understanding of the skills in my leadership research. Leadership adequately communicates research findings and applies the findings in the workplace. As a researcher, I should observe to make sure that the project is implemented and as well, published correctly. It is also essential to document and present research findings in a manner that is comprehensive, accurate, and practical for leaders. According to Wickham and Wilcock (2012), the most important part of the report is the executive summary: this sells the report to the reader and invites him or her in. More academically, a research report “is a completed study that reports and

investigation or exploration of a problem, identifies questions to be addressed, includes the collection and analysis of data, and advances and interpretation of the data to read and evaluate research” (Creswell, 2013a, p. 288). The audience is also essential when writing the research reports. According to Creswell (2013a), there are six different types of audiences. They are 1. dissertations and theses, 2. dissertation and theses proposals, 3. journal articles, 4. conference papers, 5. conference paper proposals, and 6. policy or school reports. The reports also differ in purpose, length, and format.

Along with my professional life as a leader and connecting it to my academic life at York University in Canada and Andrews University in the USA, I learned how to read and evaluate the reports through the different audiences, as presented above. Not enough, I had to learn by practicing how to grasp the more quantity of information in a short period of time. This kind of skill only is developed by practicing it. After years in both programs, York and Andrews Universities, and reading and analyzing hundreds of articles and dissertations, I can affirm that I could learn how to explore in the fastest way and get the most from them.

#### Structure of the report

Be it qualitative or quantitative; it is always advisable to learn how to read how the study is physically structured or the organization of the report. Creswell (2013a) recommended the following four technics that can help to read and evaluate the report:

1. Examine the different levels of headings. The headings contain the significant points in a study,
2. Have the six steps as a reference, which be in the qualitative or quantitative, guide you through the report. They are the research problem, literature, a purpose

statement and questions or hypotheses, data collection, data analysis, and discussion or interpretation, and a reporting format,

3. Follow the research questions and their answers. Start with the introduction and then look at the end of the report to evaluate how the researchers answered the issues, and

4. Be familiar with the two different types of reports, explicitly differentiating between qualitative and quantitative.

### Why is implementation important?

Malphurs (2013) presented seven reasons why implementation is important. They are:

1. Accomplishes the strategic plan: Implementation is “what closes the gap between ideas and their execution” (p. 286). It is an action plan, balances theory with practicality, planning with practice.

2. Maintains momentum: maintain excitement among the processes and accomplishments.

3. Wards off complacency: instead complacent, be an executor.

4. Addresses the problem of time: pursue the process, regardless of time. Set up deadlines and keep you on time.

5. Keeps the team on track: implementation is a paced process. So, “keep everyone on track and on purpose” (p. 287)

6. Nourishes the process: the implementation strengthens the identification with the methods, and

7. Heightens optimism: “when people see good things happening and bad things corrected, it has a positive effect” (p. 288).

Anyways, Whetten and Cameron (2011) argued that “effective implementation is usually most effective when it is accomplished in small steps or increments [...] any implementation requires follow-up to prevent negative side effects and ensure solution of the problem” (p. 177). The authors follow the reasoning presenting some attributes of practical implementation and follow-up such as 1. Implementation happens at the right time and in the right sequence, 2. Implementation occurs little by little, 3. Implementation promotes opportunities for very good feedback, 4. It creates support and commitment, 5. There is a need to have a measurement and monitoring system, and 6. The assessment of success is based on problem-solving, not on side benefits (Whetten & Cameron, 2011). Concluding the section on reporting and implementing research, implementation is “considered to be the most difficult stage because it involves bringing together people who may have varying levels of motivation, commitment, and dedication” (Lussier & Achua, 2013, pp. 407-408).

### Summary

This chapter presented the knowledge base for three essential areas when talking on leadership and research. The reading and evaluating research, conducting research and reporting, and implement research. On the first, I analyzed the criteria for evaluating a research report and its importance. On the second, conducting research, I presented the rationale for using both the qualitative method design and the formative research methodology to improve a designed theory, the Mission-driven Excellence (MdX) Strategy. I used these methodologies for data collection and data analysis following the purpose, problem, and the three guiding research questions for this study turned into the three study research questions. Due to its nature of collecting recommendations for

improvements, formative research methodology was essential for this study because it was the appropriate tool for the MdX Strategy, which was seeking to be improved. I used purposeful sampling for all data collection instruments. I collected data from multiple data sources, and the analysis focused on the strengths (what worked well) and weaknesses (what did not work well) of the methodology looking for improvements (better ways to implement the strategy).

On the third and last, reporting and implementing, I explored how the report should be structured, followed by why the implementation is essential. In my study, I analyzed the MdX and its implementation in the six pilot churches. This process is still ongoing in these churches.

## CHAPTER 3

### PRACTICAL EXPERIENCES

I am the type of leader that is always open to learn and grow in my knowledge toward a better leadership. With the knowledge base above, I addressed my efforts to shape my experiences on leadership and research, focusing on the essential “best fit” artifacts that are a result of the three competencies analyzed in this paper:

- 4a. Reading and evaluating research;
- 4b. Conducting research; and
- 4c. Reporting and implementing research.

In brief, what I shared before. I was born in Brazil. I have been living in North America for the last 17 years. Over the years, I have had the opportunity to work in a variety of areas such as 1. vice-president for commercial banks and CEO for a car dealership in Brazil; 2. assistant pastor for SDA churches; 3. musician, music director, choir’s director, and vocal group conductor for SDA churches; 4. musical producer; and 5. music school director and music teacher in U.S. and Canada. These three different fields, business, music, and church, combined and aligned, have contributed to my personal and professional development. They have shaped how I manage and implement my leadership. I can learn new ideas every day, and most important of that is that I can apply them directly to my daily duties.

### **The connection between the knowledge base and the artifacts**

Right now, I just finished my dissertation at Ph.D. at Andrews University. I am also working as a music school director and teacher at Avivar Music Learning Center in Danbury, CT. However, my experiences come from combined areas in business, music, and church. My effort is to show the artifacts that could best represent my experiences in these competencies over the years. I am a Christian and SDA believer. As a Christian and leader, I have my core values, beliefs, and qualities, such as 1. God is all; 2. God's plan to have a family; 3. My parents are an excellent framework for my family; 4. Home should be a piece of heaven on earth; 5. Friends and relatives, always seeking a way to serve them; 6. Open heart for changes; 7. A visionary leader; 8. Positive thought and positive person, 9. Honesty is always the best policy; 10. Trust has to be earned; 11. Integrity, and 12. Have faith in God. Combined with my values, beliefs, and qualities, I have to express my thinking through a combination of factors such as live actions, words, letters, and collectively when working in teams, just to name a few. Ideally, my skills and behaviors are responses to the environment around me at the same time that they are directed consistently by my beliefs and values when leading organizations.

### **What artifacts have been generated?**

To improve my leadership and research, I have developed, worked, and executed several projects. Artifacts represent these projects. Many of them were implemented through different roles I was assigned either on business, music, or church leader. I also want to mention that as a student, I took classes in three different universities and countries (SPEI/ISPG in Brazil, Andrews University, U.S., and York University, Canada).

A brief description of how each of these projects influenced my leadership through organizations' growth follows:

**Artifact A.** Among several classes taken at York University in Toronto, Canada, most of them were essential when talking about leadership skills. The Internationally Educated Professionals (IEP) is a bridge program offered to skilled immigrants to prepare them to work in Canada. So, these courses improved my knowledge and gave me the learning needed to develop my skills.

1. AP/HRM 3440: Leadership and Management skills. This course explored the importance of managerial and interpersonal skills. The course aimed to develop and critique the skills under four main headings: personal skills, interpersonal skills, group skills, and specific communication skills. Through self-awareness, case analysis, experiential learning, role-play, and improvisation, students, experienced the importance of managing personal stress, managing conflict, building effective teams, and many other managerial and interpersonal skills processes.

2. AP/ADMS 4950: Principles of consulting. This course was a case-based course intended to provide students with an introduction to consulting, the consulting field, and an understanding of the critical skills and essential strategies required. Students experience consulting engagement working with a consulting team on a real project with an actual client. This course included components such as 1. the identification of client needs and project requirements, 2. the specification of project objectives and its timeline, 3. conducting research, establish the ways, and data analysis, 4. After the study, prepare a final presentation of research showing the findings and presenting the recommendations;

5. design of new programs, strategies, and solutions; and 6. implementation of the project.

3. AP/ADMS 4460 – Organizational Development. This course investigated, examined, and proposed critiques on the diagnosis of problems, and the design and implementation of programs for employee and organizational development. Emphasis was placed on integrating theoretical and experiential knowledge, and the development of intervention skills as ways of understanding and responding to change in organizations. Among the course objectives, I highlight the following: 1. To provide a knowledge of the methods of seeing and reading organizations, 2. To critically review approaches to organizational analysis and diagnosis, 3. To understand ways of intervening in organizations to facilitate change and development, and 4. To develop the capability to see administrative issues from some perspectives with many possible and variable resolutions.

See the following artifact(s):

A:1. York University - Certificate In Canadian Business for Internationally Educated Professionals, and

A: 2. York University – Celebrating Success 2015 Graduation, and pictures.

This artifact A is appropriate for all three competencies: 4a., 4b., and 4c.

**Artifact B.** Among several classes taken at Andrews University, many of them were essential to understanding leadership and research. So, these courses improved my knowledge and gave me the learning need to develop my skills in research.

1. LEAD 637: Issues in Research. This course explored the development of skills in finding, reading, and evaluating quantitative and qualitative research. One crucial part of this course is how to organize a literature review on their topic of preference.

2. EDRM 605: Qualitative research. This course explored a vast knowledge of how to conduct qualitative research. The primary purpose of taking this class was to help me to understand and practice the philosophical implications of any good qualitative research project.

3. EDRM 611: Statistics. This course explored numbers, formulas, and knowledge on how to collect, interpret, analyze, understand, and make decisions through the statistical numbers. Through this class, some areas were seen, such as 1. analysis of educational, counseling & psychological data using descriptive and basic inferential statistics; 2. frequency distribution; 3. measures of central tendency; 4. Dispersion; 5. Correlation; 6. t-tests; 7. one-way Analysis of Variance; 8. simple linear regression; 9. introduction to multiple regression analysis; and 10. Chi-Square. The SPSS software was used for all data analyses.

4. LEAD 880: Dissertation proposal. This course explored the basics of the dissertation proposal.

5. LEAD 889: Dissertation. It is the dissertation process.

See the following artifact(s):

B:1. Grades for the classes.

B:2. The final product: the dissertation

This artifact B is appropriate for the competencies: 4a., 4b., and 4c.

**Artifact C.** In Brazil, I worked for Citibank, NA. I was a Region Manager responsible for nine out of 21 branches of the bank. The offices were located in: Curitiba, Porto Alegre, Moinhos de Vento, Blumenau, Londrina, Campinas, São Jose do Rio Preto, Ribeirão Preto e Campo Grande. To be familiarized with the bank and its product, I took many pieces of training that helped me not only to learn, but I also committed to giving my staff the individual instruction. I also used to train the managers on bank products and systems to acquire the knowledge they need to work better reading reports and statements. As MIS (Management Information System) South manager, I developed and implemented a system that helped the bank segment its potential customers. This program was called: Distribution strategy. I also prepared and presented a report, including suggestions for changes to be implemented in the Citibank South region branches.

See the following artifact(s):

C:1. Citibank's newsletter,

C:2. Management control reports/folder by branches

This artifact C is appropriate for the competencies: 4a., and 4c.

**Artifact D:** In my academic development and preparation for my professional journey, I took a bachelor's degree in Business Administration, Specialization in Finances, an MBA Executive focusing on Finance and leadership in Business. Among the several classes taught, many of them helped me to grow in knowledge and better understand my role as a leader, focusing on specific areas of leadership. One of them discussed "administration and organization." Subjects learned: 1. The institution, and the creativity, 2. The concept of the organization, 3. The organization vs. market view, 4.

Revenue source, and cost accounts, 5. The concept of efficiency and effectiveness, 6. Organization x administration, 7. The functions of the administration, 8. Levels and structure of the organization, 9. Management activity, 10. The systemic view: contingencies, 11. Measures of managerial efficiency, and 12. The skills that make an effective manager. I took the financial planning class. Through this class, I learned topics such as 1. budgetary system, 2. financial planning, 3. analysis of the company's current situation, 4. competition analysis, 5. tactical plan, 6. policy of action, and 7. action plan. I also took the following classes: 1. Public and Private Law I and II, 2. Administrative Law, 3. Tax Regulation I and II, 4. Economic Policies and Tendencies, 5. Organizational Diagnosis, and 6. Approaching and Solving Problems.

See the following artifact(s):

D:1. BA Degree, and

D:2. SPEI/ISPG (Specialization in Finance, MBA Executive, and York University): scholar reports, certificates, and transcripts

This artifact D is appropriate for the competencies: 4a., and 4c.

**Artifact E.** As CEO for Montalve Monte Alegre Veiculos, a Volkswagen car dealership located in Telemaco Borba, Parana, Brazil, I was not only assigned to promote a re-engineering for the company but to be the best car dealership in the state. I assumed full responsibility for redesigning the organization as well as developing a growth plan. Included in this strategy, I also prepared and conducted many meetings with the staff and the employees.

See the following artifact(s):

E:1. Letter to Citizenship and Immigration Canada describing my duties as CEO/President of the company,

E:2. Management control reports by departments (new and used vehicles, parts and services, and

E:3. Copy of many meetings and reports illustrating the strategy.

This artifact E is appropriate for the competencies: 4a., and 4c.

**Artifact F.** In addition to engaging in the proposed readings and discussions, I have included in this competency a portfolio showing the artifacts mentioned above. These artifacts were captured from my experiences, and they demonstrate my ability to lead, deal, work, develop, and evaluate others and organizations. They also show my ability to articulate my standing on these relevant issues.

### **What are the implications?**

Personally, these competencies helped me to acquire more knowledge in working for my leadership and research. According to McKee, Boyatzis, and Johnston (2008, p. 7), “people learn and develop when what they want to change matters deeply and will affect them both personally and professionally.” Every single competency is a process that, in the end, has an intrinsic desire for something different to happen. For this reason, it moved me to do things that helped me to be a better leader also acquiring skills in research.

The main implications I visualize are 1. Leaders must work with a tuning channel always reaching the best part for both sides, the organization and the personal, and 2. “Leaders will require highly developed contextual awareness and conceptual thinking to

identify and implement the right structures for their organizations” (Vielmetter & Sell, 2014, p. 32). This is so true because the technologies available today bring a new way to think and do things and be aware of the changes and innovations required by the leaders. If you do not follow these requirements, the company tends to die over the years.

### **What are the challenges going forward?**

The challenge going forward will be not slipping back into self-defeating thinking about the past. I must keep reminding myself that there is an old and a new story. In my life, I cannot change the old story, but I have control over the new story that arises every single day. “Leaders will play a pivotal role in overcoming divisions between generations and cultures, and ensuring that they all work productively together” (Vielmetter & Sell, 2014, p. 115). So, my better understanding of leadership and research through organizations involves discovering the fundamental truths in life by passing through the hardship of the moment. Only in this way I can be elevated to the status of a better leader.

### **What future opportunities am I going to pursue?**

This reflection paper has brought me to a new awareness of my learning in leadership and research. It changed my life as it made me more aware of my deficiencies in conducting research. However, it also helped me process and deal with the innate role-play of the leaders. Managing organizations was not enough; I had to lead them and implement my leadership through them. Vielmetter and Sell (2014, pp. 54-55) asserted that “leaders will need to be the agent of change. They will need to innovate it, implement it, find partners to help them, and communicate it to their workforces. They will need to clarify not only the practicalities (structures, roles, responsibilities, tasks, and targets) but also the greater good behind the transformation.”

On the other hand, “leaders will need to be curious about and open to employees’ and customers’ pluralistic drivers, to understand what motivates people and be able to attract, engage and retain them” (Vielmetter & Sell, 2014, p. 75). The future still shows me that leadership and research require continuous skills and practices to make them successful. Section 4 of the competencies, in general, gave me a glimpse of what is important and how I need to do to reach success not only in my personal but professional lives. Nothing motivates more than success. Each success provides an opportunity to build on what went well or not so well and help identify ways to keep improving.

## CHAPTER 4

### CONCLUSION

I've been a leader since I was a little child. Along with my age versus the experiences, I always was in the position of a leader. In the Seventh-day Adventist (SDA) church organization, I was the first elder, music ministry, and Pastor assistant for the Greater New York Conference in New York, NY. As a businessman, I was entitled as the leader and CEO/President of the organization. Today, I own and work as a Music School Director and teacher. To reach the format of the leader I want to be, I have to add knowledge, skills, and develop new paths and ways to lead. I define my leadership style as - a leader with a vision, positive thought, positive person, an individual of integrity, a risk-taker, always trying to reach the balance in life, motivator, dynamic, able to form groups and lead teams, achiever, strategic, learner, communicator, includer, focus, entrepreneur, creative and pro-active. My most influential leadership phrase is: "Never give up – keep doing – I can do it - Try it, and I will succeed."

I believe that there is always something new that I can add in my day-schedule, knowledge that can contribute to reaching my goals, and make me better as a leader. Leaders "face dilemmas that require choices between competing sets of values and priorities, and the best leaders recognize and face them with a commitment to doing what is right, not just what is expedient" (Hughes, Ginnett, & Curphy, 2012, p. 150). Good leadership requires excellent human skills. When we talk about human skills is almost

impossible not to connect them to the way they behave. However, the ease with which we exhibit or can “change behavior will partly be a function of our values, personality, and intelligence” (Hughes et al., 2012, p. 244). Leading is never easy. The personal and physical price of leadership can be substantial. Some days, it may seem that nothing is right. Sometimes a feeling about a sense of frustration and futility as setbacks and sacrifices add up. This creates pressure and stress, causing many leaders to lose their focus. The challenges of leadership and life are too high, and the happiness and meaning derived solely from the ego are too small to sustain us.

This paper presented the leadership and research family of competencies. The title for my dissertation is: Strengthening mission through strategy: An analysis of the Mission-Driven Excellence (MdX) Strategy. Among all the topics and knowledge base presented, I explored the rationale for using qualitative method design and the formative research methodology to improve a designed theory, the Mission-driven Excellence (MdX) Strategy. I used these methodologies for data collection and data analysis following the purpose, problem, and the three guiding research questions for this study turned into the three study research questions.

I used purposeful sampling for all data collection instruments. I collected data from multiple data sources, and the analysis focused on the strengths (what worked well) and weaknesses (what did not work well) of the methodology looking for improvements (better ways to implement the strategy). This paper helped me understand, acquire knowledge, and apply the theories and other leadership skills to my leadership style. However, the truth is that regardless of as much as I read and study, I perceive that I do not know as much as I desired, and I still have a lot to learn in my journey as a leader. I

would say that leadership and research, like swimming, cannot be learned only by reading about it. It has to be practiced. Thus, as much as you practice, the better you become. Let me make another analogy. If you ever used weight equipment at a gym, you know that you do not exercise the muscles individually one at a time. Such a specific approach would take forever, and you would not get the results. Your muscles are designed to work in groups as well as successful leadership.

I started the program at Andrews University with a limited level of knowledge and skills in my leadership and research. I finished it with the feeling that, even with some deficiency and proficiency in the language and some setbacks, my knowledge and skills were increased. I think that the role of the leader is very similar to an orchestra's conductor. It is the leader's responsibility to fully understand the vision of the new organizational song as envisioned through the implementation of the planned initiative. It is through this understanding that the leader brings forth the appropriate strategies that can enrich the organization's melodies of responsiveness to the identified need. Ultimately, creating such a rich experience of progressive excellence that members of the workforce will not only start to sing this new song but will embrace the next section of their "institution's song of change" as they spontaneously sing or play their part. I also believe that leadership is courage towards actions. Courage gives me the confidence to make a decision and to think that I can do it. Thus, courage entails choosing the right direction in the face of adversity. It does not mean that I don't feel fear. Instead, "Courage...is about choosing to face danger and risk, despite your fear" (Kouzes & Posner, 2006, p. 134). Therefore, my perspective was that through the success of the MdX Strategy, the churches would concentrate more diligently in strategic planning and

implementation that would give direction on how to reach more people with the Christ-centered message of hope and wholeness.

## APPENDICES

## Appendix A: MdX Inventory

# Mission-Driven Excellence (MdX) Inventory

Date: \_\_\_\_\_

**Directions:** Are these Habits currently in place in your congregation? Rate from “1” (not at all) to “10” (absolutely) only giving a rating of “10” if every part of the Habit is in place. The entire group taking the inventory—the church board, for example—should come to consensus on each rating. Rate and/or discuss this inventory every quarter to measure your progress. And remember, no names!\*

## PREPARATION

**Habit 1: Taking Inventory.** Every quarter, we review ratings on this MdX Inventory to monitor our strategic focus. We also review other key indicators of church excellence. We use this information to grow and improve.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

**Habit 2: Making Commitments.** After a period of close self-examination, at least once a year our congregation expresses its commitment to become a more Spirit-filled, mission-focused church. We often remind ourselves of the commitment.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

## BUILD TEAM

**Habit 3: Checking Climate.** Our church is a unified, close-knit family that reflects God’s character. Humility, trust, and Christ-like communication mark everything we do. Our worship and our warmth appeal to visitors.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

**Habit 4: Developing Leaders.** Our pastoral staff, department leaders, and each of our members receive coaching, helpful feedback, and nurture. This helps us do our best work for God and for those we serve.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

## AGREE ON MISSION

**Habit 5: Envisioning Mission.** Everyone in our church knows our mission statement from memory. It guides our church’s visionary goals, departmental priorities, and annual plans for *whole-church* evangelism.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

## STRATEGY IN WRITING

**Habit 6: Strategy in Writing.** Our church strategy, or mini-strategy, is updated each year with a copy to every member. This document helps us work closely together in accomplishing our common mission.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

**Habit 7: Aligning Departments.** Every year, each department submits the top three outcomes (not just activities) it plans to accomplish for the year. These strategic plans, approved by the board, drive the annual budgeting process.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

## IMPLEMENT STRATEGY

**Habit 8: Accomplishing Mission.** Each year all departments and members collaborate closely in carrying out our strategic plans. These include at least two *whole-church* missional events per year—one of which is evangelism. The results are remarkable!

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

**Habit 9: Accessing Impact.** We keep an up-to-date scoreboard that reports progress to our church on key success indicators. In this way, we continuously evaluate the effectiveness of our ministry to the congregation and community.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

## CREATE A CULTURE OF MISSIONAL EXCELLENCE

**Habit 10: Becoming a Model.** We score high on all the Habits above that have become ingrained Habits in our church culture. We’re now recognized as a demonstration site for other churches even as we continuously work toward improvement ourselves.

Definitely NOT 1 2 3 4 5 6 7 8 9 10 Absolutely YES

Appendix B: Demographics Survey

SAMPLE SURVEY FOR DEMOGRAPHIC DATA

SAMPLE SURVEY FOR DEMOGRAPHIC DATA

Thank you so much for being a participant in this study. Please, complete the survey and return it to me. Note that all information collected is entirely confidential and will only be used for this research study.

Demographic Data Sheet

- 1. My gender is: Female Male
2. My age is: 23-30 31-40 41-50 50+
3. My race/ethnicity is: White African American Asian Hispanic Native American Native Canadian
4. Member at church:
5. SDA member for how many years: 0-5 6-10 11-15 16+
6. Department/Role at your church:
7. How long in this department at your actual church: 0-2 3-5 6+
8. Your purpose for participating in this MdX Strategy implementation:

Thank you for completing this survey. Your participation and time are precious and will help a lot in this MdX Strategy improvement towards the mission accomplishment.

## Appendix C: Interview Protocol

## **INTERVIEW-FOCUS GROUP PROTOCOL**

Project: North American Division, Mission-Driven Excellence (MdX) Strategy implementation

Time of Interview: \_\_\_\_\_

Date: \_\_\_\_\_

Place: \_\_\_\_\_

Church name: \_\_\_\_\_

Interviewer: \_\_\_\_\_

Interviewee: \_\_\_\_\_

Role/Position of Interviewee in the church: \_\_\_\_\_

Did you sign the Informed Consent Form? ( ) Yes

Did you complete the Demographic Data Sheet? ( ) Yes

Basics for this interview:

1. The mission of the NAD is to reach North America with the Christ-centered message of hope and wholeness. The Office of Strategy and Research at the North America Division has started a project that supports churches in how to be more strategic implementing this mission. The emphasis of this new approach towards mission accomplishment is to promote a culture change through organizational habits that lead to a thriving organization.
2. The purpose of this study is to understand how the Mission-driven Excellence (MdX) Strategy is perceived and used by the selected participants in the North America Division (NAD).
3. Please, note that all data collected is entirely confidential and will be treated confidentially and will only be used for this research study.
4. The interview will take from 45-60 minutes (one-on-one), and 60-90 minutes (focus group). I will audio record all data collected through the interviews, type, and transcribe them using appropriate software, and store directly to my own computer that requires a personal password to have access to it, which will be securely stored until the study is completed, being wholly deleted after the study is done.

### **QUESTIONS:**

1. How long have you been doing MdX Strategy implementation in the church?  
What did you do until now? Where are you in the implementation?
2. Did you read and inform yourself all about the MdX Strategy and its resources?
3. How would you briefly describe the MdX Strategy to someone who didn't know about it?

4. What do you like about the MdX Strategy?
  - a. What do you think should NOT be changed?
  - b. What are the pros/strengths?
5. What would you suggest to be changed?
  - a. What are the cons/barriers/weakness?
6. How could the MdX Strategy be improved?
  - a. Do you have any suggestions for how to improve the MdX Strategy?

## Appendix D: IRB Approval

March 6, 2020

Oswaldo Santos  
Tel. 203-706-2478  
Email: [santoso@andrews.edu](mailto:santoso@andrews.edu)

**RE: APPLICATION FOR APPROVAL OF RESEARCH INVOLVING HUMAN SUBJECTS**  
**IRB Protocol #:**20-029 **Application Type:** Original **Dept.:** Leadership  
**Review Category:** Exempt **Action Taken:** Approved **Advisor:** Randy Siebold  
**Title:** Strengthening mission through formative research: An analysis of the mission-driven excellence strategy.

Your IRB application for approval of research involving human subjects entitled: "*Strengthening mission through formative research: An analysis of the mission-driven excellence strategy*" IRB protocol # 20-029 has been evaluated and determined Exempt from IRB review under regulation CFR 46.104 (3)(i): Research involving benign behavioral interventions in conjunction with the collection of information from adult subjects through verbal or written responses or audiovisual recording and in which subject identification is handled confidentially and appropriately. You may now proceed with your research.

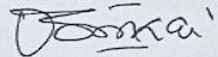
Please note that any future changes made to the study design and/or informed consent form require prior approval from the IRB before such changes can be implemented. In case you need to make changes please use the attached report form.

While there appears to be no more than minimum risks with your study, should an incidence occur that results in a research-related adverse reaction and/or physical injury, this must be reported immediately in writing to the IRB. Any research-related physical injury must also be reported immediately to the University Physician, Dr. Katherine, by calling (269) 473-2222.

We ask that you reference the protocol number in any future correspondence regarding this study for easy retrieval of information.

Best wishes in your research.

Sincerely,



Mordekai Ongo, PhD.  
Research Integrity and Compliance Officer

## Appendix E: Informed Consent Form

**Andrews University**  
**INFORMED CONSENT FORM**

**Research Title:**

**Strengthening Mission Through Formative research: An analysis of the mission-driven excellence Strategy.**

**Principal Investigator:**

Oswaldo Souza Santos Junior

**Advisor:**

Randy J. Siebold, Ph.D.  
Director, MA & Doctor of Leadership programs  
Assoc. Director, Global Leadership Institute  
Andrews University

**Statements about the Research:**

This research study is part of my dissertation project, in partial fulfillment for my Ph.D. in Leadership at Andrews University, Berrien Springs, Michigan. Your participation in this study is greatly appreciated.

**Purpose of Study:**

The purpose of this research is to provide evidence for the value of the Mission-driven Excellence (MdX) Strategy and to make suggestions for its improvement.

**Procedures:**

As a participant, you will be asked questions that will help to evaluate the Mission-driven Excellence (MdX) Strategy as well as to make suggestions for its improvement.

This study will be conducted using a formative research methodology which will help to gain feedback on the value of the MdX Strategy. Due to its contribution to gathering recommendations for improvement, a formative research methodology is an appropriate tool for this study.

The population for this research will be some of the pilot churches participating in the MdX Strategy implementation in the North American Division (NAD). The research sample for this research will be approximately six churches coming from the 55 pilot churches in the United States and Canada. I will contact Ontario Conference and select a representative sample of churches inviting them to participate in the study. Next, I also will contact the pastors to see if they are willing to participate in this study. I will visit the churches physically and attend church service, interview pastors, elders, conduct focus group(s), and talk to the church board members, etc.

The data will be collected from multiple data sources such as interviews, observation, and document analysis. Most of the meetings will be conducted at the participant's local church. The data collection will focus on how to improve the Mission-driven Excellence (MdX) Strategy, looking for its strengths [what should not be changed], and at the same time looking for its weaknesses [what should be changed]

I will receive external funding once I have contacted the North American Division (NAD) for reimbursement of travel expenses.

**Duration of participation in study:**

The interviews will take from 45-60 minutes (one-on-one), and 60-90 minutes (focus group).

**Risks and Benefits:**

I/We do not anticipate any risks from participating in this research.

**Voluntary Participation:**

Participation in this study is completely voluntary, refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may discontinue participation at any time without penalty or loss of benefits to which you may otherwise be entitled.

**Privacy/Confidentiality/Data Security**

After all the material is gathered, I will transcribe the interviews using the Express Scribe software, and then analyze, organize, and code all the information using qualitative analysis software Dedoose. I will look for themes and patterns and organize them into categories of strengths and weaknesses. After that, I will analyze the data looking for suggestions and improvements to the MdX Strategy.

To protect your privacy, it is important to mention that:

1. The time invested in this process will be used to identify strengths and weakness for this project looking for suggestions for improvements, and
2. I explained to you the purpose of the study and how I will proceed with the research.
3. Our entire interview will be recorded in audio, and all the data will be saved on my computer for a period of three years.
4. Only I, as the researcher, will have access to the data, and
5. I may contact you in the future for some clarification.

**Confidentiality:**

Your identity if any, will be kept confidential to the extent of the law. There will be nothing linking you to the study. None of your identifiers if any, will be used in any report or publication. Your name, church, and significant identity characteristic will be private, and if you are quoted in this study, you will be pictured only by letter (i.e., participant A).

**Whom to Contact:**

If you have any questions about your rights as a subject/participant in this research, contact my advisor Dr. Randy Siebold @ 269-471-3200, [rjs@andrews.edu](mailto:rjs@andrews.edu). You can also contact the IRB Office at [irb@andrews.edu](mailto:irb@andrews.edu) or at (269) 471-6361.

**Statement of Consent:**

I have read the above information, and have received answers to any questions I asked. I consent to take part in the study.

Your Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Your Name (printed): \_\_\_\_\_

Signature of person obtaining consent: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name of person obtaining consent:  
\_\_\_\_\_

Note: This consent form will be kept by the researcher until the end of the study.

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