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CULTIVATING A DONOR BASE: HOW COLLEGES AND UNIVERSITIES USE
PUBLIC RELATIONS TECHNIQUES TO INFLUENCE UNDERGRADUATE
STUDENTS TO BECOME DONORS

by
Heather Ann Sheridan

A Thesis

Submitted in partial fulfillment of the requirements of the
Master of Arts Degree
of
The Graduate School
at
Rowan University
May 1, 2006

Approved by

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ABSTRACT

Heather Ann Sheridan

Cultivating a Donor Base: How Colleges and Universities Use Public Relations
Techniques to Influence Undergraduate Students to Become Donors

2005/06

Joseph Basso, J.D., Ph.D., APR
Master of Arts in Public Relations

This study examines effective public relations techniques used by higher education fund raising professionals in cultivating an alumni donor base. The researcher surveyed fund raising professionals in the nation's top private and public colleges and universities. The researcher also conducted a personal interview with a top fund-raiser in the field of higher education.

Survey participants rated donor bases, identified when they begin to cultivate relationships for lifetime giving and the effectiveness of strategies to obtain alumni support. The researcher surveyed key fund-raisers from 124 of the nation's top colleges and universities. This study examined what strategies fund-raisers deemed effective in obtaining alumni support. The study also identified what fund-raisers' felt was the most important aspect of cultivating a relationship with their alumni donor base.

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To Mom, Brian, Pop-Pop Harry and Grandma Annie I dedicate this project. You have touched my life, and my heart, more than you will ever know.

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Chapter I

Introduction

Strategic planning in an organization allows organizational members to understand what they need to know, their audiences and the messages to effectively communicate. College and university fund-raising officers rely on the use of strategic planning in establishing fund-raising campaigns for their institutions. Fund-raising professionals hold a unique position in the higher education community. Jeri L. Kozobarich describes:

Poised at the edge of the university, with one foot in the academic realm and one in the surrounding community, advancement professionals promote the mission of the institution. They raise money, communicate with various external constituencies, and link alumni to their alma mater.¹

Fund raising in higher education institutions targets potential private donor bases to allow the institutions to fund various functions and programs essential to the excellence of the institution. Colleges and universities aim to cultivate relationships with donor bases that establish a relationship of continual giving and loyalty to the institution. Potential donor bases often include alumni, foundations and corporations. The college or university must share a common mission and goal with the donor in order for a relationship to form.

¹ Kozobarich, Jeri L. "Institutional Advancement." New Directions for Higher Education 111 (2000) 25. Academic Search Premier. EBSCOhost. Rowan University Campbell Library, Glassboro, New Jersey. 24 September. 2005 <<http://searchepnet.com>>.

Fund-raising officers' plans often include using various members of the institution, from faculty to students, to carry out the strategies to establish a relationship with potential donor bases.

Statement of the Problem

Budgets directly affect the reputation and academic standards of the individual institution. Due to severe cuts in state funding over the past two decades, public institutions have raised their level of seeking outside funding. "State funding for state colleges and universities has diminished to the point that some institutions claim they are 'state-assisted' rather than 'state supported.'"² Competition between public and private colleges and universities for donor support has grown considerably. Now, more than ever, colleges and universities have developed strategic fund-raising campaigns to target the various private donors.

Out of the potential donors, alumni have proven to be the largest source of private funding. According to a study conducted by Council for Aid to Education's annual "Voluntary Support of Education," alumni represent the largest contributions (as 27.5 percent of total contributions), while for the number of actually contributing alumni declines, a drop of 12.8 percent.³

While some institutions may not begin to ask their alumni for financial support until post commencement, others begin planting the seed of philanthropy and stewardship from the moment students begin their freshman year. "Some alumni will respond well to

² Kotler, Philip and Karen F.A. Fox. Strategic Marketing for Educational Institutions: Second Edition. Englewood Cliffs: Prentice-Hall, Inc. 1995. 13.

³ Strout, Erin. "Fund Raisers Become Harder to Find and Tougher to Keep." The Chronicle of Higher Education 28 October 2005: <<http://chronicle.com>>.

general appeals for unrestricted dollars to advance the greater good of their universities. But many others, having a special attachment – or at least the seed of one- to a specific department or program, may be more inclined to give money to the smaller entity.”⁴

The economic environment often affects the level of giving; however, the concern has now become the level of alumni giving. What are colleges and universities, both public and private, doing to motivate alumni to contribute? At what point in the relationship do colleges and universities begin to cultivate a relationship of giving?

Purpose of the Study

This study examines effective public relations strategies to influence undergraduate students to become active donors. The author specifically studied strategies of four-year public and private colleges and universities. The author identified strategies used by the nation’s top institutions to develop a relationship of lifetime giving with undergraduate students.

Definition of Terms

Alumni - Graduates with a academic degree

Alumni Relations - An institutions activities or messages to their alumni public

Development – The strategic planning of fund-raising campaigns and efforts

Donors - Alumni or private individuals or entities who provide the institutional with financial support

⁴ Allen, Robert C. “Why Professors Should Learn to Be Fund Raisers.” The Chronicle of Higher Education 13 November 1998: <<http://chronicle.com>>.

Fund-raising Officers - Officers of the institutions development/ advancement staff who plan and orchestrate fund-raising campaigns for the institution

Public Colleges/ Universities – Institutions that receive supplemental state funding

Private Colleges/Universities – Institutions that do not received supplemental state funding

Student Relations – An institutions activities or messages to their undergraduate student population.

Hypotheses and Research Questions

The author tested the following hypotheses.

H1 The majority of fund-raisers rank their alumni donor base as the most important donor base.

H2 The majority of institutions begin cultivating alumni donations one-year post graduation.

H3 Strategies for developing key relationships with staff and/or academic departments and developing relationships with family/parents of current students are the most frequently used, and most effective, in communicating the need for alumni support with undergraduate support.

H4 Strategies for developing key relationships with staff/ departments and alumni participation on campus are the most effective in communicating the need for alumni support with their current alumni donor base.

H5 Fund-raising officers in higher education place a high value on strategic planning.

The author researched the following questions.

RQ1 What recent changes have occurred in the field of advancement, which then affects the alumni donor base?

RQ2 What is the most important aspect in obtaining alumni support?

Assumptions

The assumptions made by the author included the following: at least 30 percent of fund-raisers surveyed will respond and those respondents will answer honestly to all questions.

Delimitations

This study examines the strategies implemented by the institutions during the lifetime of the undergraduate career (recruitment to graduation) and then post graduation.

The author surveyed 124 schools listed as the “Best National Universities,” as rated by U.S. News & World Report: 2006 Edition America’s Best Colleges. The author chose to only survey the top tier of schools listed.

Significance of the Study

This study provides essential information to fund-raising professionals in colleges and universities. The data collected provides insight into effective means of establishing the essential relationship between institutions and alumni. Enhancing the relationship between alumni and their alma mater will significantly raise the level of giving. Knowledge gained by this study can aid fund-raising professionals in the nation’s

colleges and universities to strengthen the relationship with their undergraduates, which would lead to larger contributions by alumni.

Chapter II

Review of the Literature

The author conducted a review of related research to obtain a greater understanding of research that already exists on this topic. The following databases were used:

1. Online Search Engines accessed from the Campbell Library at Rowan University: Academic Search Premier, ERIC, Education FT, Lexis/Nexis, ProQuest and Wall Street Journal Online.
2. The author accessed The Chronicle of Higher Education with a private subscription.
3. The author accessed Rowan University's Campbell Library full catalog.
4. The author used various text sources

The following descriptors were used in all searching methods: "development," "fund raising," "alumni donors," "institutional advancement," "alumni characteristics," "alumni donations," "public relations," "alumni affairs" and "student relations."

History of Higher Education Fund Raising

While fund raising in general has deep historical roots, higher education fund raising traces back only to early colonial institutions, with appeals to private donors. Clergyman often acted as fund-raisers for the country's earlier religious institutions, yet

university and college presidents became the primary source of higher education fund raising.¹

State governments and private initiatives were responsible for financing colleges and universities, while the federal government did not participate. During the nineteenth and twentieth centuries state institutions operated as the private institutions did with “boards of regents and trustees... insulate public colleges and universities from direct control of the government and provide them with the freedom to compete with the other institutions, both public and private, in the quest for students, resources, and status.”²

Fund raising for America’s colleges and universities is unique for the very reason that the federal government does not govern or control these institutions. Rowland (1977) identifies American society’s view of higher education as a public responsibility, while the federal government acknowledges the public service (which provides tax exemption for the institution and its supporters) it does not directly operate or govern them. Rowland explores the historical traditions of America’s higher education institutions and the commercialism of American higher education. First, he recognizes the separation of church and state, which created a visible barrier between the country’s first religious based institutions. Rowland (1997) explores that “the commercial character of American society produces a view of higher education as a commodity to be purchased rather than a benefit to be conferred by society through its government- a viewpoint in which the principle of tuition payments is solidly rooted.” Finally, he

¹ Hermann, Siegfried E. and Janet C. Lukomski. Public University Fund Raising, Florida: Higher Education, 1996:3. ERIC: Education Resource Information Center. EBSCOhost. Rowan University Campbell Library, Glassboro, New Jersey. 24 September. 2005 <<http://search.epnet.com>>.

² Worth, Michael J. New Strategies for Educational Fund Raising. Westport: Praeger, 2002:3-4

explains the tradition that America's early institutions catered to the wealthy, which created elusive and "additional incentives for benefactors." ³

Tromble (1998) describes today's fund raising as "an outgrowth of the alumni movement at Harvard, Yale, and other colleges in the nineteenth century, when alumni rallied for the purpose of saving the institution, and thousands of dollars were raised for alma mater."⁴

Shay (1993) acknowledges, with the continual cutbacks for state institutions, the line has blurred between funding for state and private institutions.

Most state-supported universities now employ large public relations and institutional staffs to help create favorable institutional images and to raise high amounts of money from nonpublic sources. Meanwhile, independent colleges and universities devote considerable attention toward obtaining federal or state support for their students, programs, or the institutions as a whole.⁵

Worth (2002) credits America's high quality of higher education to the level of competition between the colleges and universities. Potential students have become target consumers and the competition among all institutions, public and private, has become even more intense.⁶

Institutional Advancement

Hermann and Lukomski (1996) explain that the University of Chicago, in 1924, was the first to begin using the term development campaign instead of fund raising. "By 1978, Development was referred to as an area of educational administration.

³ Rowland, Westley A. Handbook of Institutional Advancement. San Francisco: Jossey-Bass Publishers, 1977: 2-3.

⁴ Tromble, William A. Excellence in Advancement. Gaithersburg: Aspen Publication. 1998: 17

⁵ Shay Jr., John E. "The President's Perspective on Student Affairs and Educational Fundraising." New Roles for Educational Advancement. Ed. Terrell, Melvin C. and James A. Gold. San Francisco: Jossey-Bass Publishers. 1993: 18.

⁶ Worth, Michael J. 2002: 4.

Development, or the development area, is an important vehicle by which to receive monies from philanthropic organizations or individuals.”⁷

In higher education the term development often falls under the umbrella of advancement departments. Tromble (1998) defines advancement as “building relationships and securing political, moral and financial support. It is growth and expansion of programs, the unfolding of plans, the building of the organization.” In simple terms, according to Tromble, “friend raising comes first, then fund raising.”⁸

Weinstein (2002) describes friend raising as nurturing the relationship between the organization and the prospective donor. Acknowledging that as the relationship grows, so does the donors commitment and donations. ⁹

Worth (2002) breaks down the management functions of the institutional advancement umbrella to “include alumni relations, internal and external communications, public relations, fund raising, and government relations.”¹⁰

Kozobarich explores the function of the institutional advancement in raising funds. He states that while state funding covers basic operating costs, private funds are needed to support “student scholarships, new campus buildings, faculty research and teaching, and a wide variety of other projects that strengthen the university.”¹¹

Worth (2002) defines the involvement of fund raising as “finding donors, developing and deepening their relationships with their institutions, matching donors’ interests and the institution’s needs, and recognizing donors for their support.”¹²

⁷ Hermann, Siegfried E. and Janet C. Lukomski, 1996: 3-4.

⁸ Tromble, William A. 1998: 20.

⁹ Weinstein, Stanley. The Complete Guide to Fundraising Management: Second Edition. New York: John Wiley & Sons, Inc. 2002:109.

¹⁰ Worth, Michael J. 2002: 5

¹¹ Kozobarich, Jeri L. : 25-30.

¹² Worth, Michael J. 2002: 227.

In order to identify the goals of the donor, the internal constituencies of the institution must work together.

In essence, institutions must take a horizontal look across offices and units, enabling deans, faculty, administrators, development officers, and external relations staff to think and work across their job descriptors, not only to identify ways of coordinating unit priorities with institutional strategies but also to link these priorities with private donor's goals.¹³

State institutions rely on private funding to subsidize the increasing lack of state funding. Private gifts also provide institutions with unrestricted dollars in which to apply to budgets for the school to expand and grow.

Private gifts can "help offset vacillations in state funds, provide money that carries fewer restrictions than state money, support innovations, and help protect programs during the culling exercises that sometimes follow budget shortfalls."¹⁴

While internal structures and fundraising campaigns vary from one institution to another, the development process must go through strategic steps before fund raising can begin. Worth identified the initial steps or stages as the following:

1. Deriving an institutional academic plan to determine the financial needs of the institutions and the goals of the campaign. Extensive research to provide insight on potential donors and the type of gifts they can provide
2. The designing and development of programs to cultivate potential donors into the planning process for the institution. These programs must identify common goals and ambitions of the university and the potential donor.¹⁵

In a 1998 staff study conducted by the State University of New York and City University of New York of private fund raising at SUNY and CUNY the following items

¹³ Iannozzi, Maria "Planning and Fundraising: From Bureaucratic to Strategic Management. Exemplars." Akron: Knight Collaborative, 2000. ERIC: Education Resource Information Center. EBSCOhost. Rowan University Campbell Library, Glassboro, New Jersey. 24 September. 2005 <<http://search.epnet.com>>.

¹⁴ Allen, Robert C. : 13

¹⁵ Worth, Michael J. 2002: 8.

were identified as fund raising's "best practices for institutions of higher education to use in raising private funds:"¹⁶

- make a commitment of staff and resources;
- have or obtain significant experience in fund raising;
- maintain adequate alumni and donor records;
- pursue prospect research for donations and major gifts;
- carry out an annual fund;
- set up a planned giving program;
- promote good relations with corporations and foundations;
- coordinate fund raising efforts; and
- increase the support of the president and involvement of the board of trustees.¹⁷

According to Tromble (1998), organizations such as CASE (Council for Advancement and Support of Education) and NSRFE aid newcomers acquire the skills and knowledge in the field of advancement. Yet the same basic principles that have guided the profession over the past century still remain the same:

1. Identify the potential donor.
2. Get to know the prospect.
3. Get the prospect interested in your institution or cause.
4. Involve the prospect in your cause.
5. Ask for the gift.
6. Follow up, bring closure.¹⁸

The Key Players: Fund-Raisers

Fund-raisers in higher education hold valuable positions in the institutional infrastructure. While institutional advancement calls on every member of the university to act as a fund-raiser, from incoming students to the President, the strategic planning of

¹⁶ Barber, Jerry, et al. State University of New York [and] City of University of New York. Staff Study: Private Fund Raising at SUNY and CUNY. Report 96-D-1. Albany: New York State Office of the Comptroller 1998: 22-23. ERIC: Education Resource Information Center. EBSCOhost. Rowan University Campbell Library, Glassboro, New Jersey. 24 September. 2005 <<http://search.epnet.com>>.

¹⁷ Barber, Jerry. 1998 22-23.

¹⁸ Tromble, 1998: 15-16.

fund-raising campaigns lie in the hands of the institutional advancement's professional staff.¹⁹

Worth (2002) identified the three-way leadership partnership of key fund-raisers: Trustees, the president and the chief development officer (CDO):

Trustees represent key roles in the decisions, policies and overall leadership of the institution. According to Worth, trustees are often major donors themselves, many cultivate and solicit donors through hosting events or by accompanying development committee members or in one-on-one presentations to major donors. The second, and the most vital link in the institution, is the president. A president must personify the institution's success and aspirations while balancing competing needs and special interests. The president's involvement in the fund-raising campaign sets the tone and pace for the trustees. The president's support of the development staff also provides opportunities, in the form of budgeting and interaction with the trustees, to assist in the cultivating and soliciting of major donors. The primary function of the CDO is to coordinate the trustees and the president's role in the fund-raising efforts. The CDO maintains the internal and external functions of the development office and the institutions long-term and short-term fund raising goals.²⁰

While institutions begin to realize the vast importance of the development and advancement officers, competition over qualified fund-raisers increases. Both the recruitment and the retention of fund-raising talent has become a major issue for the nation's colleges and universities, with the Council for Advancement and Support of

¹⁹ Kozobarich, Jeri L.: 25

²⁰ Worth, Michael J.: 67-69.

Education (CASE) reporting that “65.5 percent of development officers have been at the institution for 5 years or less.”²¹

Colleges and universities combine their overall fund-raising goals for “annual, capital, and planned giving under an overall comprehensive campaign umbrella.” These campaigns are designed to raise funds for facilities and endowment needs, and range from millions to even billions of dollars.²²

In order to raise the funds for these campaigns, fund-raisers look to private sources. These potential donors include alumni, individuals, corporations and foundations. The institutions need to find and cultivate donors whose vision matches the academic and goals of the institution. “Fund raising, like education itself, is an intensely personal activity; friend raising is the basis of fund raising.”²³

Many institutions, and their fundraisers, carefully plan fund-raising campaigns. They outline their goals, objectives, publics, strategies and tactics. Below is a generic fund-raising planning framework created by authors Adrian Sargeant and Elaine Jay (2004):²⁴

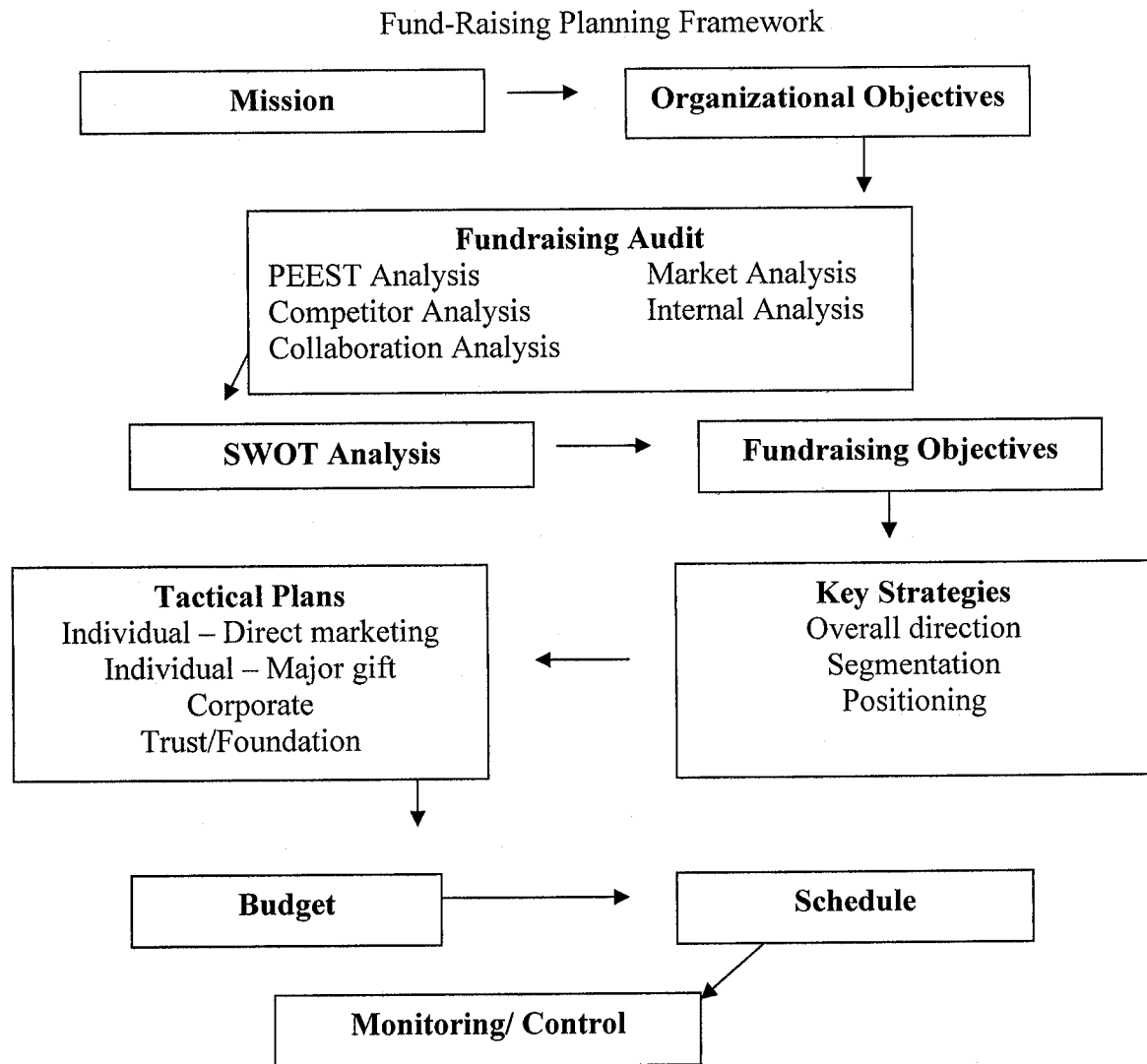
²¹ Strout, Erin.: 28.

²² Worth, Michel J.: 15.

²³ Rhodes, Frank H. T., ed. Successful Fund Raising for Higher Education the Advancement of Learning. Phoenix: The Oryx Press. 1997: Introduction.

²⁴ Sargeant, Adrian and Elaine Jay. Fundraising Management: Analysis, Planning and Practice. New York: Routledge Taylor and Finance Group. 2004: 20.

Figure 1



While development/ advancement officers often are the strategic planners and initiators in the overall fund-raising campaigns of most institutions, they often rely upon the entire institution to carry out the objectives and tactics of the plan. Peter S. Cahn (2005), from the University of Oklahoma, reveals that their percentage of state contribution operating budget has declined, along with inability to raise tuition due to thresholds placed by legislators has put their state-supported institution in a bind. He

states that “more than ever , faculty members are being recruited for the tasks of development, an endless process of wheeling that has come to consumer every sector of the university.”²⁵

Strout highlights the first rule in fund raising: not to ask for money, until you have given yourself. Strout focuses on The University of Winnipeg which, in preparation of a major fund-raising campaign, started an “internal family campaign” to solicit donations from faculty, staff, administrators and retirees. This campaign raised \$2 million dollars (\$1 million donated by Chancellor H. Sanford Riley), hoping the message of giving would reach past, present and future students.²⁶

Alumni Donor Base

Institutional alumni represent a key donor base. Cultivation of the donor base starts at the recruitment of students and continues through their lifetime.

Students begin to look at a college education as a consumer product. They invested time and money, and therefore expect something for their investment. “While the challenges are considerable, there is great incentive for institutions to begin cultivating relationships with alumni, starting as early as a student’s first year of enrollment.”²⁷

Alumni prospects remain a key public because of their pre-existing tie to the college or university. While, in recent years, higher education has seen a decline in

²⁵ Cahn, Peter S. “Class Notes.” The Chronicle of Higher Education. 18 April 2005: <<http://chronicle.com>>.

²⁶ Strout, Erin. “At Winnipeg, All in the Family.” The Chronicle of Higher Education. 33 (2006): A36.

²⁷ Iannozzi, Maria: 9.

philanthropic donations, alumni support remains strong. Vance T. Peterson explains the decline in giving to education as very modest.

And while gifts by alumni were substantially off more, closer scrutiny of the data shows that giving participation by alumni held up quite well. Alumni giving still accounted for 25 percent of total voluntary support, down only 3 percent from 2001. And the drop in total gifts by alumni was primarily a result of holding back on major gifts for capital purposes (a sensible strategy give recent stock-market losses) and shifts into more giving through donor-advised funds and family foundations—the entities ultimately receiving gift credit and tax benefits.²⁸

Allen (1998) characterizes alumni motivation based on how donors react to things they are strongly tied: While some alumni respond to a general appeal for unrestricted dollars from a university campaign, others may give to smaller entities within an organization because of a pre-existing relationship with a faculty member, department or organization.²⁹

Nayman, Gianneschi and Mandel (1993) identify successful strategies to involve current students in advancement activities. First, the authors emphasizes the use of student alumni associations, which has become the most popular and successful means to involve current students in advancement. These programs “effectively socialize students into the institution’s advancement culture by providing them with ample opportunities to serve in key planning and management positions.” Second, the authors recommend using students as financial contributors, with the planning and execution of a senior class gift. Third, the author specifically suggest the use of student fund-raisers; involving

²⁸ Peterson, Vance T. “Giving to Colleges: There’ Reason for Hope.” The Chronicle of Higher Education 17 October 2005: <<http://chronicle.com>>.

²⁹ Allen, Robert C.

students in education fundraising, telephone solicitations and direct solicitation to fellow students, corporations and foundation donors.³⁰

Wunnava and Lauze (2001) studied consistent and occasional donors over a 23-year period at a small, private, liberal arts college. For both donor bases their research identified the following characteristics of alumni as some of the most important to donating: “volunteering for the college, major in the social science division, language school attendance, residence in states with alumni chapters, and employment with the financial sector... and additional alumni with relatives who attended the college and alumni who have played a varsity sport during college.” They also found that gender and membership in Greek fraternities were not significant in consistent donors, while they were significant in occasional donors. Since consistent donors are the minority, the study suggests that development officials concentrate on “sporadic donors and encourage them to give more frequently.”³¹

Gibbs (1996) highlights methods used in education fund raising which include: annual giving programs, personal solicitations, direct-mail solicitations, project funding, capital campaigns, major gifts and planned giving. Stating that annual giving programs are the backbone of all fund-raising activities.

Successful annual giving programs are those conducted by institutional fundraisers who know their donors and why they give. Stewardship and comprehensive planning can lead to an expanded base of donor support that, in turn, can be significant in elevating the level of funding. Such planning should include scanning the environment for changes within the donor community, the

³⁰ Nayman, Robbie L. and Harry R. Gianneschi and Judy M. Mandel. “Turning Students into Alumni Donors.” New Roles for Educational Advancement. Ed. Terrell, Melvin C. and James A. Gold. San Francisco: Jossey-Bass Publishers, 1993. 86-88.

³¹ Wunnava, Phanindra V. and Michael A. Lauze. “Alumni Giving at a Small Liberal Arts College: Evidence from Consistent and Occasional Donors.” Economics of Education Review. v20 n6 (2001): 540-541.

impact of these forces, and where the annual giving program should be, consider the institution's internal mandates as well as the external changes surrounding it.³²

A study by Robert A. Baade and Jeffrey O. Sundberg (1993), conducted between 1985 through 1990 of 750 private and public institutions, looked at institutional and alumni characteristics that affect giving. The most significant finding was that the size of the institution strongly affects alumni contributions. While larger institutions have a tendency to have a larger percentage of alumni who donate, smaller colleges have a larger per graduate donation rate. The other significant finding of this study was that alumni from private institutions did not receive more donations than the public institutions that were equal in size and perceived quality. Their determination was that "this reinforces the importance of forging a bond between the student and institution, because graduates apparently are not swayed by the fact that their private colleges require their donations because they receive less state support than public institutions."³³

Lowenstein (1997) states that fund-raisers must train themselves to be able to identify potential donors. He advises fund-raisers to look for alumni donors by those who fall into the following categories:

1. Those who have given larger amount than average in the annual phonathon or in response to the annual fund-raising letter.
2. Those who have succeeded.
3. Those who have an especially warm spot for your program.

Lowenstein also advises developing relationships with parents of students and visitors to campus because they too are potential donors. He also encourages fund-raisers

³² Gibbs, Annette. "The Role of Environmental Scanning in Effective Fundraising." Strategies for Promoting Excellence in a Time of Scarce Resources. Ed. Breneman, David W. and Alton L. Taylor. Jossey-Bass Publishers: 1996. 59.

³³ Baade, Robert A. and Sundberg, Jeffrey O. "Identifying the Factors that Stimulate Alumni Giving." The Chronicle of Higher Education 29 September 1993: <<http://chronicle.com>>.

to use sporting events, reunions, awards/speeches and education/professional seminars as avenues to build and maintain relationships with potential donors.³⁴

McMillen (1992) explores college fund-raisers who are beginning to see their alumni donors as untapped, and now are beginning to aggressively pursue female donors. With women outnumbering undergraduate enrollments, graduates marrying later and pursuing careers in lucrative fields, female donors are major players. Institutions also realize strategies used to obtain male donors, are not the same that work in obtaining female donors. McMillen states that while male donors often appeal to ego, women often prefer to give anonymously.³⁵

Tromble (1998) determines that the actual ability as a donor for the big gift is 75 percent preparation, 10 percent solicitation and 15 percent follow-up, all of which can take years of relationship building to earn the donor's trust, respect and confidence.³⁶

In his 2003 study, Monks asserts that the common practice of solicitation of the entire alumni donor base in the same way maybe a waste of development's resources, due to findings that sorting alumni by characteristics may provide to be a better targeted and effective strategy. Monks states:

The single biggest determinant of the generosity of alumni donations is satisfaction with one's undergraduate experience. In an attempt to better target alumni/ae who are more likely to make more generous donations; institutions could identify those students upon graduation for whom the past four (or more) years met or exceeded expectations. This information could be used to focus development office resources to those who are most likely to make donations to their undergraduate institution.³⁷

³⁴ Lowenstein, Ralph L. Pragmatic Fund-Raising for College Administrators and Development Officers. Gainesville. University Press of Florida: 1997: 31-35.

³⁵ McMillen, Liz. "College Fund Raisers See Their Alumnae as Untapped Donors." The Chronicle of Higher Education 1 April 1992 <<http://chronicle.com>>.

³⁶ Tromble, William W. 1998: 137.

³⁷ Monks, James. "Patterns of Giving to One's Alma Mater among Young Graduates from Selective Institutions." Economics of Education Review v22 n2 (2003): 129.

Role of Public Relations

Todd Hunt and James E. Grunig (1994) define public relations as “the management of communication between an organization and its publics.” Organizations require a relationship with their determined publics, and use public relations as the vehicle of establishing and maintaining the relationship.³⁸

Smith (2005) defines public relations as:

The management function that classically focuses on long-term patterns of interaction between an organization and all of its publics, both supportive and nonsupportive, seeking to enhance those relationships and thus generate mutual understanding, goodwill and support.³⁹

Early public relations activities for higher education date back to the early 1900s when Harvard, Yale, Columbia, the University of Chicago, the University of Pennsylvania, and the University of Wisconsin developed influential publicity offices with the intention to spread the institutions’ fame and to attract students and donors.⁴⁰

Public relations practitioners, like fund-raising professionals, seek to communicate messages to their key publics and receive message back from those publics, in the form of two-way communication. Fund raising needs to encompass the same planning and communication process.

Fund-raising professionals use a form of the two-way communication model: the two-way asymmetric model, also known as the persuasion model. Public relations authors Don Bagin and Anthony Fulginiti (2005) define this model in the following way.

Organization communicates with its publics to learn the most efficacious

³⁸ Hunt, Todd and James E. Grunig. Public Relations Techniques. Forth Worth: Harcourt Brace College Publishers, 1994: 5-6.

³⁹ Smith, Ronald D, APR. Strategic Planning for Public Relations. Mahwah: Lawrence Erlbaum Associates: 2005. 347.

⁴⁰ Kotler, Philip and Karen F.A. Fox: 356.

messages and channels to use with them in a persuasion campaign. The organization beams back what it discovered to gain positive public opinion compliance from important publics.⁴¹

The process of public relations revolves around researching and planning strategically for unexpected situations that require reactive responses. More specifically, Allen H. Center and Patrick Jackson (2005) developed the four-step Public Relations Process for practitioners to follow while devising a campaign.

The Public Relations Process

1. Fact finding and data gathering, often including formal research, to define clearly the specific problem or opportunity.
2. Planning and programming to devise and package a strategy.
3. Action and communication to implement the strategy.
4. Evaluation to determine reaction to decide what, if anything, to do next or differently.⁴²

Tromble (1998) writes that the public relations office at a higher education institution is responsible for serving as the mirror that reflects that which already exists, a mirror that focuses on strengths and qualities that can be easily communicated externally and internally.⁴³

All public relations planning must identify these key targets (publics) in order to best determine the best objectives and strategies to deliver the organization's key messages. Austin and Pinkleton (2001) describe the process of segmentation as the ability to identify and prioritize the key publics. The key

⁴¹ Bagin, Don and Anthony Fulginiti. Practical Public Relations Theories and Practices That Make a Difference. Dubuque: Kendall/ Hunt Publishing Company. 2005,p.2-3.

⁴² Center, Allen H. and Patrick Jackson. Public Relations Practices, Managerial Case Studies and Problems Fifth Edition. Upper Saddle River: Prentice Hall, 1995. p-14-15.

⁴³ Tromble, William A. 2002: 283.

publics then are subcategorized into stakeholders are individuals who can benefit and maintain a mutually beneficial relationship with the organization. These publics are then broken down by characteristics such as: demographics, psychographics, sociographics, behaviors and communication behaviors.⁴⁴

Smith's (2005) model for strategic planning "The Nine Steps of Strategic Public Relations" is grouped into four phases⁴⁵:

Nine Steps of Strategic Public Relations Planning

Phase One: Formative Research

- Step 1: Analyzing the Situation
- Step 2: Analyzing the Organization
- Step 3: Analyzing the Publics

Phase Two: Strategy

- Step 4: Establishing Goals and Objectives
- Step 5: Formulating Action and Response Strategies
- Step 6: Using Effective Communication

Phase Three: Tactics

- Step 7: Choosing Communication Tactics
- Step 8: Implementing the Strategic Plan

Phase Four: Evaluative Research

- Step 9: Evaluating the Strategic Plan

The overall delivery of the public relations message shapes the views and overall impression of the institution's donors and supporters. Donors want to see an institution which represents commitment and excellence in academics. An institution's primary publics are those that it relates to on an active and continuous basis- its students, donors, faculty and staff, trustees, and the

⁴⁴ Austin, Erica Weintraub and Bruce E. Pinkleton. Strategic Public Relations Management: Planning and Managing Effective Communication Programs. Mahwah, : Lawrence Erlbaum Associates. 2001:52-53.

⁴⁵ Smith, Ronald D, APR. 2005. 9.

community... if the goodwill of any of these groups disappears- the institution is in deep trouble. ⁴⁶

⁴⁶ Kotler, Philip and Karen A. Fox: 357.

Chapter III

Research Design

This study includes both quantitative and qualitative research methods that examine fund-raising professionals from four-year public and private colleges and universities in the United States.

The quantitative research for this study was obtained by administering a descriptive mail survey to advancement officers of colleges and universities. The sample used consisted of 124 schools that were ranked as the “Best National Universities” by U.S. News and World Report: 2006 Edition America’s Best Colleges. The sample included all of the 124 public and private colleges and universities listed in the first tier ranking of the “Best National Universities.” Out of the survey sample (Appendix A), 108 surveys were mailed directly to individuals, while 16 were mailed to Vice Presidents for Advancement/ Development.

The qualitative research involved a personal interview with Dr. Robert Walker, Vice President for Development at Texas A&M University, in College Station, Texas.

Instruments

Quantitative

The author developed the questionnaire (Appendix B) instrument to examine the overall planning and tactics used by the nation’s advancement professionals in establishing a strong alumni donor base.

The instrument contained 11 multiple choice, Likert scale and open-ended questions. The first portion consisted of multiple choice responses that asked the participant mutually exclusive questions to determine their: years of experience in fund raising, the amount of time in that current position and the amount of time at their current institution. The fifth question asked participants to rank order donor bases. The sixth multiple choice question asked participants to identify a point in which they recommend beginning the process of asking for alumni donations.

Questions seven and eight used Likert scale to determine the frequency of use of specified strategies in obtaining alumni support from undergraduate students and the effectiveness of these strategies. Question nine used a Likert scale to rate the specified strategies from very important to not important in respect to the actual role and the ideal role their respective institution play in obtaining alumni support. Question ten of the survey used a Likert scale to rate the effectiveness of the strategies with their current alumni donor base. Question eleven, an open ended question, asked respondents to provide a general impression of what they believe to be the most important aspect in cultivating a relationship with their alumni donor base.

Qualitative

The one-on-one personal interview was done over the phone and conducted by the author and audio taped. The structured interview contained a series of open-ended questions to gain better insight into the career of a fund-raiser, the planning of a large institution like Texas A&M University's fund-raising campaign and the way the university develops its relationships with their alumni.

The author consulted research techniques described by Roger D. Wimmer and Joseph R. Dominick's Mass Media Research an Introduction for both the quantitative and qualitative research.

Procedures

Quantitative

The author researched each of the 124 schools listed in the first tier of "Best National Universities" by U.S. News and World Report: 2006 Edition America's Best Colleges and obtained the name of the chief development/advancement officer. Any school in which the chief development/ advancement officer was not specified on its web site, the author attempted to contact the school to determine the proper individual. Of the 124 schools, the author was unable to determine 16 of the chief development/ advancement officer, so those surveys were mailed to the attention of the Vice President for Advancement/ Development. Each survey was coded, in order to determine which school responded. Surveys, along with an accompanying letter (Appendix C), were sent to each individual. Each survey also contained a pre-paid postage return envelope. Two weeks after the date of the initial mailing, the author sent out a second mailing, which contained a cover letter (Appendix D), a survey and a pre-paid postage return envelope.

Using guidelines established by Dominick and Wimmer, a different color paper was used for the questionnaire (tan in the first mailing and blue in the second) and stamped outgoing postage was used to increase response rate.¹ A 30 percent response rate was initially anticipated. Respondents remained anonymous and results only

¹ Dominick, Joseph R. and Roger D. Wimmer. Mass Media Research an Introduction. Belmont: Wadsworth Publishing Company: 2000. p.161-190.

included reporting group data. Eighty of the 124 surveys were returned, which concluded the study with a 64.5 percent response rate. The first mailing yielded 63 responses and 17 from the second mailing.

Qualitative

The author interviewed Dr. Robert Walker of Texas A&M University. Dr. Walker currently serves as Vice President for Development for the university. Dr. Walker's vast expertise in the field of higher education fund raising made him an invaluable resource for this study.

Dr. Walker graduated with a bachelor's degree in marketing from Texas A&M University. He then went to work at Pepperdine University for ten years, during which time he held the positions of Director of Annual Giving and Alumni Director. While at Pepperdine he received his master's in education. Dr. Walker returned to Texas A&M and headed the annual giving program for six years. Then in the early 1970s he began to work for the university's foundation, in capital fund raising. While at Texas A&M, Dr. Walker earned his Ph.D. in Education Administration and has been teaching graduate and doctoral level courses in fund raising for over 17 years.

Data Analysis

The researcher tabulated the 80 surveys that were returned. Only questions that were answered completely and correctly were used in the final response of each question. The researcher analyzed and grouped the responses from the phone interview with the Dr. Walker.

Chapter IV

Results

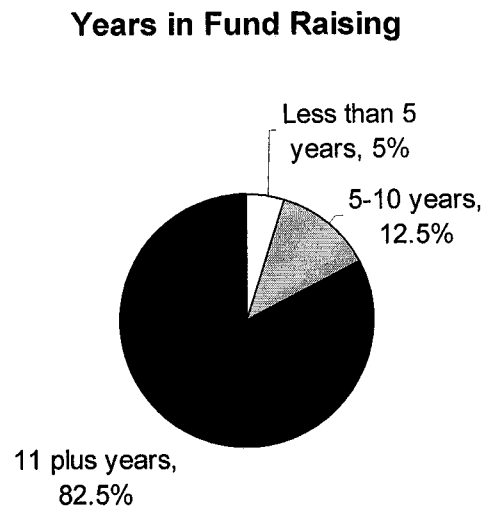
Survey Results

One hundred and twenty-four surveys were sent by first class mail to the schools selected to be included in the survey. One hundred and eight of the surveys were mailed directly to individuals, while 16 were mailed to Vice Presidents for Advancement/Development. Eighty usable surveys were returned, giving this study a response rate of 64.5 percent. Of the 80 that were usable, 11 were included from the surveys mailed without named individuals. Three respondents declined involvement in the study. Four additional surveys were returned, however were not used because they were received after the results were tabulated.

Questions one, two, three and four had 80 of the 80 participants correctly respond. Question five 76 of the eight participants correctly respond. Questions six had 69 of the 80 participants correctly respond. Question seven and eight had 75 of the 80 participants correctly respond. Question nine had 77 of the 80 participants respond correctly. Question ten had 78 of the 80 participants respond correctly.

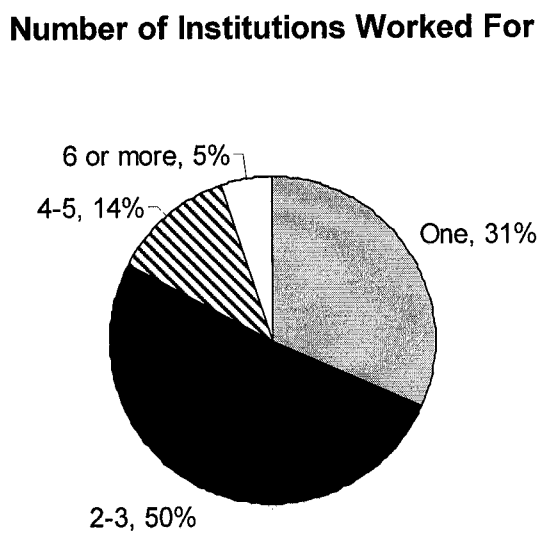
Question 1: How many years have you been working in fund raising?

Figure 2



Question 2: How many higher education institutions have you worked for as a fund raising professional?

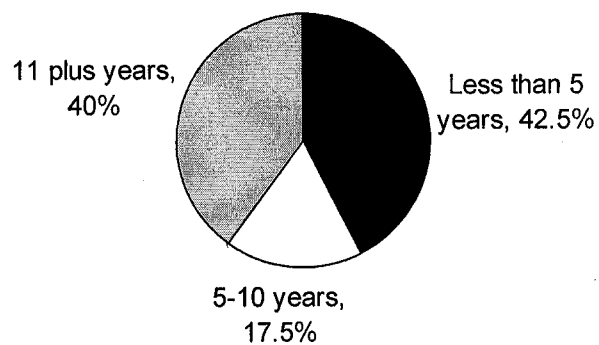
Figure 3



Question 3: How long have you been at your current institution?

Figure 4

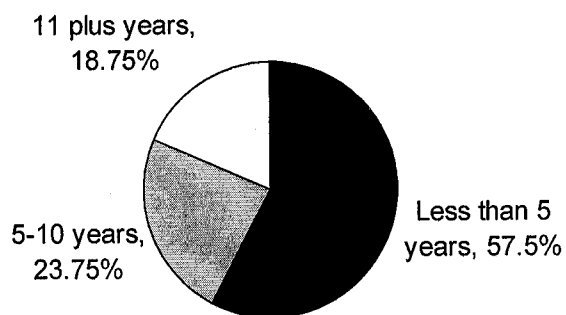
How long have you worked at your current institution?



Question 4: How long have you been in your current position?

Figure 5

How long in your current position?



Question 5: Rank the following key donor base in order of importance (1) being most important to (5) being least important to your institution's fundraising campaign:

Figure 6

Key Donor Base Ranking: Alumni

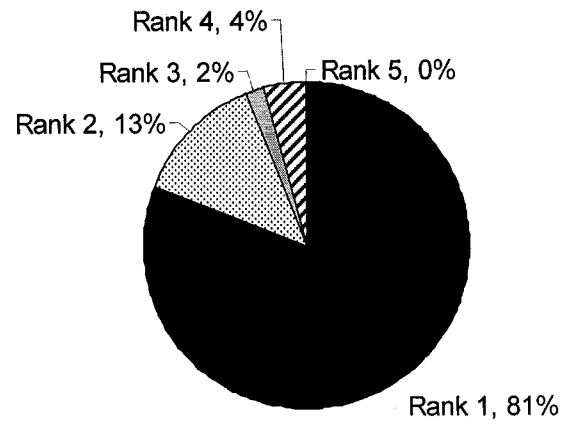


Figure 7

Key Donor Base Ranking: Corporations

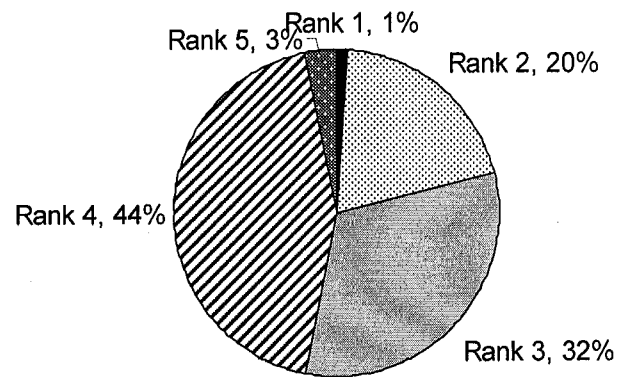


Figure 8

Key Donor Base Ranking: Foundations

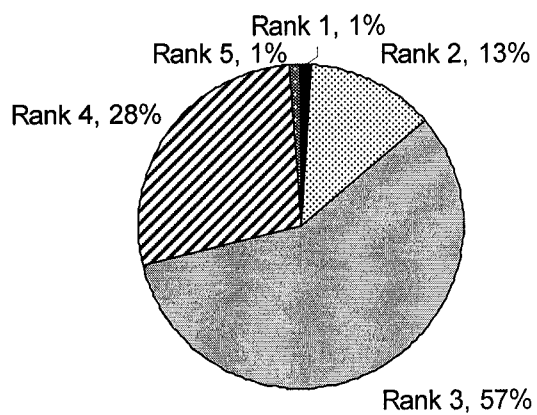


Figure 9

Key Donor Base Ranking: Individuals

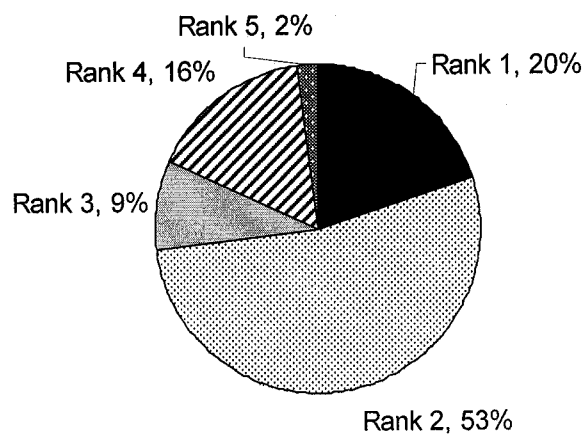


Figure 10

Key Donor Base Ranking: Other

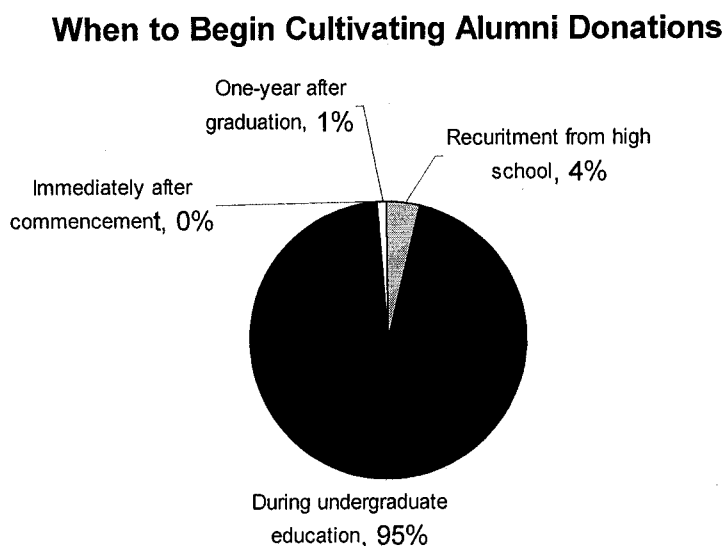
	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
Parents	0%	1%	0%	5%	8%
Associations	0%	0%	0%	0%	3%

Religious Organizations	0%	0%	0%	0%	1%
Organizations	0%	0%	0%	0%	3%
Agencies/Groups	0%	0%	0%	1%	0%
Friends/Media	0%	0%	0%	0%	1%

* 24% of those who responded to this question ranked a specified "other."

Question 6: At what point do you recommend beginning the process of cultivating alumni donations?

Figure 11



Question 7: Please rate the following strategies (1) never use to (3) frequently use in communicating the need for alumni support with your **undergraduate students**:

Figure 12

Involvement with alumni on-campus activities	(1) Never Use (2%)	(2) Sometimes Use (35%)	(3) Frequently Use (63%)
Developing key relationships with staff and/or academic departments	(1) Never Use (4%)	(2) Sometimes Use (36%)	(3) Frequently Use (60%)
Cultivating potential donor relations with students through campus organizations	(1) Never Use (8%)	(2) Sometimes Use (53%)	(3) Frequently Use (39%)
Developing relationships with family/parents of current students	(1) Never Use (4%)	(2) Sometimes Use (32%)	(3) Frequently Use (64%)

Question 8: Please rate the effectiveness of these strategies (1) disagree to (5) not applicable in communicating the need for alumni support with your **undergraduate students**:

Figure 13

Involvement with alumni on-campus activities	(1) 0% Disagree	(2) 0% Somewhat Disagree	(3) 25% Somewhat Agree	(4) 74% Strongly Agree	(5) 1% Not Applicable
Developing key relationships with staff and/or academic departments	(1) 1% Disagree	(2) 3% Somewhat Disagree	(3) 27% Somewhat Agree	(4) 68% Strongly Agree	(5) 1% Not Applicable
Cultivating potential donor relations with students through campus organizations	(1) 1% Disagree	(2) 4% Somewhat Disagree	(3) 44% Somewhat Agree	(4) 48% Strongly Agree	(5) 3% Not Applicable
Developing relationships with family/parents of current students	(1) 0% Disagree	(2) 3% Somewhat Disagree	(3) 19% Somewhat Agree	(4) 77% Strongly Agree	(5) 1% Not Applicable

Question 9: Please rate the following strategies (1) very important to (3) not important at all in with respect to the **ACTUAL** role your institutions plays in obtaining **alumni support** and the **IDEAL** role you believe your institution should play.

Figure 14

ACTUAL

Alumni Events	(1) Very Important 67%	(2) Somewhat Important 29%	(3) Not Important At All 4%
Alumni Publications	(1) Very Important 65%	(2) Somewhat Important 31%	(3) Not Important At All 4%
Involving alumni with undergraduate students	(1) Very Important 53%	(2) Somewhat Important 46%	(3) Not Important At All 1%
Alumni participation in campus organizations	(1) Very Important 43%	(2) Somewhat Important 45%	(3) Not Important At All 12%
Relationships with faculty, staff and/or academic departments	(1) Very Important 70%	(2) Somewhat Important 27%	(3) Not Important At All 3%
Alumni Phone Drives	(1) Very Important 65%	(2) Somewhat Important 30%	(3) Not Important At All 5%

Figure 15

IDEAL

Alumni Events	(1) Very Important 88%	(2) Somewhat Important 12%	(3) Not Important At All 0%
Alumni Publications	(1) Very Important 83%	(2) Somewhat Important 17%	(3) Not Important At All 0%
Involving alumni with undergraduate students	(1) Very Important 83%	(2) Somewhat Important 17%	(3) Not Important At All 0%
Alumni participation in campus	(1) Very Important	(2) Somewhat Important	(3) Not Important At All

organizations	68%	30%	2%
Relationships with faculty, staff and/or academic departments	(1) Very Important 94%	(2) Somewhat Important 6%	(3) Not Important At All 0%
Alumni Phone Drives	(1) Very Important 73%	(2) Somewhat Important 21%	(3) Not Important At All 6%

Question 10: Please rate the effectiveness of these strategies (1) disagree to (5) not applicable in obtaining alumni support with your current **alumni base**:

Figure 16

Alumni Events	(1) 1% Disagree	(2) 7% Somewhat Disagree	(3) 41% Somewhat Agree	(4) 51% Strongly Agree	(5) 0% Not Applicable
Alumni Publications	(1) 1% Disagree	(2) 7% Somewhat Disagree	(3) 41% Somewhat Agree	(4) 51% Strongly Agree	(5) 0% Not Applicable
Involving alumni with undergraduate students	(1) 1% Disagree	(2) 1% Somewhat Disagree	(3) 36% Somewhat Agree	(4) 62% Strongly Agree	(5) 0% Not Applicable
Alumni participation in campus organizations	(1) 4% Disagree	(2) 12% Somewhat Disagree	(3) 50% Somewhat Agree	(4) 33% Strongly Agree	(5) 1% Not Applicable
Relationships with faculty, staff and/or academic departments	(1) 1% Disagree	(2) 4% Somewhat Disagree	(3) 24% Somewhat Agree	(4) 71% Strongly Agree	(5) 0% Not Applicable
Alumni Phone Drives	(1) 3% Disagree	(2) 5% Somewhat Disagree	(3) 32% Somewhat Agree	(4) 60% Strongly Agree	(5) 0% Not Applicable

Question 11: In a few shorts words, please provide me with a general impression what you believe to be the most important aspect in cultivating a relationship with your alumni donor base:

Twenty-three percent of respondents identified communication with their alumni to be the most important aspect of cultivating the relationship. Below is a sample of some of the answers:

- “Communicating with alumni the vision of the university, what it will take for us to get there, and the role they can play to help us. It has to be specific, concise, and yet allow for various involvement opportunities.”
- “Communicating the university’s successes and needs to alumni, asking for the gift and then providing good stewardships for that gift builds a good alumni donor base.”

Eighteen percent of respondents identified the ability for the institution to ask the alumnus as the most important aspect of cultivating a relationship of giving. Below is a sample of answers:

- “Making the ‘ask’ is important. Many alumni feel they haven’t been asked.”
- Showing “that we care about the donor, not just the money”
- “Making the donor feel that his/ her gift is important while the university is in the middle of a multi million dollar campaign.”

Thirteen percent of respondents specified that their alumni needed to feel that they received a quality education, while there as a student, for there to ever be a gift once they are an alumnus. Below is a sample of some answers provided:

- “A fabulous experience as students both in the class and outside the classroom.”
- “Serve them when they are students on campus.”
- “Start as early as possible-well before they have been admitted. Then make sure to continue the relationship well after they graduate.”
- “A positive student experience is the single most important factor.”

Finally, some of the fund-raisers identified the overall mission of their institution’s fund-raising. Below is a sample of those answers:

- “Making their alma mater relevant in their lives, demonstrating how maintaining contort and involvement with their alma mater is mutually beneficial and worthwhile. Invite them as full partners in enabling the university to have positive impact on students and the world.”
- “Alumni who are consistently involved with the university in any way – volunteer leadership, attending campus cultural and athletic events, reading our publications- are most likely to give our primary strategy is to keep them involved.”
- “Most important aspect in cultivating a relationship is personal contact with the professional staff member. This person must be able to listen and hear the donors’ wishes and effectively match those with the institutional needs. This can only be achieved at the highest money level if there is strong personal trust between the donor and the professional.”
- “Connecting all of the below:
Students – Alumni – faculty- supporters- alumni relations- annual fund-to major gifts- good stewardship for all.”

Interview Results

The researcher conducted the phone interview with Dr. Robert Walker of Texas A&M University took place on April 10, 2006 at 3 p.m. Below are the findings from that interview:

Question 1: What do you feel makes a successful fund-raiser?

Dr. Walker specifically identified key skills he looks for when hiring a fund-raiser: communication skills, writing skills, articulation and the ability to deal with people one on one. He has hired people from every type of background and different degrees, but “if they don’t have the personality and those communication skills, they are not successful.”

Question 2: Does your institution strategically plan to begin cultivating the relationship of alumni giving with your undergraduate students?

According to Dr. Walker, Texas A&M University introduces its undergraduate students to its alumni organization (The Association of Former Students) from day one. Incoming freshmen are first introduced at freshman orientation (Texas A&M University’s FISH Camp).

Question 3: Texas A&M has a freshman orientation program called ‘FISH Camp,’ please tell me about that program and what benefit it provides to your fund-raising program?

Dr. Walker describes the freshman orientation program, “FISH Camp,” as very important to the institution, which generally includes upwards to 80 percent of each year’s incoming freshman. He stated “this is where they teach them all about our traditions and various aspects of what it means to be part of our A&M student body. One of our alumni officers goes to speak at each camp.”

Question 4: What strategies do you find effective communicating your institutions need for alumni support, while they are undergraduate students?

Dr. Walker specifically identified four of Texas A&M University’s strategies for alumni support: student use of the alumni facility (The Clayton W. William Alumni Center), the senior year induction banquet, their alumni publication (The Texas Aggie) and the class gift.

Something the researcher found very unique was the class gift. Each class makes an appeal to the graduating students to donate the deposits they would generally receive

back in the form of refunds (dorm room or lab fees). Dr. Walker explained “they appeal to them to make that (refund) their first gift.”

Question 5: When do you expect an alumnus’s first post commencement gift?

According to Dr. Walker, Texas A&M expects the first post commencement gift within a year. He believes the best triggering point “is when they get a notice that this Texas Aggie Magazine, which they have been getting free, will not be renewed unless they make their first annual gift. In other words, they have gotten this magazine... and they don’t want to give that up usually.”

Question 6: What is your measure for the success of your annual giving?

Dr. Walker explained the importance of the university in reaching the annual giving goal: seven million dollars. This means unrestricted dollars: monies that cannot be restricted to one department or college. The unrestricted dollars are used for “scholarships, funds for the deans, funds for department heads, teaching excellence awards and unrestricted funds for the President.”

Question 7: What significant changes have you seen in the field of advancement in higher education during the course of your career?

Dr. Walker identified two significant changes in the field of advancement: the fracturing of donations by the donor and annual dues. Dr. Walker sees more individual fund-raising campaigns within the annual fund than there used to be and “in many universities around the country I have noticed they have fractured their total alumni base, and divided it up over colleges, sororities and fraternities.” Another change he mentions is the use by some institutions of annual dues, which he believes limits the donation. Also, “dues are not (tax deductible) and annual gifts are. So I think you have seen a lot of people get away from the annual dues program, which in my opinion is healthy.”

Question 8: How do you develop alumni into lifetime donors and then transition into estate giving/ capital gifts?

Dr. Walker states as a fund-raiser you want to see your “constituents make a capital gift either during their lifetime or at the end of it.” Texas A&M University begins actively cultivating 25 years after graduation. However, “you find people may not have been very good at annual giving, but contact us and want to talk, and they become a very large major gift donor. Somehow or another then never cultivated the annual giving habit.”

Chapter V

Summary

The researcher surveyed 124 institutions, which yielded 80 responses, from top fund-raising officers of the nation's top colleges and universities. The goal of this study was to identify key effective strategies in obtaining alumni donors. This study's finding included: fund-raisers determine their alumni donor base to be the most important donor base, the majority of fund-raisers recommend beginning to cultivate a relationship of giving during students' undergraduate education, developing relationships with staff/ departments and parents/ families of current students were the most frequently used and effective strategies in obtaining alumni support, involving alumni with undergraduate students is the most effective strategy in communicating the need for alumni support with current alumni donor bases and fund-raisers would like to see an increase of importance placed on their fund-raising strategies by their institution.

Hypotheses

H1 The majority of fund-raisers rank their alumni donor base as the most important donor base.

The researcher confirmed this hypothesis with the survey results of question five from the study. The question asked each respondent to rank the provided donor bases (alumni, corporations, foundations, individuals and other) in order of importance (1) being most important to (5) being least important to their institution's fund raising campaign. The researcher found 81 percent of those surveyed ranked the *alumni* donor base as being their most important in their fund raising campaign.

H2 The majority of institutions begin cultivating alumni donations one-year post graduation.

The researcher investigated this hypothesis with the results of question six on the survey instrument. Participants were asked to specify the time in which they recommend beginning the process of cultivating alumni donations. They were given four time periods to chose from: recruitment from high school, during undergraduate education, immediately after commencement and one-year post graduation.

The hypothesis was disproved with 95 percent of participants recommending beginning cultivating alumni donations *during undergraduate education*. Only 1% recommended *one-year post graduation*.

H3 Strategies of developing key relationships with staff and/or academic departments and developing relationships with family/parents of current students are the most frequently used, and most effective, in communicating the need for alumni support with undergraduate support.

The researcher adequately verified this hypothesis by analyzing the survey responses to questions number seven and eight on the survey. Question seven asked respondents to rate strategies (1) never use to (3) frequently use in communicating the need for alumni support with their undergraduate students. Question eight asked participants to rate the effectiveness of the same strategies (1) disagree to (5) not applicable in communicating the need for alumni support with their undergraduate students.

A total of 60 percent of participants stated they frequently use the strategy of *developing key relationships with staff and/or academic departments* to communicate

with undergraduate students the need for alumni support, while 95 percent of those surveyed found the strongly agreed or somewhat agreed the strategy was effective.

A total of 64 percent of participants stated they frequently use the strategy of *developing relationships with family/parents of current students* to communicate with undergraduate students the need for alumni support, while 96% of those surveyed found the strongly agreed or somewhat agreed the strategy was effective.

However, a large percentage of respondents (63 percent) also frequently used the strategy of *involvement with alumni-on campus*, and 99 percent strongly agreed or somewhat agreed in the effectiveness of the strategy.

The researcher also notes that even though only 39 percent reported in frequent use of *cultivating potential donor relations with students through campus organizations*, most (92 percent) strongly agreed or somewhat agreed that it was effective.

H4 Strategies of developing key relationships with staff/ departments and alumni participation on campus are the most effective in communicating the need for alumni support with their current alumni donor base.

The researcher disproved this hypothesis that the strategies of *developing key relationships with faculty, staff and/or academic departments* and *alumni participation in campus organizations* are the most effective in communicating the need for alumni support with their current alumni support. Questions ten in the survey asked survey participants to rate the effectiveness of strategies from (1) disagree to (5) not applicable in obtaining alumni support with their current alumni base. The strategies listed included the following: alumni events, alumni publications, involving alumni with undergraduate

students, alumni participation in campus organizations, relationships with faculty, staff and/or academic departments and alumni phone drives.

The initial hypothesis was incorrect in that majority of fund-raisers would strongly agree or somewhat agree that *developing key relationships with staff/departments* is an effective strategy, with 95 percent of those surveyed responding with strongly agree or somewhat agree in the effectiveness of the strategy. However, the majority of respondents (98 percent) strongly agreed or somewhat agreed in the effectiveness of *involving alumni with undergraduate students*. And the hypothesis was also disproved with the lowest amount of participants (83 percent) responding strongly agree or somewhat agree with the strategy of *alumni participation in campus organizations*.

H5 Fund-raising officers in higher education place a high value on strategic planning.

The researcher proved this hypothesis with the results of question nine in the study. The participants were asked to rate strategies (1) very important to (3) not important all. The strategies included: alumni events, alumni publications, involving alumni with undergraduate students, alumni participation in campus organizations, relationships with faculty, staff and/or academic departments and alumni phone drives. The first portion of the questions asked participants to rank the strategies on the 'actual' importance level their institution places on the strategy, while the second portion of the question asked participants to rate the same strategies on the 'ideal' role level of importance they believe their institution should place on the strategy.

In every strategy the respondents 'ideal' importance rating was higher than their 'actual' rating, proving that fund raisers would like to see change in the importance placed on strategies by their the institutions.

A total 67 percent of those surveyed responded that *alumni events* were considered very important by their institution, while 88 percent ideally ranked *alumni events* as very important. A total of 65 percent of those surveyed responded that *alumni publications* were considered very important by their institution, while 83 percent ideally ranked *alumni publications* as very important. The study found 53 percent of those surveyed responded that *involving alumni with undergraduate students* were considered very important by their institution, while 83 percent ideally ranked *alumni events* as very important. A total of 43 percent of those surveyed responded that *alumni participation in campus organizations* were considered very important by their institution, while 68% ideally ranked *alumni participation in campus organizations* as very important. A total of 70 percent of those surveyed responded that *relationships with faculty, staff, and/or academic departments* were considered very important by their institution, while 94% ideally ranked *relationships with faculty, staff and/or academic departments* as very important. Finally, 65 percent of those surveyed responded that *alumni phone drives* were considered very important by their institution, while 73 percent ideally ranked *alumni phone drives* as very important.

The researcher then concluded, based off of these results, that respondents most idealized that their institution would place more value on the use of *involving alumni with undergraduate student*. There was a 30 percent increase from respondents ranking this strategy in 'actual' terms versus 'ideal.'

Research Questions

RQ1 What recent changes have occurred in the field of advancement, which then affects the alumni donor base?

The researcher addressed this question during the personal interview with Dr. Robert Walker of Texas A&M University. The researcher specifically asked Dr. Walker what significant changes he noticed in the field of higher education advancement during the span of his 48 year-old career.

Dr. Walker highlighted a fracture in the fund-raising structure, in which institutions are volleying for alumni donations between university organizations and departments, instead of the funds being directed to the university or college in the form of annual funds to be directed where the university sees fit.

Dr. Walker also raised the issue that many institutions raise funds by charging dues. While the initial theory behind annual dues is that it consistently brings in funding, it also limits the possible size of the alumnus's gift. The gift also does not benefit the alumnus, for annual dues do not provide a tax benefit.

RQ2 What is the most important aspect in obtaining alumni support?

All in all, most of the respondents of question 11 in the survey mentioned the need for communication being the most important aspect of obtaining alumni support. Whether it be in the ability of the organization being able to communicate the need for support, the mission and goals of the institution, targeting the correct messages to the correct audiences or communicating the sincerity in relationship building between the institution and the individual alumnus. This is where public relations practices and

theories can aid and benefit a fund-raiser's ability in communicating their messages to their audiences.

Research Process: Strengths and Weaknesses

The researcher initially expected a rate of return of 30 percent on the 124 surveys that were sent out. The final rate of return was 65 percent, which significantly increased the validity and reliability of the study. Participants were very helpful and the response of prompt.

The researcher found that the wording in question six in which they were asked to recommend when to begin the process of cultivating alumni donations alluded to a professional recommendation rather than the time period they may actually begin cultivating alumni donations. Instead, the researcher feels that the questions should have asked participants to state when they actually begin cultivating alumni donations.

Delphi Study

In October 2005 the researcher conducted a Delphi study of development officers of eight of the nine New Jersey state colleges and universities and 14 of New Jersey's independent four-year colleges. The study excluded Rowan University, due to the study being endorsed by Dr. Philip Tumminia, Executive Vice President of University of Advancement for Rowan University, in Glassboro, New Jersey.

Participants were sent letters two weeks prior to when the Delphi study began; the mailing included an endorsement letter from Dr. Philip Tumminia and a letter from the researcher explaining the Delphi study. The study was to consist of three rounds of questions. The questions were administered by e-mail. In the first round they were asked to list all effective strategies they use at their institution to establish a relationship with

their undergraduate students to become donating alumni. The researcher then compiled a list of the responses, and asked respondents to then (for the second round) rank the list from most effective to least effective. For the third round, participants would then have been asked to choose the top ten responses, in rank order, from the list and make comments.

The initial mailing had one response, declining participation in the study. After the first round, the researcher received only three responses from the 22 total schools asked to participate. A second e-mail was sent, along with an attachment of the initial mailing, to entice the development officers to participate. This did not yield any further responses.

Although the researcher was unable to continue the Delphi study, due to lack of participants, the responses from the three initial respondents did help in developing the questionnaire for the national survey. The researcher also then chose to study the vice presidents and vice chancellors in the national study. The researcher felt that the development officers from the New Jersey institutions might not have been involved with fund-raising at the strategic level, but rather at the tactical level, which made them less inclined to participate.

Conclusion

The researcher has identified three key areas for further research. First, the researcher believes an entire study into the fracture in fund-raising, as identified by Dr. Robert Walker, in higher education's fund-raising structure would be a very significant study for the field. Second, the researcher believes further studies into specific fund-

raising strategies could prove very beneficial. This study may best be executed by using one school as a case study and tracking its fund raising progress over a period of time, while testing specific strategies and their effectiveness. The researcher feels further study into what makes certain fund-raisers more successful in their efforts could prove helpful.

This study helped identify key public relations strategies used by the nation's top colleges and universities in developing a relationship of alumni support with their undergraduate students. The identification of these strategies enables fund-raisers and public relations officers of colleges and universities to evaluate their fund-raising campaigns and the messages they communicate with their alumni donor base.

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Appendix A

First Tier: Best National Universities
U.S. News and World Report: 2006 Edition America's Best Colleges

Harvard University
Princeton University
Yale University
University of Pennsylvania
Duke University
Stanford University
California Institute of Technology
Massachusetts Institute of Technology
Columbia University
Dartmouth College
Washington University in St. Louis
Northwestern University
Cornell University
John Hopkins University
Brown University
University of Chicago
Rice University
University of Notre Dame
Vanderbilt University
Emory University
University of California – Berkeley
Carnegie Mellon University
Georgetown University
University of Virginia
University of California- Los Angeles
University of Michigan-Ann Arbor
Tufts University
The University of North Carolina at
Chapel Hill
Wake Forest University
University of Southern California
College of William and Mary
Lehigh University
University of California- San Diego
Brandeis University
University of Rochester
University of Wisconsin

Case Western Reserve University
Georgia Institute of Technology
New York University
Boston College
University of California – Irvine
University of Illinois- Urban Champaign
Rensselaer Polytechnic Institute
Tulane University
University of San Diego
University of California - Santa Barbara
University of Washington
Yeshiva University
Pennsylvania State University
University of California- Davis
Syracuse University
University of Florida
University of Texas
Worcester Polytechnic Institute
George Washington University
Pepperdine University
University of Maryland
University of Miami
University of Georgia
University of Pittsburgh
Ohio State University
Purdue University
Rutgers University
Texas A &M University
Boston University
University of Iowa
Miami University- Oxford
University of Delaware
University of California- Santa Cruz
Fordham University
University of Connecticut
Southern Methodist University
Stevens Institute of Technology
Brigham Young University
Michigan State University
SUNY- Binghamton University
University of Minnesota-Twin Cities
Indiana University of Bloomington
Baylor University
Clemson University
North Carolina State University
St. Louis University

Virginia Tech
University of Colorado
Clark University
Marquette University
University of California- Riverside
University of Denver
University of Missouri-Columbia
Auburn University
University of Tennessee
American University
Iowa State University
Howard University
SUNY- ESF
University of Tulsa
University of Vermont
Illinois Institute of Technology
SUNY- Stony Brook
Texas Christian University
University of Arizona
University of Nebraska- Lincoln
University of Kansas
University of New Hampshire
University of Alabama
University of Massachusetts- Amherst
University of the Pacific
University of Dayton
Drexel University
The Florida State University
Ohio University
University of Missouri- Rola
University of Oklahoma
University of South Carolina-Columbia
Northeastern University
University of Oregon
University of San Francisco
Loyola University- Chicago
University of Buffalo
Colorado State University
University of Kentucky
University of Utah
Washington State University
Catholic University of America

Appendix B

Fund Raising Survey

1. How many years have you been working in fundraising?
☐ Less than 5 years
☐ 5-10 years
☐ 11 plus years
2. How many higher education institutions have you worked for as a fundraising professional?
☐ one
☐ 2-3
☐ 4-5
☐ 6 or more
3. How long have you been at your current institution?
☐ Less than 5 years
☐ 5-10 years
☐ 11 plus years
4. How long have you been in your current position?
☐ Less than 5 years
☐ 5-10 years
☐ 11 plus years
5. Rank the following key donor base in order of importance (1) being most important to (5) being least important to your institution's fundraising campaign:

_____	Alumni
_____	Corporations
_____	Foundations
_____	Individuals
_____	Other: (please specify) _____
6. At what point do you recommend beginning the process of cultivating alumni donations?
☐ Recruitment of student from high school
☐ During undergraduate education

- () Beginning immediately after commencement
 () One- Year after graduation

7. Please rate the following strategies (1) never use to (3) frequently use in communicating the need for alumni support with your **undergraduate students**:

Involvement with alumni on-campus activities	(1) Never Use	(2) Sometimes Use	(3) Frequently Use
Developing key relationships with staff and/or academic departments	(1) Never Use	(2) Sometimes Use	(3) Frequently Use
Cultivating potential donor relations with students through campus organizations	(1) Never Use	(2) Sometimes Use	(3) Frequently Use
Developing relationships with family/parents of current students	(1) Never Use	(2) Sometimes Use	(3) Frequently Use

8. Please rate the effectiveness of these strategies (1) disagree to (5) not applicable in communicating the need for alumni support with your **undergraduate students**:

Involvement with alumni on-campus activities	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Developing key relationships with staff and/or academic departments	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Cultivating potential donor relations with students through campus organizations	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Developing relationships with family/parents of current students	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable

9. Please rate the following strategies (1) very important to (3) not important at all in with respect to the ACTUAL role your institutions plays in obtaining **alumni support** and the IDEAL role you believe your institution should play.

ACTUAL:

Alumni Events	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni Publications	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Involving alumni with undergraduate students	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni participation in campus organizations	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Relationships with faculty, staff and/or academic departments	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni Phone Drives	(1) Very Important	(2) Somewhat Important	(3) Not Important At All

IDEAL:

Alumni Events	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni Publications	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Involving alumni with undergraduate students	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni participation in campus organizations	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Relationships with faculty, staff and/or academic departments	(1) Very Important	(2) Somewhat Important	(3) Not Important At All
Alumni Phone Drives	(1) Very Important	(2) Somewhat Important	(3) Not Important At All

10. Please rate the effectiveness of these strategies (1) disagree to (5) not applicable in obtaining alumni support with your current **alumni base**:

Alumni Events	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Alumni Publications	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Involving alumni with undergraduate students	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Alumni participation in campus organizations	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Relationships with faculty, staff and/or academic departments	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable
Alumni Phone Drives	(1) Disagree	(2) Somewhat Disagree	(3) Somewhat Agree	(4) Strongly Agree	(5) Not Applicable

11. In a few short words, please provide me with a general impression what you believe to be the most important aspect in cultivating a relationship with your alumni donor base:

☐ **PLEASE CHECK THIS BOX IF YOU WOULD LIKE A COPY OF THE RESULTS PROVIDED TO YOU BY E-MAIL OR MAIL:** *Please provide an e-mail address or office mailing address below.*

- **E-Mail:**
- **Mailing address:**

Thank you!

Appendix C

First Letter to Participants

Dear Sir or Madam:

Hello, I am Heather Sheridan, a graduate student studying Public Relations at Rowan University in Glassboro, New Jersey. I am conducting a study of effective strategies used by fundraising professionals in higher education to foster a relationship of alumni giving.

My study consists of surveying all of the primary fundraisers at the nation's best colleges and universities, as highlighted in U.S. News & World Report's America's Best Colleges 2006. Attached you will find the eleven questions survey instrument. Please take the time to complete the survey and return it in the pre-paid return envelope.

Your participation in the study will benefit fundraisers nationwide by identifying strategies to better target their alumni donor base. Only the 124 institutions ranked in the top tier "Best Colleges" are being surveyed, making your participation essential to the creditability of the study. **This survey is anonymous and only group data will be included in reporting results.** Please feel free to contact me with any concerns in regards to this study. I thank you for your time and anticipated participation!

Sincerely,

Heather A. Sheridan

