FINDING AN ACADEMIC HOME FOR FUNDRAISING: AN EXPLORATORY STUDY OF SCHOLARS' PERSPECTIVES

By

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A THESIS PRESENTED TO THE GRADUATE SCHOOL
OF THE UNIVERSITY OF FLORIDA IN PARTIAL FULFILLMENT
OF THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF ARTS IN MASS COMMUNICATION

UNIVERSITY OF FLORIDA

2009

To my dad, Glenn W. Mack 1953-2001, whose memory still inspires me through the legacy of faith and love he left on earth.
And in honor of my mom, Betsy Mack, who lives out those virtues everyday.

ACKNOWLEDGEMENTS

First and foremost, I would like to thank God for his many blessings and the opportunity to receive an education. I would like to thank my advisor, Dr. Kathleen Kelly; without her expertise on fundraising this project would not have been possible or even conceptualized. After having me as a student, she deserves a pay raise! Also, I would like to thank my committee members, Dr. Janis Page and Dr. Spiro Kiousis for their guidance, helpful advice, and support. I would like to thank Jody Hedge, who is absolutely indispensible to every single graduate student in the College of Journalism and Communications. Jody, none of us could ever thank you enough!

I would like to thank my "academic ally," Jennifer Warmington. I would not have survived grad school without you, those swimming "stress release sessions," or your selfless proofreading. Also, the rest of my classmates: Hyunmin Lee, Minji Kim, Hyunji Lim, Meredith Woods, Jenine Spoliansky, Sara Hall, Lauren Hames, and LaKeisha Rodman—I miss you guys already. I would like to thank the very wise doctoral students at the University of Florida for their much needed thesis survival tips and their constant willingness to help out this confused master's student in my time of need!

I thank my many friends who have been so supportive and kind through this process. There are too many of you to mention by name—but all of you gave me the encouragement and love that got me through the last two years.

I thank my uncle, Dave Mack, who edited many drafts of this document and provided me with some humor in the process. Uncle Dave, what would I have done without you?

I would like to thank my sisters: Rebekah, Whitney, Kristen, Paige, and Grayson Mack. Thank you for never taking me too seriously or letting me get away with anything.

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May 2009

Chair: Kathleen S. Kelly
Major: Mass Communication

Currently, the field of fundraising does not have an academic home in higher education. There is a lack of consensus among practitioners and scholars about the major field in which fundraising should be taught and researched. While the debate goes on, fundraising research and formal education suffers. Identifying an appropriate academic home will benefit fundraising practice, advance scholarship, and strengthen America's nonprofit sector.

This exploratory study represents one of the first steps in solving this problem. The study was based on Kelly's (1991; 1998) theory of fundraising as a specialization of public relations. In-depth interviews were conducted with 15 scholars who had published articles on fundraising in one or more of the three major nonprofit management and philanthropy journals from 2000 through 2007. Findings showed there is no consensus among scholars about whether fundraising belongs in public relations, marketing, or nonprofit management. However, marketing was the discipline mentioned most often by scholars participating in this study.

CHAPTER 1
PURPOSE OF THE STUDY

In what academic discipline should fundraising find its home? That is the question that prompted this study; up to this point it has not been answered. Fundraising is crucial to the well-being of America's nonprofit sector and must have a home in which it will be studied and taught. To better understand the problem, this chapter discusses the high demand for fundraisers, the need for fundraising education, the shortage of theory and research on fundraising, the need to build theory and research, the lack of consensus among scholars and practitioners regarding an academic home for fundraising, and the importance of fundraising to society.

Need for Fundraisers

Nationwide, there is a shortage of trained fundraisers who have the ability to solicit major gifts (Hall, 2007b). Universities, health organizations and other types of nonprofit organizations are forced to compete with each other for skilled major gift fundraisers. Because of their scarcity, their positions are some of the highest paid in these organizations (Tempel & Beem, 2002). The demand extends beyond those capable of raising major gifts; fundraisers with skills at all levels are needed by nonprofit organizations. The shortage becomes more serious each year as the nonprofit sector continues to rapidly grow, propelling an increasing demand (Holtzman, 2006). Furthermore, Holzman said fundraising has become more complex because of "stock gifts, capital and endowment campaigns and major gifts" (para. 10). An expanded and well-prepared stream of practitioners is badly needed.

Hall (2007c) said, "The intense competition has led to expensive, time-consuming searches that can take up to a year, high turnover among fund raisers who are being aggressively courted, and escalating salaries that many charities simply cannot afford. As a result, some nonprofit groups are hiring inexperienced or unqualified fund raisers out of desperation" (para.

5). To resolve this situation and avoid what many nonprofit leaders view as a looming crisis, fundraising needs a program of formal education housed in an academic discipline and taught by full-time faculty at colleges and universities.

Need for Education and Training

Fundraising suffers from a lack of a program of formal education for practitioners, which is part of the reason there is a shortage of fulltime fundraisers in the United States (Hall, 2007b). Professional associations such as the Association of Fundraising Professionals (AFP), Association for Healthcare Philanthropy (AHP), and Council for Advancement and Support of Education (CASE) offer training to members through different courses and seminars (Hall, 2007b). While many universities also offer classes in fundraising, these classes are offered in a variety of disciplines without any consensus regarding where the field best fits.

According to Kelly (1998), fundraising education is currently at stage two of Grunig and Hunt's (1984) stages of education. Stage one takes place outside a formal education system, and students are trained as apprentices under experienced practitioners. Stage two means that a field has moved into the formal education system, but skilled practitioners – adjunct faculty – serve as instructors. At stage three, in which public relations is currently positioned (Kelly, 1998), full-time academics are responsible for instruction.

Illustrating the stage-two position of fundraising, the Center on Philanthropy at Indiana University offers courses in fundraising taught by fundraising practitioners ("Center", 2007). New York University (New York, 2002) and Columbia University (Columbia, 2006) – both prestigious institutions – offer fundraising courses as well. New York University lists 32 people on their faculty, yet only one person is a full-time professor, and only five have doctoral degrees (Faculty, 2007). Columbia enlists a 14 person fundraising management faculty, none of which have doctoral degrees, but hold impressive practitioner credentials (Faculty, 2006). AFP is

currently working with an unnamed institution to eventually offer courses in fundraising (Hall, 2007a). However, it does not seem to make sense to offer these courses if an academic home has not yet been determined; a base for theory building and research must be established so that teaching can be informed.

The Nonprofit Academic Center Council (2004) reported that "more than 255 colleges and universities provide at least one class in nonprofit management, including 157 schools that offer at least one course within a graduate department" (para. 3). According to Dolch et al. (2007), 61 schools offer some type of concentration in nonprofit management, housed in a variety of academic units and disciplines: 23 in arts & sciences, 10 in public administration, 6 in business, 1 in business and public administration, and 21 in other units. These programs in nonprofit management offer limited courses focused specifically on fundraising.

Regardless of the disciplines in which they are taught, courses on fundraising are predominately taught by adjunct instructors instead of full-time professors (Hall, 2007a). As recruiter Richard Murray (cited in Hall, 2007a) said of these courses:

> A lot of local universities have an extension course on philanthropy or a specialty within a master's program, and they bring in local fund raisers and nonprofit officials to be their instructors. The teaching often isn't up to par. We see people teaching who couldn't get a job and know nothing about education. I have seen the ones they hire; so often they are just not experts. (para. 3)

Because fundraising courses currently are taught by practitioners rather than tenured or tenure-track faculty, a fundamental problem arises (Kelly, 1998). Adjunct instructors are not obligated, nor are they usually inclined, to develop theory, conduct research, or publish new knowledge on the subjects that they teach. Fundraising cannot progress as a discipline without progress in building theory, conducting research, and accumulating a scientific body of knowledge.

Holly Hall (2007b), who writes for the *Chronicle of Philanthropy*, interviewed several leading practitioners about fundraising education. Abbie von Schlegell, a Williamstown, MA fundraising consultant, stated, “One thing that must happen is more professional education for major-gift officers. There needs to be a much higher level of training” (para. 2).

Similar to public relations, the literature on nonprofit management suggests that fundraisers should receive a liberal arts-based education. This includes the development of communication and management skills, in addition to practical experience in the field (“Curriculum,” 2007a). In 2007, the Nonprofit Academic Centers Council published reports with suggested curricula for undergraduate and graduate education. The curriculum for undergraduates consists of two fundamental parts: understanding the role of the nonprofit/voluntary sector in society, and the leadership and management of nonprofit organizations (“Curriculum,” 2007a). The first part is based on a liberal arts approach and requires courses in comparative perspectives on civil society; voluntary action and philanthropy; foundations of civil society; ethics and values; public policy, law, advocacy and social change; nonprofit governance and leadership; and community service and civic engagement. The second part is designed to develop professional skills and requires courses in nonprofit finance and fundraising; financial management; managing staff and volunteers; nonprofit marketing; assessment, evaluation and decision-making methods; and professional and career development, which is an internship component.

The curriculum for graduate education (“Curriculum,” 2007b) includes courses in comparative perspectives on the nonprofit sector, voluntary action, and philanthropy; scope and significance of the nonprofit sector; history and theories of the nonprofit sector; ethics and values; nonprofit governance and leadership; public policy, advocacy, and social change;

nonprofit law; nonprofit economics; nonprofit finance; fundraising and development; financial management and accountability; leadership, organization and management; nonprofit human resource management; and nonprofit marketing. As evidenced by the courses listed, public relations is notably absent from both curricula, whereas both contain courses in marketing. This may be because many consider public relations to be a part of marketing, not a distinct function. More importantly, both curricula treat fundraising as part of nonprofit management education and separate from both marketing and public relations.

Need for Research and a Body of Knowledge

Kelly (1998) suggested that fundraising lacks a program of formal education "because fund raising, unlike related concepts, emerged solely outside the academy. Training traditionally came from those who practiced the function" (p. 112). Current education resembles vocational training more so than academic preparation. Classes usually are not taught by people who have been trained in theory and research, but by those who are practicing in the field. This may offer practical knowledge for students, but it leaves the study of fundraising in academic limbo.

In a preliminary analysis, this study's author found only 30 articles with the word "fundraising" mentioned in the abstract out of a total of 758 articles published between January 1, 2000 and December 31, 2007 in the three leading journals associated with the study of nonprofit management, philanthropy, and fundraising: *Nonprofit Management and Leadership*, *Nonprofit and Voluntary Sector Quarterly*, and *International Journal of Nonprofit & Voluntary Sector Marketing*. Considering the prominence of these journals, this low proportion (4%) demonstrates the small amount of research being conducted specifically on fundraising. Even though the nonprofit sector is benefiting from increasing amounts of research, there is a lack of research on fundraising.

Lack of Consensus

In the first chapter of her book, *Effective Fund-Raising Management*, the only comprehensive, theory-based textbook on fundraising to date, Kelly (1998) stated, "No academic discipline until now has claimed fund raising as a part of its domain" (p. 11). In this book, she defines fundraising as a specialization, or sub-function, of public relations. Kelly's approach to fundraising will be discussed in more detail in chapter two.

The problem of fundraising not having an academic home is attributed to the fact that fundraising was born outside the university so it has not been established in any one academic discipline. Instead, recent advances in fundraising education and research have been spread out among four major disciplines: public relations, marketing, nonprofit management, and education.

Public relations literature holds that fundraising is a sub-function of that discipline (Cutlip, Center & Broom, 2006). However, many practitioners and some scholars hold the view that it is a sub-function of marketing. Kelly (1995) conducted a study that revealed that members of the National Society of Fund Raising Executives (now AFP) strongly agreed that fundraising is analogous to marketing. Adrian Sargeant, a marketing scholar and Endowed Chair of The Center for Philanthropy at Indiana University, has published many articles and books about marketing being the primary way that fundraising should be practiced. He has conducted numerous studies, including ones that deal with fundraising being conducted through relationship marketing. This view will be discussed in detail in chapter two.

According to Payton, Rosso, and Tempel (1991), "Fund raisers typically borrow whatever seems useful from professional schools—principally from schools of law, business, and public administration, but also from communication or journalism and occasionally from social work and education" (p. 276). Noting this dispersed pattern, they suggested that fundraising should "be studied from the perspective of the liberal arts" (p. 276). The liberal arts

approach would fit both public relations and nonprofit management education. As demonstrated earlier by recommendations of the Nonprofit Academic Centers Council ("Curriculum" 2007a; 2007b), nonprofit management offers integrated curricula that span many disciplines. However, courses specific to fundraising represent a small part of the curricula.

Fundraising is also studied in the discipline of education under the rubric of "institutional advancement." For example, Dr. Timothy Caboni, a professor at the Peabody College of Education and Human Development at Vanderbilt University, teaches courses in fundraising for higher education (Vanderbilt, 2006). He is one of the few education faculty that research fundraising. Kelly (1998) criticized the high proportion of unpublished doctoral dissertations in education, stating, "Most faculty in the education discipline do not contribute to our knowledge about fund raising through their own work . . . yet the vast majority of all theses and dissertations on fund raising come out of that discipline" (p. 111). Currently, education produces almost 85 percent of the doctoral dissertations on fundraising (Caboni & Proper, 2007). There is an academic journal devoted solely to the topic of educational fundraising. The *International Journal of Educational Advancement* was founded in 2001 and is devoted to publishing articles related to fundraising in higher education, as well as articles on the other functions covered by institutional advancement: alumni relations, communications/public relations, and marketing.

Even though institutional advancement has an important role to play in fundraising and its development, it does not concentrate on fundraising and is limited to just one type of nonprofit organizations, those with an education mission. For these reasons, this study will not consider the discipline of education as one of the options for fundraising's academic home.

Importance of Fundraising to Society

The importance of fundraising to nonprofit survival is extraordinary. While it is true that organizations receive government grants for some of their work, that aspect cannot and should

not be relied upon. Fundraising is not only important to financially support the organization and its work, but it is a key way to engage external publics in the mission of organization. As Payton, Russo, and Tempel (1991) said, “Fund raisers exist because fund raising is necessary” (p. 4-5). Fundraising fits into the broader scheme of philanthropy, and is one of the tools that keep the nonprofit sector functioning.

The United States is unique in its tradition of philanthropy. In 2006, Americans gave $295 billion to charitable nonprofits, which represents 2.2 percent of the total Gross Domestic Product of the United States (“Giving and volunteering,” 2007). As Gurin (1991) said, “Fundraising is what makes philanthropy work, and philanthropy is what makes a pluralistic democracy work” (p. 149). Payton, Russo, and Tempel (1991) formulated the following syllogism about the importance of fundraising:

1. Major premise: Philanthropy is necessary in a democratic society.
2. Minor premise: Fund raising is necessary to philanthropy.
3. Conclusion: Fund raising is necessary to a democratic society. (p. 5)

Regardless of reasons already described, fundraising’s important role in our democratic society is sufficient reason for improving fundraising research and education. In a changing society, it is critical that fundraising be able to adapt and discover new ways to be more effective and efficient. Building theories, conducting research, and institutionalizing training are essential to the well-being of fundraising and society. Fundraising and philanthropy give Americans to give to the causes in which they are passionate.

Problem Statement

Fundraising needs to find an academic home in which it can be taught through a program of formal education and gain a body of knowledge based on theory and research. Identifying an

appropriate academic home will benefit fundraising practice, advance scholarship, and strengthen America's nonprofit sector.

CHAPTER 2
LITERATURE REVIEW

Literature on fundraising is widely spread among different disciplines. Public relations, marketing, nonprofit management, and education all have scholarly publications that sometimes deal with fundraising. To sift through the literature, this chapter will first define fundraising from several different perspectives. The status of fundraising as a profession will be reviewed to reinforce the importance of fundraising finding an academic home. The discipline of public relations will be defined and literature that gives evidence relating fundraising to public relations will be examined. Marketing will then be defined and arguments that relate fundraising to marketing presented. Finally, nonprofit management will be defined and arguments regarding its fit for fundraising will be discussed. Education is excluded for reasons given in chapter one.

Definition of Fundraising

The commonly held layperson's view that fundraising is merely begging has long been dismissed by practitioners and most scholars (e.g., Edles, 1993). Russo (Russo & Schwartzberg, 2007) simply stated, "Fund raising is the gentle art of teaching people the joy of giving" (para. 70). Kelly (1998) defined fundraising as "the management of relationships between a charitable organization and its donor publics" (p. 8). She further stated that many practitioners agree that fundraising is concerned with relationships. Communication is considered by most "to be the basis of relationships; as such, the management of an organization's formal communication with donor publics is the defining characteristic of fund raising" (pp. 8-9).

Ken Burnett (2002), a UK consultant who has written extensively on fundraising from a marketing perspective, called fundraising "an approach to the marketing of a cause that centers on the unique and special relationship between a nonprofit and each supporter. Its overriding

consideration is to care for and develop that bond and do nothing that might damage or jeopardize it" (p. 38).

Fundraising's Status as a Profession

As of now, fundraising is not as far along in becoming a profession as the field of public relations. According to Kelly (1998), to be classified as a profession, a field must have: "(a) a body of knowledge based on theory and research, (b) a program of formal education, (c) professional associations, (d) codes of ethics, and (e) shared values of professional autonomy and allegiance" (pp. 103-104). To develop more theory and research, fundraising must find an academic home in which to base its education. As Payton (n.d.) said, "Philanthropy is a subject like medicine: it requires training based on education, practice based on theory, action based on reflection" (para. 2). Although fundraising is more specific than the study of philanthropy in general, it too requires training based on theory and research.

Forsyth and Danisiewicz (1985) examined professionalization by measuring the levels of attitudinal autonomy felt by students studying to work in fields classified as professions (e.g., law and medicine) against students studying to work in fields not classified as professions (e.g., business administration and librarianship). The study found that students of professions had significantly greater attitudinal autonomy than those in non-professions. The authors attributed the finding to the belief that jobs classified as professions are deemed essential to society.

Fundraising has a small body of knowledge based on theory and research. Boland and Bornstein (1991) pointed out, "Creating a theory base that is changed by research and a research base that is informed by theory are considered by many students of the professions to be the most important tactic in the professionalization process" (p. 117). They added that "an occupation with sufficient abstract knowledge and a research agenda related to theory has a flexibility that allows it to respond to both its environment and its ambitions" (p. 117). While there are many

books about fundraising, only a few have a theoretical or research base. Just as fundraising classes in higher education primarily are taught by part-time adjunct faculty, most fundraising literature is written by practitioners (Kelly, 1998). For example, few studies are found on fundraising within communication and public relations scholarly journals (Kelly, 1991). Kelly broadened her criticism to all disciplines:

> Research on the third sector (i.e., nonprofit organizations and philanthropy) has been largely ignored until recently by scholars in the various academic disciplines. Added to that absence of research, fund raising—an important function within the third sector—has been ignored, or limited, as a research subject historically and within the current and growing body of literature on philanthropy. (p. 128)

However, since 1991, three new journals have emerged: *Nonprofit Management and Leadership*, *Nonprofit and Voluntary Sector Quarterly*, and the *International Journal of Nonprofit & Voluntary Sector Marketing*, which provides "strong evidence that research and theory building have increased substantially in the field of philanthropy" (Kelly, 2002, p. 43). In the first two journals listed, philanthropy receives substantially more attention than fundraising. According to Kelly (1998), "Although interrelated, philanthropy and fund raising are not synonymous" (p. 106). Kelly (2002) explained the basic difference: "Philanthropy focuses on giving from the perspective of the donors, and fund raising focuses on managing donor relations from the perspective of the receiving organizations" (p. 43). The *International Journal of Nonprofit & Voluntary Sector Marketing* contains more articles about fundraising than the other two journals, but many of the articles deal with nonprofit marketing in contexts unrelated to fundraising or focus on the United Kingdom, where the journal is based.

The reason fundraising is ignored in many journals, according to Kelly (1998), is because "scholars usually equate fund raising to solicitation, only one part of the process through which gifts are raised. Studies, therefore, have produced knowledge that is insufficient and incomplete

for understanding fund raising and philanthropy" (p. 106). Within public relations, there are several full-time educators who teach and study fundraising (e.g., Waters, 2007); however, Kathleen Kelly is recognized as a pioneer and leader in efforts to incorporate fundraising in the public relations discipline.

Public relations, although not yet a profession, has set in example in the last 25 years by going from a small amount of theory and research to a constantly growing and wide variety of theory and research (Sallot, et al., 2003). Ferguson (cited in Sallot, et al, 2003) said in 1984 "that many scholars and professionals alike would react to the term *public relations theory* by saying, 'What a quaint notion'" (p. 50). That assessment has changed dramatically since 1984, and it is possible for fundraising research to grow similarly.

Establishing an academic home would allow fundraising to make great strides toward becoming a profession.

Public Relations

Definition of Public Relations

It is important to define public relations if it is being suggested as an academic home for fundraising, and to discuss differences between it and other proposed academic homes, such as marketing. Public relations is defined by Cutlip, Center, and Broom (2006) as "the management function that establishes and maintains mutually beneficial relationships between an organization and the publics on whom its success or failure depends" (p. 5). Grunig and Hunt (1984) simply defined it as the "management of communication between an organization and its publics" (p. 6). Harlow (1976) said it is "the distinctive management function which helps establish and maintain mutual lines of communication, acceptance, and cooperation between an organization and its publics" (p. 36).

People often confuse public relations and marketing. Marketer Cindy Hall (1993) explained the difference between the two fields:

> You also need to understand how marketing differs from other disciplines—particularly public relations. Marketing, in its purest form, begins with the consumer's needs; it tries to develop products and services to satisfy potential users. PR, on the other hand, begins with the organization's needs. It seeks to benefit both the campus and its audience by managing the relationship between the two. (p. 30)

Public relations is not simply promotion of products to consumers, but the establishment of working beneficial relationships between an organization and all its publics. In an era of dispute over the value of integrated marketing communication (IMC), in which the functions of public relations and marketing are merged, it is important to distinguish between the two occupations and their related disciplines. Each function is more effective when practiced independently (L. Grunig, J. Grunig, & Dozier, 2002). Reporting findings from their excellence study on public relations, Grunig, Grunig, and Dozier stated:

> We show that excellent communication functions are integrated. However, they are not integrated through another management function, such as marketing or human resources. They are integrated through a senior communication executive—who usually has a background in public relations—or a single public relations department. We found that integrated marketing communication (IMC) is integrated into the integrated public relations function. IMC should not be the concept that integrates communication.(p. xi-xii)

Kitchen et al (2004) said, "A number of public relations thinkers and practitioners saw IMC as not only an encroachment but also a form of marketing imperialism where public relations was concerned . . . because public relations was seen as a management function, while advertising and other forms of promotion are seen as part of the marketing function" (p. 24).

Fundraising as a Function of Public Relations

The perspective this researcher endorses regarding an academic home for fundraising is that public relations presents the best fit. Kelly (1991, 1998) connects public relations and

fundraising and the use of relationship management in both. Relationships are vital to public relations and absolutely necessary to successful fundraising. Fundraising is a specialization of public relations that is capable of making not only short-term behavioral changes, but also long-term changes that result in beneficial relationships between organizations and donors (Worley & Little, 2002, p. 101). Fundraising is more than just solicitation; it is a relationship-building process. With this in mind, public relations and fundraising have many intrinsic similarities.

Kelly (1991) wrote about how neither fundraising or public relations have embraced the other—academically or in practice. But according to Waters (2007), "In the 15 years since *Fund Raising and Public Relations: A Critical Analysis* [Kelly's book] was published, scholars have been slowly warming up to the idea that fundraising is a specialization of public relations" (p. 42). Yet Waters continued that not much has been done to further research in the area and establish correlation between the two fields.

Kelly (1991) said:

> Public relations is a management *and* communication function, which utilizes interpersonal and mass communication techniques. The argument is made that fund raising, on a meso- and a microlevel, is a specialization of public relations. This argument is based on the traditional organization of the public relations function by segmentation of an organization's publics . . . on an examination of the five communication objectives, and on a comparison of the common processes, programs, and techniques shared by fund raising and public relations. (p. 353)

Connections can be made between the two fields in theory and in practice. Regarding the first, Kelly (1991) adapted Grunig's (1984) four models of public relations to conceptualize four models of fundraising. Kelly (1998) also adapted Hendrix's (1995) ROPE model of the public relations process to conceptualize the ROPES process model of fundraising. This theory-building work demonstrates the close theoretical linkages between fundraising and public relations.

Models of Public Relations and Models of Fundraising

The four models of public relations, press agentry, public information, two-way asymmetrical, and two-way symmetrical, were conceptualized by J. Grunig (J. Grunig & Hunt, 1984) to describe the four ways public relations has been practiced and continues to be practiced. Kelly (1991, 1998) adapted these models into the four models of fundraising and named them the same. The ideal model, according to Kelly (1998), is the two-way symmetrical model; however, she added, "Until fund raising finds an academic home with scholar teachers, the symmetrical model will remain underutilized" (p. 172).

Kelly's (1995) research shows that the most utilized model of fundraising is press agentry, the oldest and least ethical of the four models. The purpose of press agentry is propagandizing a cause, and it focuses on manipulating emotions, with truth often a secondary concern. Observation suggests that fundraisers today still primarily practice press agentry. This model has been used by fundraisers since 1902 and was spearheaded by Lyman Pierce and Charles Sumner Ward of the YMCA.

Public information is the second oldest model of fundraising (Kelly, 1995). It is primarily concerned with the dissemination of information. Ivy Lee and Bishop William Lawrence pioneered this model in the early decades of the 1900s. The model promotes the concept of enlightened people who will give when they receive truthful information. This model is asymmetrical in that it seeks to fulfill only the interests of the organization, not those of donor publics (i.e., unbalanced effects).

The two-way asymmetrical model, first used by John Price Jones, focuses on scientifically persuading donors to give to the organization (Kelly, 1995). The communication is two-way between the organization and donors, with unbalanced effects in favor of the organization. The model is dependent on the accessibility of donors, or the degree to which they

are open to influence. It uses results from research to formulate persuasive communications that will be readily accepted.

The two-way symmetrical model, the ideal model, is the newest and most ethical model (Kelly, 1995). It focuses on open, two-way communication and achieving understanding between donors and the organization. The model seeks balanced effects, meaning that the interests and needs of both the organization and its donors are fulfilled. Fundraising is responsible for helping the organization build and maintain relationships with donors. This model ensures that the donor's needs are met, as well as the needs of the organization.

As stated earlier, without an academic home for fundraising, practitioners will not advance from predominantly using the press agentry model to the two-way symmetrical model. In the field of public relations, models of practice have been tested in numerous studies dealing with a variety of organizations. However, in fundraising, the models of practice have not been studied nearly as much.

Process of Public Relations and Process of Fundraising

According to Hendrix's (1995) ROPE model (R-Research, O-Objectives, P-Programming and E-Evaluation), the problem-solving process of public relations begins with research, which is a critical first step in planning an effective campaign. Objectives are then set for the desired output and impact of the campaign. Programming consists of planning and implementing strategies and tactics to achieve the set objectives. Evaluating results as the campaign is in progress allows practitioners to change tactics that might not be working effectively. After the campaign is completed, evaluation is conducted to determine if the objectives were met. Kelly (1998) refined this model to conceptualize a process model of fundraising, ROPES: R-Research, O-Objectives, P-Programming, E-Evaluation, and S-Stewardship.

Kelly (1998) claimed research is the most important step to the ROPES process because "research provides knowledge, formulates strategy, inspires confidence, and ensures practitioners achieve desired results" (p. 402). Researching the organization, the opportunity, and the donor publics emulates the research step in the public relations process model.

Objectives also must be set in fundraising campaigns, represented by both output and impact objectives. Kelly (1998) said, "Output objectives represent the work to be produced" (p. 414). Impact objectives deal with the intended effects of the campaign, categorized as "awareness, accuracy, understanding, agreement, behavior, and repeat behavior. Combined with the two basic intentions of reinforcing or changing, they represent all possible impacts of the function" (p. 415).

Programming in both fundraising and public relations involves planning and then implementing the campaign. In fundraising, both stages consist of two parts: cultivation and solicitation. Kelly (1998) defined cultivation as "managed communication by which fund raisers continually seek to inform prospective donors about and involve them in the charitable organization's work (p. 421).

Understanding cultivation and its tie to building relationships is critical to understanding fundraising's proposed connection with public relations. Fundraisers must build relationships with prospective donors before soliciting a gift. Providing information to and involving prospective donors in the organization builds identification with its purpose. This is similar to the relationship building that occurs in the process of effective public relations, such as cultivation of employee publics.

After cultivation occurs, then solicitation can take place—actually asking for the gift. Broce (1986) said, "Many organizations want to skip the other steps—planning, prospect

identification, cultivation—and just go ask people for money. This is defeating, just as defeating as the approach of the organization that is always talking about the need to raise money but never gets started" (p. 215). As Kelly (1991) said, "Fund raisers generally claim that, in comparison to public relations, solicitation is unique to their function" (p. 350). However, public relations requires solicitation of targeted publics, for example, asking media representatives for story placements or asking community residents to adopt attitudes supportive of an organization's position on an issue.

Evaluation is the fourth step in ROPES (Kelly, 1998). Process evaluation is performed during the programming step. This allows adjustments to be made to the tactics during the campaign as needed. Program evaluation takes place at the end of a campaign when "members of the fund-raising department evaluate their efforts by comparing the results attained with the results sought, as expressed by the set objectives" (p. 431).

Turning to stewardship, Greenfield (1999) said, "Fund raising concentrates too much on asking for money. More time and attention should be given to relationships needed to sustain donor interests" (p. 31). Stewardship is essential to maintaining existing relationships with donors and determines the success of future fundraising campaigns. Kelly (1998) said:

> The fund-raising process is not complete without stewardship. . . . The fifth step provides an essential loop back to the beginning of the process for new efforts. Research takes place during stewardship when fund-raisers employ two-way communication to learn more about donors' interests and needs. Continued interaction represents cultivation of prospects who have already made gifts. In other words, good stewardship ensures that the process is continuous; it does not stop and then later start with entirely different and unknown publics. This last step makes the ROPES process superior to those previously applied in public relations, which end at evaluation and have no stewardship component (e.g., ROPE). (p. 433)

Kelly (1998) lists the four parts of stewardship as reciprocity, responsible use of gifts, reporting, and relationship nurturing. Kelly (2001) first showed the connection between public

relations and stewardship. It is easier for an organization to keep existing relationships strong than to form entirely new ones. Stewardship is important for maintaining relationships between and organization and its public. As Kelly (2001) says, “Organizations that have demonstrated that they are friends of the organization are deserving of continued attention” (p. 289).

Marketing

Definition of Marketing

According to Cant (2004), the American Marketing Association defines the practice and discipline of marketing as follows: “Marketing is the process of planning and executing the conception, pricing, marketing communication and the distribution of ideas, products, and services to create exchanges that satisfy individual and organisational goals” (p. 4). As a discipline of study, marketing has become less focused on making a sale and more focused on meeting customer needs. People are segmented by demographic and other information so that they may be targeted in an appropriate and efficient fashion.

The traditional four P’s of the marketing mix are product, price, place, and promotion. Since this is fairly simplistic in nature, three more elements have been added to the marketing mix. According to Adrian Sargeant (1999), the leading proponent of the marketing approach to fundraising, the added elements are:

- Physical Evidence – Marketers must consider the environment and context in which their services are delivered. Layout of the product or service is important to maximizing the desired effect.

- Process – This refers to the order in which the service is conducted. Marketers need to consider what the consumer will have to do with that process, and how many steps the organization will have to take to get there.

- People – This refers to the people from the organization that the consumer will encounter during the process of the service. Staff training and motivation is very important to this element, if an organization has competent employees, the marketing mix is that much more enhanced.

Connection between Fundraising and Marketing

In 1971, marketing scholars Mindak and Bybee (1971) conducted a study in which they applied marketing concepts to a March of Dimes fundraising campaign. The goal was to transfer organizations like the March of Dimes from a "sales approach" to a "marketing approach" (p. 13). They applied basic principles, such as marketing research and donor segmentation, which at the time were not used by the organization. Since that study, several scholars have applied marketing concepts to the occupation of fundraising. Relationship fundraising and lifetime value of donors are concepts that have emerged from the discipline of marketing and have been researched primarily in the United Kingdom. Much of marketing fundraising research has been focused on annual giving, and not major gifts programs. According to Kelly (2008), this is due to marketing's traditional focus on mass consumers of products and services and that, unlike in the United States, major gift fundraising is only now emerging in the UK.

Process of Fundraising

The process of fundraising from a marketing perspective is laid out by Sargeant and Jay (2004a). It begins with an internal reexamination of the organization's mission statement and overall organizational objectives. Sargeant and Jay said, "These objectives will typically be couched in service delivery to beneficiaries, changes in societal attitudes towards the cause and so on" (p. 20). It is important to write out these objectives to remind the fundraising team what they are trying to accomplish and provide additional motivation.

A fundraising audit is next; Sargeant and Jay (2004a) called this the most important part of the fundraising process. The audit examines the organization's current position as it relates to competitors and the market in general. Sargeant and Jay describe it in the following terms:

> A detailed review of any factors that are likely to impinge on the organization, taking into account both those generated internally and those emanating from the external environment. The fundraising audit is thus a systematic attempt to gather

> as much information as possible about the organization and its environment and, importantly, how these might both be expected to change and develop in both the medium and longer term futures. (p. 22)

A PEEST analysis is a part of the audit and a way to break it down on the macro level (Sargeant & Jay, 2004a). The acronym stands for Political factors, Economic factors, Environmental factors, Socio/culture factors, and Technological factors. Secondary data on these factors is collected to have an idea about what the external environment of fundraising activities will be. Then a competitor analysis is conducted of those that are raising funds for similar causes or among similar demographics of donors.

The SWOT analysis is the last step of the fundraising audit and analyzes the strengths, weaknesses of the organizations with the opportunities, and threats in the environment. According to Sargeant and Jay (2004a), results of the SWOT analysis is a summary of the entire fundraising audit. It should be clear, concise, and easy to understand.

Marketing research is the next major section of the fundraising process (Sargeant & Jay, 2004a). This encompasses researching and segmenting prospective donors. Research includes quantitative data from such methods as surveys and qualitative data from such methods as interviews. Research findings serve as the basis for segmenting the marketing audience and the framework of developing the fundraising campaign

Creating the actual fundraising plan is the next section of the process based on strategic planning (Sargeant & Jay, 2004a). Fundraising objectives are written regarding the amount of funds to be raised, the categories of donors to be recruited, and “the acceptable costs of raising those funds” (p. 70). The objectives should be SMART, which stands for Specific, Measurable, Achievable, Relevant and Time-sealed.

Key strategies are outlined to meet the objectives. This is where marketing segmentation, the overall direction of the campaign, and the positioning of the organization takes place (Sargeant & Jay, 2004a). Tactical planning follows. First, the organization must develop a case for donors to support it. Then, fundraising tactics such as special events or direct-mail campaigns can be planned based on the marketing research, segmentation, and strategy.

Finally, a budget that is within the organization's means and a schedule of the fundraising activities must be created (Sargeant & Jay, 2004a). Monitoring and control is the next step, which involves monitoring the progress of the fundraising campaign towards meeting the proposed objectives. Sargeant and Jay provide the following measures for monitoring: "the actual donations achieved against the budget; the actual costs incurred against the budgeted costs; the performance of specific forms of fundraising; the appropriateness of the strategy/tactics adopted" (pp. 88-89). If the fundraising objectives are not being met, corrective actions can be taken by fundraising managers.

Although similar in many ways to the ROPES process of fundraising, the marketing process just described does not seem to follow as logical of a path. For instance, researching donor publics does not occur in the first and most important step of research, but much later in the process. Also, monitoring and control is not followed by program evaluation, or efforts to evaluate the overall campaign after it is has been completed. Furthermore, the emphasis on the organization throughout the process suggests an asymmetrical approach to fundraising.

Relationship Fundraising

Marketing scholar Leonard Berry (1983) first coined the term "relationship marketing." In 1992, Burnett (cited in Sargeant, 2001b) applied the concept to fundraising "to champion a move toward dealing with donors individually, recognizing each donor as unique in terms of giving history, motivation for giving, and the overall standard of care expected from the charities

being supported" (p. 180). Since introduction of this perspective, the paradigm of fundraising as marketing has shifted from transactional to relationships (Sargeant, 2001a).

Sargeant (2001a) explained, "At the core of relationship marketing is the development and maintenance of long-term relationships with customers rather than a series of discrete transactions" (p. 25). Therefore, instead of fundraising being treated as a series of separate exchanges, it is treated as outcomes of ongoing relationships. Once a transaction is completed, a new one begins, and the relationship is maintained over time. (Sargeant & Jay, 2004b). The new perspective was adopted because, with the older approach, donors became subjected to unregulated marketing activities and fundraisers began to ignore basic marketing tactics.

According to Sargeant (2001b), relationship fundraising is dependent on the choices of donors. They may choose the type of communication they receive and are given greater flexibility in how often they are contacted. The donor is treated as an individual, and it is not necessary to break even financially on the first communication with the donor (Sargeant, 2001a).

In contrast, with the transactional approach, little segmentation takes place and communication with all donors is conducted in very similar ways (Sargeant, 2001a; Sargeant & Jay, 2004b). Donors are asked to give right away, because the situation is urgent and Return–on-Investment (ROI) must be maximized as soon as possible.

Lifetime Value (LTV) is an important component of the relationship approach to fundraising (Sargeant, 2001a). LTV attempts to measure a donor's worth to the organization over time through prospect research. Once this is determined, the organization can form appropriate strategies to build a long-term relationship with current and potential donors.

Nonprofit Management

The discipline of nonprofit management is not defined specifically in a textbook, but it is a compilation of different disciplines taught in universities from a nonprofit perspective. The

discipline of nonprofit management focuses on educating students for a variety of jobs within nonprofit organizations from the perspective of a liberal arts curriculum ("Curriculum," 2007a). Liberal arts is preferred because some scholars say that fundraising draws too much from professional schools, such as law, business, and public administration (Payton, Russo, & Tempel, 1991; Lindahl & Conley, 2002). The point that is being made through this approach is to teach students why philanthropy and fundraising are important, rather than preparing future fundraising practitioners. As described in chapter one, recommended curricula for both undergraduate and graduate students includes only one course dealing specifically with fundraising. Although other professional courses related to fundraising are recommended, such as courses in finance, marketing, and management, the curricula appear deficient for making a strong case to house fundraising in the discipline of nonprofit management.

Even though there is little fundraising coursework, a study sponsored by the Kellogg Foundation found that graduates receiving bachelor's degrees in nonprofit management deemed fundraising and development, along with strategic planning, to be the most important things that are needed to run a nonprofit (Larson & Wilson, 2001). The researchers interpreted these results as the students expressing their desires to have taken more fundraising classes during their educational experience.

Furthermore, nonprofit management scholars have produced few studies on fundraising, giving much more attention to philanthropy (Kelly, 1998). A leading scholar, who concentrates on fundraising research and advocates placing the function in the nonprofit management discipline, could not be identified for this study. Regardless, nonprofit management programs across the country currently are educating many students who plan to pursue fundraising careers.

However, nonprofit management has the benefit of being the only discipline in this study that focuses completely on the nonprofit sector, so it has obvious benefits. Future fundraisers would be able to learn the basics of the nonprofit field and receive a broad-based education.

Research Hypothesis and Questions

The problem has been identified: The important organizational function of fundraising does not have an academic discipline to call its home, and there appears to be disagreement among scholars as to where it belongs. Based on the literature just reviewed, the following hypothesis and research questions guided this study:

- **H1:** No consensus exists among scholars who have recently studied fundraising as to the academic discipline in which fundraising should be housed in colleges and universities.
- **RQ1:** In what particular course of study do fundraising scholars believe fundraising practitioners should be trained?
- **RQ2:** To what extent are fundraising scholars knowledgeable about public relations and its potential to provide an appropriate academic home for fundraising?

CHAPTER 3
METHODOLOGY

In light of the exploratory nature of the study and its hypothesis and research questions, in-depth interviews were deemed the most appropriate research methodology. This method was chosen to get expert opinion about a subject dealing with academia. An idea that was entertained earlier in the planning of this study was to survey fundraising practitioners regarding their opinions on where future fundraisers should be educated and the discipline in which the field should be researched. However, the idea was dismissed because it was decided that scholars' viewpoints should be studied before collecting the viewpoints of practitioners, who cannot be expected to provide answers regarding theory building and research.

This decision partially explains why interview methodology was used. There are too few researchers studying fundraising to gather quantitative data by survey, but a population could be identified to conduct in-depth interviews.

A major advantage of interview methodology is "the wealth of detail that it provides" (Wimmer & Dominick, 2006, p. 134). The researcher not only attempts to interview members of the selected population, but also achieve a level of rapport conducive to collecting the data needed. Janesick (1994) explained:

> Access and entry are sensitive components in qualitative research, and the researcher must establish trust, rapport and authentic communication patterns with participants. By establishing trust and rapport at the beginning of the study, the researcher is better able to capture the nuance and meaning of each participant's life from the participant's point of view. This also ensures that participants will be more willing to share everything, warts and all, with the researcher. (p. 211)

Although rapport is important, the interviewer must remain neutral while being empathetic to the participants' responses. Maintaining neutrality is particularly important when the interviewee expresses a view with which the researcher strongly agrees or disagrees (Legard, Keegan, & Ward, 2003).

Population and Interview Procedure

Fifteen fundraising scholars were interviewed for this study from a population of 22 scholars, which represents a 68 percent response rate (15 / 22 = 68%). The population of interest was all scholars who have conducted research on fundraising. The population selected for study was U.S. authors of peer-reviewed articles that mentioned fundraising in their abstracts and were published between January 1, 2000 and December 31, 2007, in one of following three journals: *Nonprofit Management and Leadership*, *Nonprofit and Voluntary Sector Quarterly*, and *International Journal of Nonprofit & Voluntary Sector Marketing*. As noted, the population was limited to scholars residing in the United States, which was necessary due to high costs of interviewing international scholars and potential language problems. Furthermore, practitioner authors were eliminated from the population unless they also were graduate students. Co-authors of the same article were included; duplications were removed.

Analysis of the three journals identified 22 scholars who met the population criteria just described: 8 full professors, 6 associate professors, 5 assistant professors, 1 holder of an endowed chair, and 1 doctoral student. Internet searches and telephone calls were used to compile their contact information, including e-mail address and telephone number. A list of the fundraising scholars who constituted the population is presented in Appendix A.

In a brief review of the articles written by the participants, it was found that most of the articles engaged in quantitative research with a lack of theoretical basis for fundraising. About one-third of these articles were focused on financial measurements, with the rest focusing on various topics within fundraising. While many of these articles cite theoretical literature, only one-third make visible attempts to build fundraising theory.

As already stated, 15 of the 22 scholars participated in the study. They are not identified to protect confidentiality. The remaining seven scholars declined to be interviewed due to time constraints or because they believed they did not know enough about the topic to participate.

The 15 participants formed a group that was sufficiently large and diverse to provide a range of opinions. 7 are women and 8 are men. They are affiliated with universities spread across the country. A breakdown of their academic rank is as follows: 5 full professors, 5 associate professors, 3 assistant professors, 1 retired associate professor, and 1 doctoral student. They represent a variety of disciplines, including the three major options for an academic home for fundraising. Discipline representation is as follows: 4 from accounting, 3 from marketing, 2 from communications/public relations, 2 from public administration, and 1 each from organizational management, management, and economics. This shows that the research is currently being conducted in multiple disciplines, the majority of which are business schools.

The interviews were conducted during a span of one month between April 7, 2008 and May 6, 2008. An interview guide was followed, although the researcher was free to ask follow-up questions to draw appropriate information from the participants, as recommended by Wimmer and Dominick (2006). The interview guide is presented in Appendix B. Interviews were administered by telephone and recorded by a digital recording device. The interviews were transcribed by a transcribing business in Ocala, FL to facilitate analysis.

Participants were recruited first by personal letter, followed by phone calls and e-mails to set up interview dates and times. A confirmation e-mail was sent to each participant 48 hours before the interview to serve as a reminder. Each participant was read an informed consent form over the phone and asked for a verbal agreement. Verbal consents were recorded in addition to the interviews.

Key Variables and Question Categories

The key variables measured in the study are as follows:

- Attitudes regarding the discipline in which fundraisers should be educated.
- Attitudes regarding the discipline in which fundraising theory building and research should be conducted.
- Attitudes regarding fundraising's theoretical basis.
- Attitudes regarding options for fundraising's academic home.

Demographic information was collected on each participant, including his or her academic background, research experience, career experience, and current research interests.

The interview guide consisted by 21 questions sought to answer the study's key variables. Participants were questioned about the academic preparation of fundraising practitioners and the discipline in which fundraising research and study primarily should be conducted. Another section of the interview guide questioned the scholars' beliefs about the way fundraising should be practiced. Its purpose was to compare participants' beliefs about fundraising practice with the discipline in which they say fundraising should be taught and studied. Additionally, participants were asked to give their own definition of fundraising. The interview guide was pre-tested in a pilot study involving two faculty members and one fundraising practitioner.

Data Analysis and Verification

Data analysis utilized emergent coding. Wimmer and Dominick (2006) explained, "Emergent coding establishes categories after a preliminary examination of the data. The resulting category system is constructed based on common factors or themes that emerge from the data" (p. 159). Marshall and Rossman (2006) described seven phases of qualitative research analysis: "(a) organizing the data; (b) immersion in the data; (c) generating categories and themes; (d) coding the data; (e) offering interpretations through analytic memos; (f) searching for

alternative understandings; and (g) writing the report" (p. 156). These phases generally were followed in this study's analysis of the data.

Responses of the 15 participants were organized by individual questions and by categories. The responses were compared and contrasted and any outlier responses were noted. A short summary of each participant's response to each question was entered in a Microsoft Excel file, which facilitated analysis. Verbatim quotes were selected to represent participants' views and support key points of the findings. Results were compared to Kelly's (e.g., 1991, 1998) perspective of fundraising as a specialization of public relations.

CHAPTER 4
RESULTS

The results of this study are reported in three major sections, representing the study's one hypothesis and two research questions. Participants' views are paraphrased and directly quoted, are presented to support the hypothesis and answer the research questions. Additionally, a breakdown of responses regarding the various topics related to the hypothesis and research questions are provided.

H1: No Consensus Exists among Scholars Who Recently Have Studied Fundraising as to the Academic Discipline in Which Fundraising Should Be Housed in Colleges and Universities.

The hypothesis is supported. There is much division among the scholars participating in this study as to the academic discipline in which fundraising should be housed. Participants mentioned an array of disciplines: public relations, marketing, nonprofit management, economics, management, organizational behavior, public administration, finance, psychology, social work, and the liberal arts. However, most participants seemed to favor a discipline traditionally housed in a business school, such as finance, economics, marketing, or management. This was true for the related topic of programs of formal education at the three degree levels of bachelors, master's, and doctoral. However, since most of the participants were from business-related disciplines, this is to be expected.

Levels of Education

At the undergraduate degree level, 4 of the 15 researchers said fundraising education should be housed in marketing, 3 said in a general college of business, 2 each said in public relations and sociology, and 1 each said in nonprofit management, integrated marketing communications, and general liberal arts or an integrated curriculum. One was undecided.

At the master's degree level, of the 15 researchers, 3 each advocated housing fundraising education in general colleges of business and programs of nonprofit management, 2 each said in marketing and public administration, and 1 each said in public relations, organizational behavior, and integrated marketing communications. One researcher believed it could be housed in almost any area.

At the doctoral degree level, 4 researchers said fundraising education should be housed in general colleges of business, 2 each said in marketing, economics, public administration, organizational behavior or management, and nonprofit management, and 1 each said in public relations and integrated marketing communications. One researcher did not want to limit it to just one area.

General Opinions on Academic Home

As already reported, there were many diverse opinions about where fundraising's academic home should be placed—with opinions closely aligned to the participants' own disciple. For example, a marketing professor said, "I am coming again from a prejudice because I have a marketing background, but I really do believe that some type of marketing background would be really, really beneficial. . . . There are a lot of basic skill sets that you would learn with a marketing background."

This participant went on to say that including a cross-disciplinary track in the marketing field would be the best option in order to understand social as well as business issues.

Another scholar, a professor of communication who endorsed the public relations perspective, pointed out the need for students to understand the nonprofit sector as well as mastering basic public relations concepts. He said:

> One of the things that I really like … [is a] nonprofit minor, which really can help explain fundraising a little more beyond the theoretical perspective on the public relations' side. . . . You definitely need to have a solid understanding of the

> nonprofit sector . . . but [fundraising] really is growing relationships and understand[ing] donors through research. All of that you get from public relations, and I do not think any other discipline could handle that better. But I do think there needs to be some sort of balance with the nonprofit side.

This opinion introduces a theme that runs through many of the interviewee's comments: Educational preparation is needed in multiple disciplines for fundraising practice and study, not just one. Even though public relations is mentioned as a home by this researcher, he feels public relations needs to work in cooperation with nonprofit management.

Some participants, however, thought fundraising should be housed in only one area, like one professor of marketing, who said, "Even if you have a big university that can support a specialized program in nonprofit management . . . I still think it belongs in the college of business, which might be counterintuitive to a lot of people."

In contrast to the opinion that business is the best option for fundraising, a professor of public administration said, "I would look for a professional degree program that stresses nonprofit management where you might have a chance to take some elective courses and a specialization in charitable fundraising."

Definitions of Fundraising

It is not surprising that there is no agreement on an academic home for fundraising, because the definitions of fundraising given by participants and their beliefs regarding a theoretical basis of fundraising were vastly different as well. Some participants had more complex definitions than others, while some had more complex views of basic theory than others.

The main distinction in the differences of definition was that most responses included either the use of the word "relationships" or the phrase "raising funds." A professor of public administration, with four years of professional experience, said:

> I think fundraising . . . is really about friend raising. It is really about building relationships with people in the community . . . [and that] turns into financial support sometimes. It also turns into other kinds of support for the organization . . . . [Nonprofits] need to reflect what the needs are in the community and so it is important for organizations to have those connections and fundraising is part of that.

One researcher, with an undergraduate degree in journalism and a master's in nonprofit management, said:

> It would be . . . the identification, the qualification, the facilitation, and the appreciation by a qualified development professional and his [*sic*] team of volunteers of charitable gifts from individuals, corporations and foundations toward the end of helping nonprofit organizations better fulfill their missions and make positive differences in people's lives.

Another researcher, a professor of management, said, "It is friend raising, and I would define it as rallying individuals with a like-minded interest or goal … in pursuit of benefiting society in some manner —and financially—I should probably add that." Another researcher, with a background in public relations and communication and professional experience as a fundraiser, said:

> I think of fundraising as a process that makes a match between the organization that is seeking [financial] support and potential supporters who are seeking to achieve the same goals that the organization is trying to achieve. . . . As I see it, there is a process that helps both an organization and people with some disposable wealth in the community find their way to achieve their shared goals.

Note that the financial implications are secondary to these definitions; the scholars are more interested in relationship building. What was most interesting is that only one of the multiple participants with a business perspective defined fundraising in this way—and he was in the field of management, not marketing. A theme that was evident in the definitions is that scholars who advocate relationships mainly come from disciplines outside the business school.

Of the 15 participants, 10 gave definitions of fundraising that included no component of relationship building. These scholars primarily represent business disciplines. An example was

given by one accounting professor: “It is the marketing and salesmanship in raising donations for nonprofits. Some might include the advocacy, and sort of the branding with traditional marketing.” A marketing professor said her definition is as follows: “Doing activities that would increase support to the nonprofit through direct money coming in or through some other resource like being listed as someone that would receive money from an estate.” A second professor of accounting said fundraising is “efforts by a nonprofit organization to get donations from mainly individuals, but could also include foundations and other sources.”

Theoretical Basis for Fundraising

The question about the theoretical basis for fundraising resulted in the most diverse responses of the study. There was almost no consensus when it came to the best theoretical basis for studying fundraising. All the theories mentioned are as follows:

- Basic exchange theory
- Relationship management and other general relationship theories
- Excellence theory
- Psychology theories
- Organizational theory
- Resource dependency theory
- Economic dualism
- Altruism theories
- Evolutionary biology
- General communication theories
- Co-orientation theory
- Social orientation theories
- General business and marketing theories
- Nonprofit behavior theory
- Ethnography
- Organizational development
- Consumer marketing
- Management theories
- Stakeholder theory
- Stewardship theory
- Legitimacy theory
- Ethical theory

- Economic theory
- Social business theory

Of all these theories, only three were mentioned twice: general marketing theory, relationship management, and organizational behavior/management.

A marketing professor referred to the work of Adrian Sargeant and Elaine Jay (2004a) about the organization's fundraising efforts being mission driven. She said fundraising "is a supportive function, it is not an end in itself. We can do fundraising that is market oriented. In fact, we look at potential donors as customers, and we can work with that only within the overall mission. The mission absolutely has to come first."

A professor of public relations/communication endorsed relationship theories:

> I think if you look across all the fundraising literature, what seems to be emerging . . . is the relationship perspective—really looking at the theoretical constructs and how that relationship is managed. But even if you look at the practitioner literature, you start to see . . . more examples of how you can cultivate a relationship with an annual giving donor to ensure donations will keep coming in and . . . over time become a major gift donor.

Responses similar to the ones just described were predictable in light of the literature reviewed, but many participants gave answers that were completely unexpected, as evidenced by the list of theories presented at the beginning of this section. Many of those interviewed were taken aback by this question. This is probably because about one-third admittedly said they had not given much thought to the theoretical basis for fundraising. It seemed that most resorted to a general theory within their own discipline, applying it to fundraising. This leaves room to question the research that some have conducted, whether the lack of theoretical thought has impacted previously done research.

Fundraising Professionalism

The participants were asked if fundraising should move towards professionalization based on Kelly's (1998) criteria of "(a) a body of knowledge based on theory and research, (b) a

program of formal education, (c) professional associations, (d) codes of ethics, and (e) shared values of professional autonomy and allegiance" (pp. 103-104). Six of the 15 researchers, or slightly more than one-third, believe it is important to strive towards professionalization. Another 6 believe it is not important, while 3 believe fundraising already is a profession. One researcher, from the discipline of public relations and communications, believes fundraising's biggest hurdle to becoming a profession is compiling a significant amount of theory and research. He said:

> Where I see the professional side falling down is the theory and research. We are slowly starting to have more of a theoretical understanding of fundraising. I think that is helping a little bit, but I am not sure how big of an impact that is going to be because most people do still have this misunderstanding that fundraising really is solely involved with telemarketing, car washes—really small forms of raising money by people who generally volunteer, people who are telemarketers.

The same researcher added: "I think it is going to take more than a theoretical understanding to really improve fundraising, to improve the overall view of the fundraising field."

One professor of marketing, who believes fundraising should strive towards professionalism, thought the first thing that should be done is to offer more fundraising-specific classes at universities in marketing and nonprofit management units. Even though six researchers thought it was important to move towards professionalization—a code of ethics, education, and theory and research—a few brought up the issue of licensing of fundraisers as an unappealing idea. One public administration professor thought that professionalization could actually hurt nonprofits and fundraising. He said:

> If we professionalize fundraising completely, then that means that we have to kill 80 percent of the nonprofits that are out there where volunteers are doing all the work. . . . I think we probably professionalize the field too much in many ways already. . . . In the *New York Times* this week there is an article about fraud and abuse in nonprofits, how much money is lost on charities each year. . . .

> Presumably, if people were better educated, maybe that would not happen. On the other hand, it might happen more. You know there are people who learn there're ways to get around the rules. . . . Quoting a report that was in [a] recent *Nonprofit Volunteer Sector Quarterly* article . . . [It said] the worst offenders were men in really high paying positions in nonprofits, who presumably are professionals with professional degrees. . . . I do not think that we need to go towards more professionalization necessarily.

Perceived State of Fundraising Research

Participants were asked for their perceptions of the current state of fundraising research. Although there is some evidence that research has increased, this study's participants (who account for much of the recent research) adamantly and almost uniformly assert there is still much to accomplish in research on the field of fundraising. This is one topic that all the participants answered similarly. Six scholars said there was little research being done or available; 8 said the research is improving, decent, or making strides, but still has a lot of progress to make; and 1 researcher felt he did not have enough prior knowledge to comment on the subject. It should be pointed out that no one said fundraising research is exactly where it should be.

One communication scholar said, "I think fundraising research right now really does not know where it is going. And I think in part it is because, kind of like [what] you are getting at with your study, . . . we are not really sure how to approach it." A public administration scholar said, "It has been growing, . . . it is sort of mostly about how do we get more people to give more money without really . . . taking into consideration that fundraising should be more than just about raising funds, but about raising friends. . . . I think it is growing, but there probably could be a little more of a critical edge to it than there is." A nonprofit management scholar said the research has become largely anecdotal in nature. In his opinion, fundraising research is growing, but it is not necessarily going in the right direction.

One marketing professor spoke about the growth she sees in fundraising research:

> There have been some great strides in recent years . . . we now have not only a generalist type journal on nonprofit management, but . . . we have a couple of journals on nonprofit marketing. . . . We are seeing more articles on fundraising than we had in the past. I think more work is being done on it, and I think part of that is because it is an unexplored field and we just are at a point in time where people are kind of discovering it. . . . Secondly, many countries, the U.K. and the U.S. particularly, are seeing cutbacks in government funding for different operations. . . . [As a result, there is an increased] need for fundraising for a lot of different nonprofit organizations. . . . There is a need to know more about it and know more about how it works, how to do it effectively.

Perceived State of Fundraising Education

The participants were not nearly as unanimous when asked about their perceptions of fundraising education. Of the 15, 7 believe there is not much fundraising education, 3 did not feel that they had enough knowledge to comment on education, 2 believe that fundraising education is making progress and experiencing growth, 2 believe that fundraising education is good, and 1 believes there is too much focus on fundraising in nonprofit management programs. Representing the first opinion, a marketing professor contradicted the pattern of a recommended academic home for fundraising being linked to the scholar's discipline and said:

> I would say that where fundraising would fall would be under the not-for-profit umbrella and their problem is going to be how many courses in curricula across the world actually focus on not-for-profit. Not many. And, so where you are going to get it is, if you do not get a specific course in it, it may actually have to be part of a services course, which is a limited way to get it. So, I do not think it is well enough developed yet in terms of curriculum. . . . I would say as far as an academic side of things, it is poorly developed at this point.

Others echoed this sentiment, saying there are simply not enough classes being taught, and those that are not well-balanced between practice and theory. An important point was made that fundraising education is either too practical, with no theory, or too theoretical, with no practical knowledge taught. An organizational management researcher, with 17 years of fundraising experience, blamed course instructors for much of the unbalance:

> I think that there are programs that have attempted to teach either from a purely experiential perspective and they typically are involving practitioners with some

> level of experience, but very little knowledge about the research and the literature. Or you have people who are theoreticians, who are academics, who are teaching from the literature, but do not have much practical experience. And what fundraising teaching needs, just as the whole field of nonprofit studies is really calling for, are "pracademics," people who understand the literature and understand the research, but understand it from an applied perspective, have [had] a career in the field, or have some level of experience.

This researcher prides himself on being a pracademic and teaches classes in both academic and practitioner settings. A public administration professor believes fundraising education leans too much to the practical. She said:

> My perception of nonprofit education, generally, is that we are trying to educate our students to run little nonprofit businesses instead of thinking about nonprofits as . . . contributors to society in other ways, like enhancing democracy or building social relations. I think that in our nonprofit programs—and our fundraising curriculum included in there—we sort of focus a little bit too much on the technical "how to" and not enough on why we are doing this.

Another public administration professor also disparaged limitations of nonprofit management education, but his view is that too much emphasis is placed on fundraising:

> I think most programs now that report to educate managers of nonprofits will have at least one course in fundraising. . . . My main criticism would be that most of the educational programs do not put fundraising into context, and I guess what I mean by that is while fundraising is a very important component of supporting most nonprofit organizations, overall it is perhaps the third most important source of funding. . . . So you almost get the impression from the way it is taught that it is the main game in town. . . . People need to realize that nonprofits sustain themselves largely by income [from fees and dues and] by government funding, and that fundraising is maybe 20 percent of the game. . . . I would like to see education about financing nonprofits be much broader than it tends to be, and we are starting to move in that direction.

Based on this study's findings, scholars generally believe that fundraising education needs improvement. Most think there is too little and the wrong kind. As documented in earlier chapters, academic programs on nonprofit management are established in colleges and universities, but fundraising education has lagged behind.

RQ1: In What Particular Course of Study Do Fundraising Scholars Believe Fundraising Practitioners Should Be Trained?

The discipline that was mentioned most frequently was marketing, followed by other fields within business schools. However, similar to findings supporting the hypothesis, there was a variety of educational settings advocated by participants, such as public relations and other non-business disciplines. A reoccurring theme seemed to be that fundraising practitioners should be trained to be a "jack of all trades," learning to do many different tasks well. Because of this, over half of the participants mentioned education beyond his or her chosen discipline as the academic home for fundraising.

Training for Practitioners

When asked what major for undergraduates is the best training to be fundraising practitioners, 5 of the 15 participants, or one-third, said marketing, 3 said general business, 2 said public relations, 1 each said journalism, economics, finance, social work, and social science majors, and 1 participant said it could be almost anything at the undergraduate level. For graduate students, 5 said any type of MBA, 3 each said marketing-focused MBAs and nonprofit management, 2 said public relations, 1 each said public administration, a philanthropy center such as the one at Indiana University, and anything that the student is interested in studying.

Just as many of the participants had a difficult time identifying one academic home for fundraising, they also had a difficult time identifying only one type of educational background for students aspiring to be fundraising practitioners. About one-third said it depended on the type of organization where each individual student desires to work one day. For example, students wishing to raise money for a hospital should pursue health-related studies; or students wishing to fundraise for a charity that is more general should pursue studies in nonprofit management. One

public administration scholar expressed his opinion in favor of nonprofit management, but also developing communication skills:

> Well, I would say a broad education on nonprofits. A program that would educate you to be a manager, a leader of a nonprofit organization, would be a good place to start so that you know why you are fundraising. I mean, an effective fundraiser understands the purposes of the organization and understands how it works, how it addresses its mission, what its programs do and how they work. So, I think that that kind of foundation is important to be able to communicate to people why you want them to give you support, to give you contributions. I think fundraisers also have to be, obviously good communicators. . . . It does not hurt to have those good communication skills and good people skills.

Over half of the participants had similar responses, a "jack-of-all-trades" type mentality to fundraising education, until they were asked to name one field as their top choice. Although they expressed specific opinions about educational background for practitioners, they usually were not willing to limit students to one specific area of study. As a professor of business said:

> I think a business setting is the more appropriate . . . because I think to understand how organizations function properly would be an important prerequisite to be able to understand how a not-for-profit can survive. . . . I am a specialist in advertising as well, so part of my discipline . . . is made up of the journalism communications side, which focuses more on the actual content of the ad and the creation of the creative power. . . . Then you have also got the marketing side, which is going to focus on how do we execute and how do we measure the success. I think that both of those are important. . . . I would say that there is an important business background to [fundraising] and there is also an important understanding of the communications side of it . . . . Maybe team teaching these courses from a business, journalism, communication side would be important or we put an interdisciplinary curriculum together.

The same professor pointed out a serious problem with a multidisciplinary approach to fundraising education, saying, "There are so many courses to cover in just the business background that it leaves little room for bringing in too many additional courses." He suggested that elective courses could be used to study communication.

Further probing by the interviewer revealed that this scholar's suggested path of education would be integrated marketing communication (IMC). But many of the participants

believed that their selected background for fundraising should not stand completely alone. This was a repeated theme, whether it was a selected major with internships in nonprofits, or minoring in another area that participants believe to be helpful for fundraising.

A public relations scholar illustrated this view and connected undergraduate to graduate education:

> If I were truly picking out the ideal route, I would probably say undergrad in public relations [but] part of it depends on the student as well. If in their undergrad work they had a good bit of exposure in nonprofit organizations in their internships, class projects, or something like that, and they truly understood the nonprofit sector, I would say continue your graduate work in public relations.

The researcher went on to say that nonprofit management would be the recommended area for graduate education if students had a background in public relations, but not much experience in the nonprofit sector.

Training for Researchers

Results regarding the topic of the best training for fundraising researchers were similar to those on the recommended educational background for fundraising practitioners. Of the 15 participants, 4 said marketing was the best preparation for future researchers, 3 each said statistics and economics, 2 said public relations, and 1 each said nonprofit management, social sciences, and philosophy. In this count, about one-third of the participants deviated from their own discipline.

The main difference in results regarding recommended educational preparation for researchers versus that for practitioners was inclusion of statistics in the former. In fact, almost all participants agreed that statistics should be a part of the education of future fundraising researchers. Interestingly, not one participant suggested that doctoral students should study statistics when asked directly about an academic home for fundraising, although the topics obviously are similar and the reviewed literature in both public relations and marketing strongly

suggest that research knowledge and skills are critical to effective fundraising practice. The difference in responses may be attributed to the relatively large number of practitioners who pursue doctoral degrees but never conduct scholarly research beyond their dissertations, such as doctoral students in the education discipline (Kelly, 2002).

Yet an accounting professor emphasized the importance of statistics for practitioners and researchers. He said, “I think the fundraising professional needs more to be able to understand the research. The researcher needs to have a deeper knowledge in order to properly conduct experiments in research.”

Endorsing a statistics background for researchers, a management professor said, “I think from the research side, the research methods would be huge and that would include things like survey instrument development and validation [and] classes on factor analysis” A marketing professor said, “We need to blend qualitative and quantitative research. Therefore, to do academic research effectively in this area we need to balance out qualitative research with quantitative research, which means that we should not shortchange either of them. But that is going to mean adding to the methodological sequences.”

Comparing the overall responses to statistics to the responses for a theoretical basis for fundraising, it appears that there is a difference in knowledge. While scholars are well versed in the necessity of training fundraising researchers in statistics and research methods, but they have given insufficient attention to theories to guide research and build a cumulative body of knowledge.

In response to a related question, the most recommended institution for both undergraduate and graduate studies on fundraising was the Center for Philanthropy at Indiana University. On the graduate level, Case Western Reserve University and Georgia State

University were mentioned as well. Participants were much more hesitant to name specific institutions for undergraduate study and suggested that students get into the best school they could or an institution with an appropriate academic program.

RQ2: To What Extent are Fundraising Scholars Knowledgeable about Public Relations and its Potential to Provide an Appropriate Academic Home for Fundraising?

Other than those participants representing the public relations and communication disciplines, scholars' knowledge about the potential of public relations to provide an academic home for fundraising is low. One-third of the participants were unfamiliar with what public relations has to offer the field of fundraising. Specifics of public relations practice appeared to be missing from the majority of the scholars' knowledge base.

Knowledge and Opinions of Public Relations

The research question generated mixed results. One-third of the participants in addition to those who are public relations scholars indicated that they are knowledgeable about public relations and its potential to serve as an academic home for fundraising. Other participants spoke about relationship building and other core tenants of public relations theory and practice, but did not indicate that they were familiar with public relations as an approach to fundraising practice and research. Some scholars, all from business disciplines, professed to know about public relations practice and theory, but their knowledge was flawed or based on stereotypes. For example, they said public relations is a subset of marketing, is salesmanship, or it is "spinning" the organization's position on issues. A few participants admitted they did not know anything about public relations being a possible academic home for fundraising.

Regardless, most participants were not hostile to the idea of educating practitioners and studying fundraising from a public relations perspective. On the other hand, a few participants expressed strong opposing opinions on the topic. For example, one professor of marketing said,

"I do not think public relations is going to do it justice." When probed further about his reasoning, he responded:

> The tools and techniques needed for analysis, the strategic implications—I do not think you get that out of public relations. . . . While public relations is part of the four P's of marketing— product, price, promotion, and place— it is part of the promotion component. . . . Why are we looking at separating some of these disciplines out from their mother disciplines and . . . placing them elsewhere?

The participant identified integrated marketing communications (IMC) as a better alternative than public relations. His belief is that communication contributes to fundraising only if it is combined with marketing practice.

An economics professor, who endorsed a combination of economics and marketing as an academic home for fundraising, indicated that public relations could contribute to fundraising on a secondary level, but the supposed contribution was based on flawed knowledge of public relations. He said, "Well, it is very complimentary. Public relations is a discipline that is about creating a very good image in the minds of your constituencies, your external constituencies."

Opinions about Marketing

When asked their opinions about marketing as an academic home for fundraising, 10 of the 15 participants, or two-thirds, expressed positive views, while 5 participants responded with neutral or negative views. A public relations/communication scholar said marketing would only be a viable option for fundraising if it included a communication component. The professor continued with the following explanation:

> Marketing in for-profits tends to focus on a consumer where fundraising does not. In fundraising, the donor is not a consumer, and if you start to think of the donor as a consumer, then you are thinking of the donor as someone who can buy something from a nonprofit and that is just not the right frame. I think some people are doing a pretty decent job of using marketing as their frame for teaching fundraising. Now, what I really think is horrible is taking a sales approach to fundraising. Sales is absolutely out. . . . Fundraising is not a matter of looking for products within the nonprofit organization and then finding people to sell them to.

> . . . My preference is to do [fundraising] from a communications frame because I think it just plain works better.

A marketing professor had a very different opinion:

> I think that fundraising is marketing. . . . There is a part of fundraising that can be public relations, and a part of fundraising is relations with the public, and [in] a part of fundraising you need communication, but I guess I will agree with marketing. I believe you get a more technical knowledge and a more thorough education.

Opinions about Nonprofit Management

Of the 15 participants, 9 had positive opinions about nonprofit management as an academic home for fundraising, while 6 had neutral or negative opinions. Most think the discipline is a viable option but not as good as marketing or public relations, respectively. One professor of public relations/communication said the following about nonprofit management education:

> I think it is pretty helpful for someone who wants to go into nonprofits to do good, either for a community or for a specific cause, but is not quite sure . . . what they want to do once they are working in the sector. . . . If someone has the mindset, "I want to be a fundraiser," I would say go for public relations. If you are someone who wants to just work in the nonprofit, wants to work for a specific cause, the general [nonprofit] management minor or [nonprofit] management major or masters would probably be more helpful. . . . You are going to be exposed to designing and developing new programs for your nonprofit, exposed to [being a] volunteer coordinator. . . . Those sorts of topics just do not come up in public relations as much as fundraising does. So, if you have a very specific interest in wanting to be a fundraiser, the nonprofit management degree may not be the best for you, but if you are very open and you are not really sure what you want to do, it probably is better because you will have that exposure.

A professor of accounting agreed, saying, "Nonprofit management is extraordinarily broad and fundraising is a very small part of nonprofit management. You cannot presume that someone who can manage well a nonprofit would also be an excellent fundraiser." Another professor of accounting said, "I still think they need to stay grounded in the business paradigm."

These opinions represent the views of most of the participants and a theme emerging from the study: Nonprofit management education is too broad to provide an academic home for fundraising. Marketing or public relations, respectively, are more viable options. Furthermore, some participants claimed that nonprofit management is an inappropriate home for fundraising because it is too practitioner-oriented. A professor of communication said:

> As far as the research goes, the things that I have seen in nonprofit management journals tend to be very practitioner-oriented. They are not really offering a lot of theoretical insights, but they are very helpful in managing the day-to-day activities of a nonprofit. So, you will see research pieces on how to improve lobbying efforts, how to better retain volunteers, but you are not getting those theoretical insights that can help advance knowledge as a whole.

A researcher in organizational behavior, with an undergraduate degree in journalism and a master's in nonprofit management, defended nonprofit management education but also emphasized its weaknesses in regard to training fundraising practitioners:

> It was a very intellectually stimulating experience and I liked that about it. It was very broad, so I got a lot of different information. From a fundraising training perspective, that is not what made me a good fundraiser. What made me a good fundraiser was on-the-job training, the relational skills I developed as an undergraduate journalism student, and my natural aptitudes. . . . It was mentoring and it was people who worked with me and took me under their wing and taught me how to do it.

This viewpoint underscores the value of practical education for fundraising practitioners. It also demonstrates that academic training, particularly in the discipline of nonprofit management, currently falls short of providing the same degree of necessary knowledge and skills as the existing apprentice system in the practice of fundraising.

Brief Summary of Results

Results of this study showed there is no consensus among participant scholars about an academic home for fundraising, where the high-demand and critical occupation can be taught and studied through research and theory development. Even though marketing and other business

disciplines were the most commonly recommended homes, there was an over-representation of business scholars skewing the results. Additionally, opposing views on the subject and related topics were found. Importantly, although participants favored their own discipline, they were reluctant to recommend just one discipline as an appropriate home for fundraising. Instead, they preferred to name several disciplines that have the potential to contribute to expertise needed to practice and conduct research on fundraising.

Among the options suggested by the literature, marketing was the most popular choice of participants, who—by design—are the authors of most of the recent scholarly articles on fundraising. Yet a minority of participant scholars advocated different views and did so with convincing arguments. They opposed marketing and other business-related approaches; some recommended public relations as an appropriate academic home for fundraising. Nonprofit management was supported as a supplement discipline, but was deemed too broad to serve as an academic home for fundraising. Of the three academic home options, public relations was the least known among these participant scholars.

CHAPTER 5
DISCUSSION

This chapter discusses and interprets the results presented in chapter four and draws conclusions. Implications of the findings are divided into three sections: implications for fundraising education and research, implications for fundraising practice, and implications for the public relations discipline. Limitations of the study are discussed, and suggestions for future research are presented. The chapter ends with final conclusions.

Implications for Fundraising Education and Research

As reported in chapter four, most scholars believe their discipline is the best place in which fundraising should be housed. This is understandable, but it keeps the field in a stagnate position because dialogue is not occurring between disciplines. This study showed the differences in beliefs among scholars about how fundraising should be studied.

Also, a trend of educating students in an interdisciplinary fashion emerged from comments made by participants. While a broad-based education on the undergraduate level is a popular idea, believing that fundraisers can be educated in a variety of different disciplines still leaves fundraising homeless in academia. Perhaps one thing that can be gleaned from this study is that scholars may further develop their opinions about fundraising's academic home because the issue was brought up for discussion.

At least one-fourth of the interviewees mentioned that he or she had never considered many of these issues before. Each had thought about fundraising education and research and had opinions, but many had never considered the need for an academic home for the occupation and organizational function. One marketing scholar remarked, "I had more opinions on this subject than I thought!" An important ramification of this study is exactly this, raising the issue of a need for an academic home.

Those scholars who have considered the topic may also become more curious about all sides of the argument. This could possibly lead to an increased dialogue across disciplines about the issue of academic home.

Scholars were also divided on whether or not current fundraising education is too practical, or too theoretical. Some believed that fundraising education concentrates too much on theory and not enough on practice; and some believed that it concentrates too much on practice and pays little attention to theory. Scholars were probably basing these perceptions on their own experiences in fundraising education. In actuality, fundraising education seems to be taught more from a practical aspect, than a theoretical one. However, both the practical and the theoretical are in need of being improved and expanded. The organizational management scholar, who endorsed educating students through "pracademics," was on the right track. Fundraising course, especially on the undergraduate level, should include an even mix of theory and practical knowledge. This gives students the background necessary to become fundraising practitioners, or continue their education and become fundraising scholars.

An interesting divide that was mentioned in chapter four were the differences in participants' definitions of fundraising. Those that came from a business background described fundraising mainly as the process of raising funds for organizations, except for one management scholar. Those that came from other areas were more likely to describe fundraising similarly to Kelly's (1998) definition—where building relationships is primary and financial matters are secondary. It should be noted that many of those that came from a business background did mention relationships at some point in their interview—but it was secondary to raising funds. It seems that the business perspective comes mainly from a sales approach, and the other backgrounds come from a relationships approach. It is obvious that if scholars have different

opinions about definitions of fundraising, then their opinions about academic homes are going to be different as well.

When discussing the best theoretical background for fundraisers, the diverseness of the responses was enormous. This was the one question that almost every scholar answered differently. Everyone had a good explanation behind their answer, but it demonstrates the lack of consensus about the field of fundraising. Surprisingly, about one-third of scholars were caught off guard by the idea of a theoretical basis for fundraising, which suggested they had given little thought to the matter—even though they are scholars who have studied fundraising. This also points to the need for an academic home, because without it, the theory will remain stagnant and not advance towards a major paradigm. A core set of theories needs to be developed and tested through research to move towards a paradigm of fundraising. However, if every scholar has a different theory to champion, this will never happen.

While scholars are well-versed in research methodology and statistics for fundraising, they were less knowledgeable about theories of fundraising. This may suggest that many are more concerned with running the financial numbers than the theory behind the practice. However, at least four of the scholars had backgrounds in accounting, which would explain the need to quantify fundraising research. The research that is being produced is not as concerned with building theory, than it is with finding practical solutions. This poses a challenge to the field of fundraising to build and create theory, but also leaves room for tremendous opportunity.

The topic of professionalization opened up an interesting dialogue for fundraising to consider. Some do not think it is necessary for fundraising to become a profession—because of licensing, or because he or she just does not feel that it is necessary. Because of the many volunteers and lack of fundraisers, licensing would probably not be a good idea for the field.

Although the other criteria of a profession: ethics, education, and theory and research are all worthy of improvement in the field of fundraising. It will take more than further research to move towards professionalization, it will require the right type of research. This research should work towards building theory and ethical principles within the field of fundraising. Also, more research needs to be conducted to find the most appropriate education for fundraisers, and a general fundraising curriculum needs to be established. As mentioned before, this curriculum cannot be created until an academic home is established for fundraising.

Implications for Fundraising Practice

As discussed in chapter one, there is a current shortage of fundraisers in the United States. If the shortage is going to be eliminated, fundraising must find a discipline to call its academic home. Skilled and trained fundraisers will be needed for the survival of nonprofits in the future with the increasing size of the nonprofit sector adding greater competition for every donation. While it is good that the nonprofit sector is growing, it is important to realize this adds greater responsibility to fundraisers. Likewise, it adds greater responsibility to educators and scholars of fundraising.

How future fundraisers are trained will have direct implications to how they practice fundraising in the future. Furthermore, if there continues to be a lack of fundraising training, there will continue to be a lack of fundraisers. If programs of formal education are created for fundraisers, there would be an increased interest in the field and an increased confidence in young fundraisers. More fundraisers would end up in their jobs intentionally, instead of accidently.

This study also revealed the differences between the approaches of marketing, business school approaches and communication disciplines. Throughout the interviews, a trend that seem to appear from those that favored marketing, is that the donor is a consumer. Those outside of

marketing did not view the donor in this light. It goes back to the importance of the organization and donor relationship that those scholars outside of business seemed to hold strongly to, and those in business view as secondary. Fundraising practice can go one of two directions in the future: the donor is viewed as a consumer, or the donor as a friend of the organization.

Implications for the Public Relations Discipline

Public relations was not supported in large numbers as the primary academic home among fundraising scholars participating in this study. Results show that while many of the scholars advocate relationship fundraising, they do not necessarily relate it to public relations education or research. This seems to be caused by a lack of knowledge about public relations and its ability to serve as an appropriate home for fundraising. Also, there are many scholars who believe that marketing presents the best framework and, from their viewpoint, public relations is only a small part of that framework. This may be due to an unawareness of public relations theory and practice. It seemed as though public relations stereotypes were believed by more than a few of these scholars. This may be attributed to an unawareness of the discipline.

One important point may be made for public relations scholars and practitioners: those outside the field still are not aware of what public relations practice actually accomplishes. When a scholar opposed public relations, it seemed as though he or she was not clear on what the public relations function accomplishes. Now, this was not the case for all scholars that were opposed to public relations; some of them were familiar with the work of Kelly (1998) and other public relations strategies. An important finding that can be taken from this study is that public relations needs to engage in more public relations for itself and the function it serves. If it does not, the dialogue that is needed between marketing and the communication professions will never occur—because marketing will be unaware of the need for dialogue.

> As one public relations scholar summarized so well about those outside the field: They are somewhat resistant to accepting those beliefs or those viewpoints because they have a very different outlook on things. They are looking much more at the practitioner or applied side rather than bringing in a theoretical perspective to purely understand it. . . . We all are publishing and doing research on fundraising, but we are not making a very solid effort to try to bring everything together. And, in part it happens with public relations as well, that we are not very good at branching out to other disciplines to see what they can offer. So, I would love to say that I see fundraising research really moving forward and really uniting behind one discipline or the other. Until we start really trying to make that effort to reach out to other journals, other disciplines, I am not sure how well we are going to be able to do that.

Public relations, as well as other disciplines, needs to branch out to other fields in the case of fundraising. To paraphrase one public relations scholar, many research institutions expect their scholars to publish in certain journals in their discipline to add strength to his or her curriculum vitae. These journals are generally not read by people that are interested in fundraising research. He pointed out that this segments the research, and if institutions are serious about taking multidisciplinary approaches, it will work to change this pattern. Public relations, as a discipline, can work towards encouraging its scholars to publish fundraising research outside of the field's journals.

This study shows that many are open to the idea of public relations, but not as the main discipline in which fundraising operates. This seems to be because scholars are largely unaware of public relations process and theory. Most in business schools are aware of the four P's of marketing—why should not marketers be aware of the ROPES process of public relations? Outside of the public relations academic world, there are few that are aware of the work of Grunig, Grunig, & Dozier (2002) or even the fundraising work of Kelly (1998). Public relations needs to take a step forward making the business world aware of what it accomplishes. Public relations scholars need to look outside the *Journal for Public Relations Research* or *Public Relations Review* when publishing fundraising-related material. The same could be said for

marketing and nonprofit management needing to publish in journals outside their own disciplines.

This is not to say that public relations scholars should not be publishing fundraising articles in the field's journals—this would be a mistake. The general population in public relations needs to be more aware of the field's connection to fundraising. If fundraising is ever to find public relations as its home, public relations needs to embrace fundraising. For scholars to embrace something, they need to be acutely aware of its presence in the field. *Public Relations Theory II* (Botan & Hazelton, 2006) did not have one chapter devoted to fundraising or the nonprofit sector. Fundraising needs to be present in general public relations textbooks that are standard for graduate students, who are the future scholars of the discipline. Dialogue is needed between different disciplines that study fundraising, but in the end the field that is most passionate about fundraising is going to be where it finds its home. As of now, there is no field that is passionate about it. Most of the scholars in this study were fundraising researchers secondarily and were researchers of nonprofits or their own discipline first.

The positive thing that public relations can take away from this study is that both scholars interviewed from public relations were more aware of *all* the research going on in fundraising, not just the public relations-based research. This suggests that public relations is ready to dialogue with the other two disciplines represented in this study. The scholars in the other disciplines were usually aware of one of the two other disciplines, but not about both fields. The two public relations scholars had obviously thought through their responses to the questions of definition and theory, unlike many scholars in the other disciplines.

Limitations of the Study

While the qualitative methodology of this study allows for rapport and a wealth of information to be collected, it also leaves room for researcher bias and interpretation. In this

case, the bias would come from a public relations standpoint. It would be interesting for this data to be analyzed from a marketing and a nonprofit management perspective.

A small amount of scholars participated in this study, which limits the results to only fifteen scholar's opinions. Additionally, this group of scholars was selected based on the criteria of publishing in certain academic journals from 2000 to 2007. If the criteria were widened, scholars who have published in other journals might have been included, or scholars who published articles before the year 2000 would have been interviewed.

This study also limited the participants to those studying fundraising in the United States. There are many scholars in other countries doing fundraising work, especially in the United Kingdom and Canada. Their opinions would have added another dimension to this study.

Telephone interviews also present a limitation to this study. If it were possible to conduct face-to-face interviews it would have been highly preferable to telephone interviews. This is because of the increased level of rapport and the ability for the researcher to read non-verbal cues throughout each of the interviews.

Another limitation of this study is that there was at least one prominent fundraising scholar that was not able to participate because of time restrictions. His opinions would have undoubtedly added to the study in a positive way.

Suggestions for Future Research

Finding an academic home for fundraising is a worthwhile subject for future research utilizing different methods and research participants. The researcher would recommend conducting a study similar to this one, except interview leading fundraising practitioners in the United States. The interview would inquire about their practices and their educational backgrounds, asking what was valuable and what was not valuable in their educational experiences for what they accomplish on a day to day basis. In this study, those with practical

experience had better thought-out opinions than those with purely academic experience. A study of this kind would be beneficial and provide rich information.

Another recommended study would include the same group of scholars participating in focus groups about this subject. If these scholars were able to talk about this topic amongst themselves in a focus group setting, findings may show more consensus about the topic. This study also opened up the idea of professionalization in fundraising and whether the field should be moved towards a profession. More research and dialogue would be vital to moving along the discussion about professionalization and its benefits and limitations.

A quantitative study surveying fundraising scholars, and perhaps nonprofits sector scholars in general is strongly recommended. This study would ask similar questions in survey format. Each scholar would rate his or her feelings about each discipline as an academic home on a Likert scale. To have a large enough sample for a quantitative study, the discussion would be opened-up to education scholars as well as scholars based outside of the United States.

Conclusion

One aspect that remains agreed upon is that fundraising research and education have room to grow and they are nowhere near where they need to be to improve fundraising practice. This study should point scholars toward developing dialogue between the fields that study fundraising—because it seems like a lack of communication in academia is a problem for fundraising. Most scholars seemed to believe that finding an academic home for fundraising is an idea worth pursuing, and it would move the discipline forward. Even though many had opinions about the best academic home for fundraising, most seemed to have an open mind about other ideas different than their own.

An academic home for fundraising is an idea that should be pursued further in academics and is important to the continued growth and sustainability of the nonprofit sector. Public

relations, as well as marketing and nonprofit management, have a ways to go to become fundraising's academic home. In order for fundraising to find its academic home, one of the three studied disciplines needs to claim fundraising as its own. While this study did not find the academic home for fundraising, it started a discussion about its importance. Perhaps this study has brought the issue one step further towards being resolved.

APPENDIX A
STUDY PARTICIPANTS

Scholars that Agreed to Participate
Listed by Journals in Which They Published an Article Dealing with Fundraising between January 1, 2000 and December 31, 2007

Nonprofit Management and Leadership

Janet S. Greenlee
Associate Professor
University of Dayton
School of Business Administration
Accounting Department

Elizabeth Keating
Visiting Assistant Professor
Boston College
Carroll School of Management
Accounting Department

William J. Ritchie, III
Associate Professor
Florida Gulf Coast University
Lutgert College of Business
Management Department

Richard D. Waters
Assistant Professor
North Carolina State University
The College of Humanities and Social Sciences
Department of Communication

Dennis R. Young
Professor
Georgia State University
Andrew Young School of Policy Studies

Nonprofit and Voluntary Sector Quarterly

Patrick Rooney
Professor
Director of Research at the Center on Philanthropy
Center of Philanthropy
Economic and Philanthropic Studies

Daniel Tinkelman
Assistant Professor
Pace University
Lubin School of Business
Department of Accounting

International Journal of Nonprofit and Voluntary Sector Marketing

Matthew J. Beem
Doctoral Candidate, Public Affairs and Administration
University of Missouri – Kansas City
Bloch School of Business and Public Administration
President – Kansas City
Hartsook Companies, Inc.

Angela M. Eikenberry
Assistant Professor
Virginia Polytechnic Institute and State University
School of Public and International Affairs
Center for Public Administration and Policy

Vicki Blakney Eveland
Professor of Marketing
Mercer University
Stetson School of Business and Economics

John B. Ford
Professor of Marketing and International Business
Old Dominion University
College of Business and Public Administration
Department of Marketing

Margarete Rooney Hall
Associate Professor - Retired
A state university in the Southeast
College of Journalism and Communications
Department of Public Relations

Fred Jacobs
Professor
Auburn University at Montgomery
School of Business
Department of Accounting and Finance

Nicholas P. Marudas
Associate Professor
Auburn University Montgomery
School of Business
Department of Accounting and Finance

Sandra Mottner
Associate Professor
Western Washington University
College of Business and Economics
Department of Finance and Marketing

APPENDIX B
INTERVIEW GUIDE

Q1: How did you first become interested in fundraising research?

Q2: What is your definition of fundraising?

Q3: Summarize your perception about the current state of fundraising research:

Q4: Summarize your perception about the current state of fundraising education:

Q5: In your opinion, what is the best higher educational background for those pursuing a career in fundraising?

Q6: What is the best educational background for those interested in conducing research on fundraising? Is it different?

Q7: If research and practitioner education are not the same: Why are the two not the same? What is the difference?

Q8: In your opinion then, what academic discipline or disciplines should be the "academic home" for fundraising at the bachelor's degree level? At the master's degree level? At the doctoral degree level? Why?

Q9: What is the major theoretical framework within which fundraising should be practiced?

Q10: Most observers would not define fundraising as a profession in terms of the common criteria, such as a body of knowledge based on theory and research, a program of formal education, and a code of ethics. In your opinion, what is the most important thing that needs to change in order for it to become a profession? Is it important for fundraising to move towards professionalism at all?

The next few questions seek more detail about your opinions regarding fundraising education:

Q11: If a high school senior, who plans to pursue a career in fundraising, came to you asking for advice about which academic major to pursue in his or her undergraduate education, what would you tell this student to do about which specific academic institution to attend for undergraduate education, where would you tell this student to go?

Q11b: If the same student asked your advice about which specific academic institution to attend for undergraduate education, where would you tell this student to go?

Q12: If a college senior, who plans to pursue a career in fundraising, came to you asking for advice about which academic major to pursue in his or her graduate education, what would you tell this student to do?

Q12b: If the same student asked your advice about which specific institution to attend for graduate education, where would you tell this student to go?

Q13: If public relations has not previously been brought up: Are you familiar with studying fundraising as a sub-function of public relations? If yes, what are your views on this approach?

Q14: If marketing has not previously been brought up: Are you familiar with studying fundraising as a sub-function of marketing? If yes, what are your views on this approach?

Q15: If nonprofit management has not previously been brought up: Are you familiar with studying fundraising as a sub-function of nonprofit management? If yes, what are your views on this approach?

Q16: How many years of experience do you have as a full-time, tenured and tenure-track academic?

Q17a: Have you ever taught a course in which fundraising constituted 50 percent or more of the course content? If yes, how many sections of such courses have you taught in your career?

Q17b: Approximately how many publications, including journal articles and book chapters, have you authored that deal primarily with fundraising?

Q17c: Are you a paid member of any academic or professional associations dealing with fundraising, such as ARNOVA, AFP, CASE, or AHP?

Q18: How many years of full-time professional experience do you have outside of academics? Please describe your professional experience, emphasizing positions you've held that are directly related to fundraising and/or nonprofit management?

Q19: In what discipline did you receive your bachelor's degree? Your master's degree? Your doctoral degree?

Q20: That is all I have to ask. Do you have any other comments to add about this subject?

Q21: Would you be interested in receiving a summary of the results of this study?

Fundraising research conducted: _____

Article and publication: _____

Current employer: _____

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BIOGRAPHICAL SKETCH

Catherine Elizabeth Mack, the oldest of six children, was raised in Boca Raton, Florida by parents Glenn and Betsy Mack. For her undergraduate education she attended University of the Cumberlands in Williamsburg, Kentucky, where she received a Bachelor of Science degree in 2006 with a major in communication arts and minors in business administration, political science, and religion.

She came to the University of Florida in fall 2006 to pursue a Master of Arts in Mass Communication with a specialization in public relations. After her graduation in 2009, she plans to work in communications for a nonprofit organization.