HOW AND WHY FUNDRAISERS USE SOCIAL MEDIA: A NATIONAL SURVEY OF THE PRACTICE

By

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To my parents, Jan and Curtis Lord
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Americans’ social media use steadily increased in recent years. Since successful fundraising relies on communication with donor publics, practitioners have expressed interest in learning how social media applies to fundraising. Through an e-mail survey of the Association of Fundraising Professionals’ American membership (N = 147), this study provided the first scientific benchmark of fundraisers’ social media use. Approximately 42% of respondents reported using social media in their work and provided detailed data on how they apply social media to the fundraising process. Related to minority usage, only a few of the fundraiser respondents believed that a majority of their organization’s donor publics, as measured by the three groupings, use social media.

Based on scholarly and practitioner literature on fundraising, public relations and technology use, this study presents a theory of social media use in fundraising. The theory posits that social media can be applied to the research, programming and stewardship steps of the fundraising process. Working inductively from practitioner literature, as well as adapting items previously developed by scholars, this study created an original scale to evaluate the extent to which practitioners apply social media to research, programming and stewardship. The study’s findings reveal that, to a modest degree, fundraisers currently are applying social media to the
programming ($M = 5.78$, $SD = 1.79$), stewardship ($M = 5.00$, $SD = 1.83$), and research ($M = 4.82$, $SD = 2.26$) steps of the fundraising process as theorized.

The theory of social media use in fundraising posits that the combination of the Technology Acceptance Model’s (TAM) predictor variables—perceived ease of use, perceived usefulness and behavioral intention—as well as other independent variables suggested by scholarly and practitioner literature—perceived donor use of social media, perceived organizational use of social media, fundraisers’ ages and size of the fundraising department—explain fundraisers’ use of social media. The model significantly predicted 48% of the variance in practitioners’ actual social media use.

Finally, the study’s findings demonstrate it may not be appropriate to collapse Kelly’s (1998a) four fundraising roles into a two-role typology, as was the case in public relations research. Moreover, the study’s findings suggest a new three-role typology might better explain the current fundraising behavior of AFP members. Two new fundraising roles are conceptualized.
CHAPTER 1
INTRODUCTION

This chapter discusses the purpose of the study and the study’s contribution to scholarship in public relations and nonprofit management. To best understand the significance of this study, however, it is first necessary to review five topics: (1) the importance and scope of charitable organizations in the United States, (2) the importance of fundraising to charitable organizations, (3) Americans’ use of digital and social media, (4) the use and implications of digital and social media in public relations and fundraising, and (5) practitioners’ use of social media.

Importance of Charitable Organizations

Though frequently a source of confusion among the general public, a nonprofit organization is not synonymous with a charitable organization. The U. S. tax code recognizes 26 types of nonprofit organizations, which are exempt from federal income tax. Many of the 26 types engage in activities that are not inherently philanthropic or charitable (Internal Revenue Service [IRS], 2008). For example, fraternities, cemeteries, and social clubs may all be classified as nonprofit organizations and receive tax-exempt status, though their work is not inherently philanthropic. Those nonprofit organizations whose work can be described as charitable or philanthropic are classified under section 501(c)(3) of the U.S. tax code.

Charitable organizations are a diverse group of organizations. They may be divided into eight types, roughly based on the definition offered by the IRS: (1) arts, culture, and humanities, (2) education and research, (3) environmental and animals, (4) healthcare services, (5) human services, (6) public and societal benefit, (7) international and foreign affairs, and (8) religion (IRS, 2008). The largest group of charitable organizations is human service organizations (35%), followed by education (18%), health care (13%), public and societal benefit (12%), and arts,
culture, and humanities (11%). As this breakdown indicates, charitable organizations provide a diverse array of services.

The precise number of U.S. charitable organizations is difficult to pinpoint. The most comprehensive list of American charities is the IRS’s list of reporting organizations, but many charitable organizations are exempt from reporting their activities to the federal agency. Due to separation of church and state in the U.S., religious organizations are not required to apply for tax-exempt status or file annual IRS Form 990, the charitable organization’s equivalent of a tax return (National Center for Charitable Statistics [NCCS], 2007). It is estimated that half of the approximately 350,000 U.S. religious organizations file annual tax returns. Like religious organizations, very small organizations, those with less than $25,000 in annual revenue, are not required to file annual IRS Form 990s (Independent Sector, 2007). Based solely on IRS records, there were approximately 1.4 million charitable organizations in the United States in 2006 (IRS, 2008). Furthermore, IRS records demonstrate that the number of charitable organizations in the United States has steadily increased over the past 10 years. From 1987 to 2006, charitable organizations grew at double the rate of the private sector (Independent Sector, 2007). Still, most of these charitable organizations are small, with 73% reporting annual expenses of less than $500,000 in 2006. Only 4% of charitable organizations filing with the IRS had annual expenses over $10 million.

Salamon (2003) asserted that "the nonprofit sector is one of the most important components of American life" (p. 7). Writing in the early 2000s, he said the sector consisted of 1.2 million organizations, employing 11 million people or 7% of the American workforce. Though many Americans are unaware of their very existence, these organizations play crucial roles in national and community life. For example, charitable organizations are largely
responsible for the delivery of services such as hospital care, higher education and community development. U.S. charitable organizations play a critical role in improving our communities by providing disaster relief, stimulating creativity in the arts and sciences and supporting the vulnerable or needy (Independent Sector, 2007). Similarly, charitable organizations work as advocates who identify “unaddressed problems and bring[ing] them to public attention, by protecting basic human rights, and by giving voice to a wide assortment of social, political, environmental, ethnic, and community interests and concerns” (Salamon, 2003, p. 11). Due to their roles as advocates, Kelly (1998a) argued charitable organizations are critical to the very survival of democracy: "Without the sector's public space, without the public discourse it nurtures, and without the public voice it bestows, one can convincingly argue that our democratic society would not long survive" (p. 57).

Although charitable organizations greatly enrich Americans' lives through the services they provide, research on the sector was largely nonexistent throughout most of our country's history but has expanded in recent years. In The State of Nonprofit America, Salamon (2002) paints a picture of scholarship in the nonprofit field: "The literature on America's nonprofit sector has burgeoned in recent years. Long an obscure backwater inhabited by a small band of dedicated mavericks, the field of nonprofit studies has swelled into a mighty stream" (p. ix).

**Importance of Fundraising to Charitable Organizations**

In addition to exemption from federal income tax, charitable organizations are able to receive charitable gifts for which the giver receives a tax deduction (Kelly, 1998a). This is due to the government’s recognition that charitable organizations’ actions benefit a broad interest, as opposed to simply benefitting the interests of their members, as do many other types of nonprofit organizations (Independent Sector, 2007).
Though charitable organizations receive funding from other sources, including the government and dues and fees, charitable gifts from individuals, corporations, and foundations are a consistent source of support. As a group, charitable organizations received 70.9% of their revenue from fees for services and goods, approximately 4% from income from investments, 9% from government grants, approximately 4% from other sources, and 12.5% from private contributions (NCCS, 2007). The Giving USA Foundation estimated charitable giving to be $307.65 billion in 2008, exceeding $300 billion for the second year in a row in the worst economy since the Great Depression (Giving USA Foundation, 2009). The largest source of charitable gifts was individuals (75%), followed by foundations (13%), charitable bequests (7%), and corporations (5%). Religious organizations received the most gifts (35%), followed by human services (16%), education (13%), foundations (11%), public-society benefit (8%), healthcare (7%), arts, culture, and humanities (4%), international affairs (4%), and environment and animals (2%).

Because charitable gifts represent a vital source of support for charitable organizations, many hire fundraisers to generate these gifts. Kelly (1998a) went so far as to suggest fundraising is essential to the very survival of the nonprofit sector, which in turn is essential to the survival of our democratic society. Her 1998 estimate suggested that about 80,000 individuals were then employed as full-time fundraisers in about 150,000 U.S. charitable organizations. Today, the author estimates that about 100,000 individuals are employed as full-time fundraisers in the United States (K. Kelly, personal communication, April 23, 2008).

Though fundraisers work in organizations with diverse missions, the number of fundraisers employed varies by type of organization. Generally, education and healthcare charitable organizations, which are the wealthiest subsectors, employ the most fundraisers and
have the most sophisticated fundraising functions (Kelly, 1998a). These individuals’ work in managing relationships with current and potential donors supports nonprofits in addressing their organizations’ missions. How fundraisers manage relationships with donor publics will be discussed in the following section.

**Americans’ Use of Digital and Social Media**

Recent studies emphasized the changing communication habits of the American population. USC Annenberg and Ketchum (2008) reported that, though still substantial, use of traditional media such as television, newspapers, radio and magazines decreased steadily since a 2006 benchmarking study by the same authors. The Pew Internet and American Life Project (2009) reported that over 75% of U.S. adults are now Internet users, which, at a minimum, entails occasionally going online to search the World Wide Web or to send and receive email.

Universal McCann (2008) collected data across a three-year period and reported the use of social media platforms had steadily increased. That study defined social media as digital media emphasizing interaction, collaboration and sharing of content and identified the following key platforms: RSS feeds, microblogging, blogging, photosharing, videosharing, podcasts, message boards, widgets, social networking sites and chat rooms. The study reported that 60.3 million Americans read blogs (42% read weekly and 23% read daily), and 26.4 million had started a blog. Using a different research method, eMarketer (2008) reported that half of the approximately 188.2 million American Internet users (94.1 million) read blogs and 22.6 million Americans author blogs. Though these figures differ, they demonstrate the pervasive nature of this media. Universal McCann (2008) reported 43 million Americans had a profile on a social network, 33% updated daily and 32% updated weekly. ComScore (2008) reported that roughly three-fourths of the online American population use social networking Web sites such as Facebook and Myspace. These sites had 41 million and 75 million members, respectively.
Lest fundraising practitioners assume the Internet, and social media, are exclusively the domain of the very young, studies have shown that use of both is growing among older generations of Americans. Pew (2009) reported that although over half of Internet users are between ages 18 and 44, 72% of adults ages 50 through 64 and 41% of those 65 and older now use the Internet, and these figures are slowly but steadily increasing. The authors emphasized that younger and older generations still use the Internet differently, the former primarily for entertainment (i.e., playing online games, downloading music, watching videos) and communication (i.e., blogs, social networks, instant messaging) and the latter to search for information, send and receive email, shop and bank. Some online activities, however, are now enjoyed equally across generations. Examples include video download, making online travel reservations, online banking and work-related research.

USC and Ketchum (2008) reported that, since their 2006 benchmark study, use of “digital/social media” such as blogs and social networking sites increased among the general population, including those in the “44+” and senior categories. Pew (2009) reported that although 65% of online teens use social networks, compared to 35% of online adults, the latter constitutes the larger group and dominates these sites. Although 75% of adult social network users are between ages 18 and 24, 7% are now 65 or older. Technorati’s (2009) State of the Blogosphere study randomly sampled the 1.2 million blog authors registered with that site and found the largest age group of bloggers was 25 to 34 years old (36%), followed by 35 to 44 (27%), 45 to 54 (15%), 18 to 24 (13%) and 55 years or older (8%). In short, these figures suggest that—while the use of traditional media is still substantial—the use of digital and social media continues to increase, even among older populations of Americans. As will be discussed in the next section, these figures have important implications for professional communicators.
Use and Implications of Digital and Social Media in Public Relations and Fundraising

As just discussed, the use of digital and social media has grown among the American population. As a result, professional communicators are beginning to consider how they can apply social media to their work. Before addressing how this technology relates to public relations and fundraising, the current study turns its attention to the difference between organizational communication strategies involving Web 1.0 and Web 2.0, often called social media.

Defining Social Media

Web 1.0 technology involves creation of read-only Web content by an exclusive group, such as representatives of an organization, who then upload it through servers so that Internet users may download and view the content, which they have no ability to alter (Pavlik, 2007). Importantly, Web 1.0 technology did not truly alter how public relations practitioners communicated with target publics, rather, it provided a new vehicle for message delivery. For example, the Web site has largely replaced items like brochures for conveying organizational information to key publics.

Web 2.0, on the other hand, has democratized control of Web content by enabling a vast number of users to create their own content, share that content and alter existing Web content. Examples of Web 2.0 technology include online video, Web logs, newsgroups or forums, social networks, podcasting, photo sharing, wikis, social bookmarking, instant messaging, music sharing and virtual worlds, such as Second Life (Gillen, 2008). An example of how an organization incorporates Web 2.0 technology into its communications would be hosting a Web log on which visitors can read and respond to the organization’s messages, posting their comments directly to that Web log. In this environment, stakeholders can publicly communicate with the organization and with each other about the organization, which is not in control of these
messages. In that Web 2.0 technology focuses on community, interaction, collaboration and sharing, Universal McCann (2008), a media-marketing consultancy firm with clients such as General Motors and Coca-Cola, argued that social media is a preferable term for this technology. The term social media will be used throughout this study.

**Practitioner Studies on Social Media in Public Relations and Fundraising**

Benchmarking studies by both public relations and fundraising practitioners have demonstrated the extent to which social media is currently used in these communication professions. Not only are practitioners beginning to integrate these technologies into their work, but they believe social media has the ability to enhance their profession. A study conducted by the Society for New Communication Research, in conjunction with the Institute for Public Relations and Wieck Media, reported by Gillen (2008), found that most of the communication professionals polled had used blogs, online video, social networks and podcasts in communication programs. Wright and Hinson’s (2008) study of public relations professionals revealed that most practitioners in their convenience sample had used social media on the job and agreed that social media provided a low-cost means of building relationships with key publics and monitoring key publics’ conversations about the organization.

Studies focusing on nonprofit organizations, particularly their fundraising efforts, have demonstrated trends similar to the public relations studies just reviewed. *The Chronicle of Philanthropy*’s (2009) annual online giving study reported that 41% of the Philanthropy 400, a group of top-fundraising American charities, had experimented with blogging, instant messaging and other social media technologies to raise money. A survey of communication professionals working in charities conducted by the Nonprofit Technology Network (NTEN) in conjunction with Common Knowledge and The Port (2009) found that 86% of the charities polled maintained an organization profile on at least one social networking site, such as Facebook or Myspace.
Practitioner work has hinted that social media might effectively be applied to the fundraising process. Ted Hart (2005), founder and former president of the ePhilanthropy Foundation, held that not only can charitable organizations effectively build relationships in the electronic environment, but also that steps of fundraising’s strategic process can be carried out in the electronic environment. Several authors described how social media might be applied to isolated steps of the fundraising process. For example, Hart (2005) argued organizations can research prospective donors using online databases, deliver messages to communicate with, educate and ultimately solicit donor publics using the Internet. Waters (2007a) provided specific suggestions for how stewardship could be conducted on the Internet, some of which incorporate social media. For example, organizations can continue to nurture relationships with donor publics by holding virtual events or chat sessions. Gillen’s (2008) report presented case studies that emphasize organizations are integrating social media into communication programs to research key publics and to engage these publics in dialogue.

Missing is comprehensive work that clearly articulates how fundraising practitioners can apply social media to the entire fundraising process and specifies the points at which it is not appropriate to do so, and why. This will become increasingly important over time, as more practitioners consider integrating social media into their programs.

Explaining Practitioners’ Use of Social Media

Despite reported interest in social media among practitioners, limited scholarly research has addressed how the phenomenon of social media applies to the professions of public relations and fundraising. Wright and Hinson (2008) noted that the public relations field expresses interest in social media through “the trade press, from reports written on behalf of some of the world’s largest public relations firms and from practitioners who have written books and articles
on the subject,” but “few academic articles about blogs or social media appear in the public relations scholarly literature” (p. 4).

Most of the scholarly public relations research on social media has focused on Web logs, or blogs, online public diaries in which readers can respond to the author’s or blogger’s messages. Researchers argued that, because blogs impact the media agenda, impact the public agenda and hold strong credibility with readers, they are an effective, fast and economical way of engaging key publics in two-way communication (Porter et al., 2007). Several authors argued public relations practitioners should monitor blogs to identify emerging issues and pitch stories to bloggers as they would to traditional media outlets (Porter et al., 2007). Seltzer and Mitrook (2007) used Kent and Taylor’s (1998) five dialogic principles of building online organization-public relationships to examine the potential of Web logs for building online relationships, as compared to traditional Web sites, and concluded that blogs were much better suited for online relationship-building. Similarly, Wright and Hinson (2008) argued that “the ability of blogs to facilitate two-way communication offers tremendous possibilities for the enactment of excellence theory” (p. 9).

Some studies in the public relations literature have attempted to describe or prescribe how charitable organizations use social media in their communications efforts. Seo, Kim and Yang (2009) surveyed communication representatives from non-governmental organizations (NGOs) based in America and reported that promoting the organization’s image and fundraising were the two most reported uses of social media. Based on their extensive review of practitioner literature, Waters, Burnett, Lamm and Lucas (2009) theorized nonprofit organizations could use Facebook profiles to enhance disclosure, disseminate information and involve target publics in the organization, though their content analysis of organizations’ Facebook profiles revealed only
the first strategy was effectively integrated.

Focusing on public relations, many of the practitioner benchmark studies previously reviewed suggest that the key to understanding practitioner use of social media may be in exploring individuals’ perceptions of social media. For example, Gillen’s (2008) summary of the findings of the *New Influencers* study suggests there is a correlation between perceptions of how useful a social media type was in accomplishing communication goals and frequency of using that type of social media, though that study did not actually study this relationship.

**The Technology Acceptance Model**

Social psychology offers several theories that explain individuals’ behavior based on their cognitive activity. Davis (1986, 1989) adapted the Theory of Reasoned Action (TRA) to the field of information systems (IS) research, which explores individuals’ use of technology. The author then presented the Technology Acceptance Model (TAM) (see Figure 1.1). Like the TRA, the TAM posits that individual behavior, in this case use of a specific information system, is a result of individual behavioral intention to use the information system. Behavioral intention is a function of both the individual’s perceived usefulness and perceived ease of use for the technology in question. The former is seen as being directly impacted by the latter.

![Figure 1-1. The Technology Acceptance Model as Presented by Davis (1986, 1989).](image-url)
The TAM has also proven to be useful to communication scholars, particularly for predicting consumer reactions to advertising and marketing strategies involving new technology, such as text message advertising (Zhang & Mao, 2008), online and mobile auctions (Wang & Barnes, 2009) and mobile commerce (Lee & Jun, 2007; Yang, 2005).

**Roles Theory**

Roles theory, a theory of public relations practitioner behavior, when combined with the TAM, might help explain how and why public relations and fundraising practitioners use social media. Katz and Kahn (1978) defined a role as “the set of recurring actions of an individual, appropriately interrelated with the repetitive actions of others so as to yield a predictable outcome” (p. 189). Based on Katz and Kahn’s work, Broom and Smith (1978) conceptualized a set of four roles enacted by public relations practitioners, which Kelly (1998a) adapted to present four roles to explain the behavior of fundraisers. In the **liaison** role, fundraisers act as “facilitators, interpreters, and mediators in bringing together organizational representatives with perspective donors” (Kelly, 1998a, p. 194). As liaisons, fundraisers are essentially consultants, who do not actually solicit gifts but counsel organizational representatives on doing so. In the **expert prescriber role**, fundraising exists in a silo. Practitioners plan and execute fundraising programs without involvement from upper management. As **problem-solving process facilitators**, fundraisers act as both consultants and managers, collaborating with management to guide the organization through the fundraising process. In the **technician role**, fundraisers are not involved in strategic planning, but rather implement the programs designed by management and produce techniques or tactics required for these programs.

L.A. Grunig, J.E. Grunig and Dozier (2002) argued that “role enactment offers a useful framework for thinking about communication and technology” (p. 216). Although many studies utilizing role theory have been conducted, only a handful have explored how role predominantly
enacted relates to practitioners’ use of technology and perceptions of technology. Summarizing results, these studies found that managers and technicians do use technology differently and have different perceptions of new technology (Anderson & Reagan, 1992; Johnson, 1997; Kelleher, 2001). None of these studies were conducted before the popularization of social media.Both the TAM and fundraising role theory will be discussed in more detail in Chapter 2.

Purpose of the Study

As described in this chapter, the use of digital and social media by Americans is increasing. Practitioner benchmarking studies from both public relations and fundraising have demonstrated that, recognizing this trend, practitioners in these fields are beginning to integrate social media into their work and believe social media have the potential to enhance their professions. In that fundraising is a communication function that relies on effective communication with current and potential donors, it is important that fundraisers understand how to effectively integrate social media into the fundraising process. Still, no scholarly research has clearly articulated how social media can be effectively applied to the fundraising process. This will be increasingly important as more practitioners begin integrating social media into their work.

A goal of this study is to, working inductively from prominent scholarly and practitioner fundraising literature, articulate a normative theory of how social media should be applied to the fundraising process. Through surveying fundraising professionals about their application of social media to the fundraising process, the study will also test this normative theory, or demonstrate the theory explains how practitioners apply social media to the fundraising process. Through randomly sampling U. S. fundraising practitioners, this study will be the first to describe how this group currently applies social media to the fundraising process. Moreover, this study will provide a roadmap for practitioners wishing to apply social media to the fundraising
process as well as a guide for educators needing to prepare future fundraisers to integrate these tools into their work.

A second goal of the study is to explain why fundraising professionals use social media in their work. As described in the previous sections, both roles theory and the TAM provide useful potential frameworks for explaining practitioners’ use of social media. The TAM has already been extensively, and fruitfully, applied to the study of professional communication. The study will further validate the TAM by extending it to the study of fundraising to explain why fundraising practitioners use social media in their work. Moreover, scholarly and practitioner literature suggests several additional variables which can potentially explain fundraisers’ use of social media. Through using roles theory to explain fundraisers’ use of social media, the study will help extend this fundraising theory by exploring its relationship to new variables, uses of social media in the fundraising process. The next section presents a review of the scholarly literature relevant to this study.
CHAPTER 2
LITERATURE REVIEW

To enable this study’s exploration of how and why fundraisers use social media, it is first necessary to review literature in the following areas: (1) fundraising as a specialization of public relations, (2) the use and implications of the Internet and social media in public relations, (3) the use and implications of the Internet and social media in fundraising, (4) explaining practitioners’ use of social media, (5) roles theory in public relations and fundraising, (6) the relationship between practitioner role and perceptions and use of new technology, and (7) uses of social media in the fundraising process. Reviewing these areas will help situate the study in the scholarly and practitioner literature. Hypotheses and research questions will be presented at the chapter’s conclusion.

**Fundraising as a Specialization of Public Relations**

In his widely used public relations text, Broom (2009) argued that fundraising is the part of a nonprofit organization’s public relations function which, like investor relations for publicly traded corporations, secures the financial support needed to operate the organization. The author defined fundraising as “a specialization of public relations in private nonprofit organizations that builds and maintains relationships with donors and members for the purposes of securing financial and volunteer support” (p. 23). The groups with which fundraisers build relationships include volunteers, alumni, members, donors and prospective members and donors.

Kelly (1991) provided the first scholarly argument that fundraising should be viewed as a specialization of public relations. Unlike Broom (2009), Kelly (1991) defined fundraisers as those working in charitable nonprofit organizations. As previously discussed, charitable nonprofit organizations are the only nonprofit organizations legally permitted to collect charitable gifts for which the donor receives a tax deduction. In that Kelly (1991, 1998a) views
fundraising as building relationships with donor publics—which she defines as individuals, corporations and foundations—some of the publics mentioned by Broom (2009) may not fall under the responsibility of fundraisers.

Kelly (1991) argued that “theoretical links between the two functions have been ignored in previous research because public relations scholars have not understood the fundraising function and those studying fundraising have limited the definition of public relations to techniques and publicity” (p. 329). As a result, fundraising previously had rarely been viewed as a specialization of public relations. In charitable organizations, fundraising has either been separate from public relations or public relations acts as a support role for fundraising. When dealing with publics other than donors, however, public relations is considered a primary function.

To support her argument that fundraising should be viewed as a specialization of public relations, Kelly (1991) points to J. E. Grunig and Hunt’s (1984) four types of stakeholders for an organization, based on their type of linkage to the organization: enabling, functional, normative and diffused linkages. Grunig and Hunt used these linkages to explain why public relations programs traditionally are targeted to different publics (e.g., government relations, media relations, or community relations). Kelly (1991) held that because donors of charitable nonprofits, like investors for publicly traded corporations, provide resources for an organization to survive and succeed, they constitute a major public with whom the organization must communicate.

Kelly (1991) also noted that, although many public relations practitioners associate fundraising only with publicity and soliciting gifts, fundraisers, on a departmental level, actually utilize a strategic management process similar to that utilized by public relations. L. A. Grunig, J.
E. Grunig and Dozier (2002) noted that strategic public relations should first identify the issues important to an organization, then segment publics based on how they respond to those issues. Similarly, fundraising practitioners conduct extensive research on prospective donors, looking not just for ability to give, but, most importantly, for a prospective donor’s linkage to the organization or interest in that organization’s mission or purpose for seeking gifts (Kelly, 1991).

On a micro level, Kelly (1991) asserted that the two functions share similar processes, objectives, programs, and techniques. For example, the commonly accepted four-part process for fundraising (research, cultivation, solicitation, and recognition), bears a striking resemblance to the commonly accepted formula for management of the public relations process (research (R), action (A), communication (C), and evaluation (E)) discussed in J. E. Grunig and Hunt (1984). Kelly (1991) noted that “the action and communication steps generally are interpreted as planning and executing communication programs, which correlate to the cultivation and solicitation stages of the fundraising process” (p. 345).

Additionally, Kelly (1991) argued that public relations and fundraising are very similar in that they use communication objectives to direct their actions (p. 346). Grunig and Hunt (1984) articulated five major communication effects for public relations programming: communication, retention of messages, belief in the cognition, formation or change in attitude, and affecting behavior. The authors noted that it is increasingly difficult to achieve these effects when moving from communication to affecting behavior, and that the only scenario in which behavior could be affected in the short-term, rather than the long-term, was when the program was aimed at a well-segmented public and supplemented with interpersonal support from members of that public. Similarly, Kelly (1991) held that the majority of fundraising programs use communication
objectives to create behavioral change in the long-term, but that when major gifts are sought in the short-term,

... are well segmented ... the behavior change sought is a simple one in that donor prospects are often previous donors to the same organization and are asked to make a gift in support of a specific project; the solicitation step is well executed, often scripted down to speaking points for each member of the solicitation team; and the solicitation frequently includes interpersonal support from a volunteer who is also a member of the segmented donor public (p. 348)

Finally, Kelly (1991) asserted that fundraising and public relations practitioners use exactly the same techniques, or tactics, to achieve their communication objectives and choose the specific technique to use based on the type of objective. Summarizing her thinking, mass communication techniques are utilized for more easily achieved objectives (communication objectives), while more difficult to achieve objectives utilize interpersonal communication techniques. For example, fundraisers typically use controlled media techniques such as direct mail for their annual giving programs, but reserve interpersonal techniques for major gift donors.

Kelly (1991) analyzed the job functions of the two positions, pointing out the strong similarities. Similarly, Hall (2002) found that the most successful fundraising programs were incorporating the best public relations practices into their processes. Based on her earlier work, Kelly (1998a) defined fundraising as “the management of relationships between a charitable organization and its donor publics” in her textbook entitled *Effective Fund-Raising Management* (p. 8).

**Use and Implications of the Internet and Social Media in Public Relations**

This review now turns its attention to the current body of research addressing the role of the Internet and social media in public relations. In that fundraising has been defined as a specialization of public relations, it is appropriate to first review public relations literature before turning to similar literature in the realm of fundraising and nonprofit management.
From Web 1.0 to Web 2.0

Some authors characterized the changing nature of Internet communication as a transition from Web 1.0 to Web 2.0 technology (e.g., Pavlik, 2007). As discussed previously, the primary difference between the two technologies lies in who has the ability to create and contribute to Internet content.

Web 1.0 involved creation of Internet content by select individuals, who then uploaded it through servers so that Internet users could download and view the content. In this type of technology, most individuals were consumers with no ability to create or impact content. Using Web 1.0 technology, the American Red Cross might host a read-only Web site to offer information about the organization’s history and programs.

Web 2.0 technology essentially democratizes control of Web content by enabling a vast number of users to create their own content, share that content and alter existing Web content (Pavlik, 2007). Examples of Web 2.0 technology were given earlier. An organization might integrate Web 2.0 technology into its public relations strategy by hosting a Web blog about organization activities to which readers can post their comments.

Universal McCann (2008) argued that social media is a preferable term to Web 2.0 in that it captures the emphasis on interaction, community, collaboration and sharing which are the essence of social media. That report emphasized that social media, itself, is not a new feature of Internet communication. On the contrary, peer-to-peer communication has existed since the Internet’s inception in the form of chat rooms and message boards. Changes in technology, however, have allowed the creation of a new breed of social media platforms that can be operated with very little technical expertise, leading to mass involvement in social media. This requires renewed attention to the phenomenon of social media on the part of professional communicators.
How Social Media Has Impacted the Practice

This section will discuss practitioner perspectives of how technologies associated with social media have impacted the practice of public relations, as well as the results of several practitioner studies that attempted to create benchmarks of social media use by practitioners. Then, this section will discuss the current state of scholarly research addressing use of these technologies by public relations practitioners.

Pavlik (2007), in his discussion of how new technology alters the practice of public relations, distinguished between Web 1.0 and social media technologies. The former did not truly alter the strategies utilized by public relations practitioners, while the latter demands new public relations strategies. Web 1.0 simply provided new technology that practitioners applied to existing public relations techniques, which were not fundamentally altered. In short, Web 1.0 provided new means of delivering controlled messages to target publics. An example the author provides is the video news release (VNR). The VNR is still essentially a press release, but Web 1.0 enabled the addition of a visual and audio component and a new means of delivery. Another example is an organizational Web site, which is a new means of delivering information about an organization to the public.

Pavlik (2007) noted that social media, on the other hand, allows an entirely different range of actions on the part of users, which alters how public relations practitioners must operate. For example, through Web logs, stakeholders can publicly communicate with each other about an organization, which is not in control of these messages. In this environment, strategic public relations must account for these unplanned messages and powerful stakeholders.

A few practitioner studies attempted to create benchmarks of social media usage among different groups of individuals and organizations. Goodman (2006) reported the findings of the Makovsky 2006 State of Corporate Blogging Survey, which polled executives of Fortune 1000
companies. That study’s respondents were generally unfamiliar with blogs. Although 96% of respondents reported having heard of blogs, 51% of that group reported having only a vague understanding of blogs. When presented with a list of possible definitions and uses of blogs, only 46% of respondents agreed that organizations could use blogs as an online promotional tool. Only 15% of respondents reported that a blog is maintained about the organization and its activities. That study, however, did not poll communication professionals.

Gillen (2008) reported findings of a study conducted by the Society for New Communication Research, in partnership with the Institute for Public Relations and Wieck Media. That study’s sample consisted of communication professionals (public relations, marketing and corporate communications) working in agencies, in-house and as consultants. Practitioners surveyed were all social media power users, or those with heavy usage patterns and deep knowledge of these new technologies. The study found that the most frequently used types of social media were blogs (78%), online video (68%), social networks (56%) and podcasts (49%).

Wright and Hinson (2008) explored the impact of social media on the practice of public relations by randomly sampling practitioners from a variety of relevant professional groups. In general, that study revealed practitioners felt social media enhanced the practice of public relations and practitioners had integrated social media into their work. The vast majority (96%) of respondents reported using social media on the job, most reported spending only between one and 10% of their work week using these technologies. Most respondents (58%) agreed that social media represent a low-cost way to build relationships with strategic publics and agreed that public relations practitioners should analyze the content of organization mentions in social media.
In short, this practitioner literature suggests that the phenomenon of mass social media use has the potential to impact, and enhance, the practice of public relations. Next, this review turns its attention to scholarly public relations research that has explored the phenomenon of social media use by practitioners.

**Academic Research on the Internet and Public Relations**

Most research has focused on how public relations can effectively integrate Internet technologies associated with Web 1.0, but research addressing public relations practitioners’ use of social media is gaining ground. The research dedicated to technologies associated with social media is still primarily confined to the exploration of Web logs.

Many authors have extolled the benefits of online public relations. Many researchers, embracing the common view of ideal public relations as a dialogue, have lauded the potential of the Internet for enabling this type of communication and criticized organizations for not taking advantage of this opportunity (Cooley, 1999; Kent & Taylor, 1998; Kent et al., 2003; McAllister & Taylor, 2007).

Kent and Taylor (1998) held that organizations are mainly using their Web sites as a means of one-way communication, disseminating press releases and organizational information and responding to crises. Similarly, Greer and Moreland (2007) examined Fortune 500 organizations’ use of the Internet in the aftermath of Hurricane Katrina and found that these organizations primarily used the Internet as a way to disseminate information, failing to incorporate elements unique to web communication, such as providing links to outside sources, proving multimedia materials and encouraging interactivity. These studies primarily utilize content analyses to describe the extent to which Web sites are currently incorporating practices that can be viewed as online versions of two-way, symmetrical communication.
To help organizations tap into the potential of the Internet in building relationships, Kent and Taylor (1998) advanced five principles for Web site development: creating a dialogic loop, providing useful information, generating return visits, providing an intuitive and easy-to-use interface, and making efforts to conserve visitors. Taylor, Kent, and White (2001) later argued that application of these five principles could greatly assist activist groups, who compete with many other like-minded groups to unite individuals in support of their cause, often operating on a tight budget, by providing a less expensive manner of developing a network of relationships. Though the authors’ assertion that nonprofit organizations usually operate on tight budgets is somewhat inaccurate, that study determined activist groups are not using their Web sites to build relationships.

Some research has investigated why creating and maintaining effective Web sites is a challenge for organizations. Hill and White (2000) held that public relations practitioners understand the importance of an effective Web site, but do not have the proper resources to maintain one. Ryan (2003) identified training and technical skills as significant issues. Finally, White and Raman (1991) found that public relations practitioners rarely conduct formal evaluation and research when creating a Web site, but rather rely on their intuition to create the site and then trial and error to improve it. The authors pointed out that practitioners also do not know if their Web sites are effective from the publics’ perspective.

Although technologies associated with social media could dramatically change many aspects of public relations, academics have largely neglected social media’s application to the practice of public relations (Pavlik, 2007; Wright & Hinson, 2008). Wright and Hinson (2008) noted that the public relations field expresses interest in social media through “the trade press, from reports written on behalf of some of the world’s largest public relations firms and from
practitioners who have written books and articles on the subject,” but “few academic articles about blogs or social media appear in the public relations scholarly literature” (p. 4).

Much scholarly research on social media has focused on blogs, online public diaries in which readers can respond to the author’s or blogger’s messages. Several researchers argued that, because blogs impact the media agenda, impact the public agenda and hold strong credibility with readers, they are an effective, fast and economical way of engaging key publics in two-way communication (Albrycht, 2004; Marken, 2005; Porter et al., 2007). Public relations practitioners should monitor blogs to identify emerging issues and engage them like traditional media outlets (Porter et al., 2007). Riva (2002) took a negative perspective arguing that computer mediated communication, including blogging and web chatting, take longer and omit important elements present in interpersonal communication, such as tone and facial expression.

Several authors explored blogs in terms of their potential for enacting ethical and effective public relations. Seltzer and Mitrook (2007) used Kent and Taylor’s (1998) five dialogic principles of building online organization-public relationships to examine the potential of Web logs for building online relationships, as compared to traditional Web sites. Seltzer and Mitrook (2007) found that, compared to traditional Web sites, Web logs incorporate the five dialogic principles to a much greater extent, “potentially making them better suited for online relationship-building” (p. 227). Similarly, Wright and Hinson (2008) argued that “the ability of blogs to facilitate two-way communication offers tremendous possibilities for the enactment of excellence theory” (p. 9). The authors noted that such organizations as Dell, IBM and Microsoft recognize the potential of blogs in sharing knowledge, promoting the organization’s products and services and engaging key publics in dialogue. IBM, for example, has registered nearly 15,000 employees to blog on behalf of the organization. The authors, however, noted that the integration
of blogging into communication strategies is not particularly prevalent, which demonstrates organizations’ reluctance to relinquish control over messaging.

Real examples best illustrate the challenge of managing relationships with stakeholders in a Web 2.0 environment. For example, NorthStar, a St. Paul, Minnesota based nonprofit lender with a student loan program called Total Higher Education, hosts a blog called the Ramen Report to help students understand the student loan industry and develop loan strategies (Total Higher Education, 2007). In 2007, the Ramen Report discussed pending legislation that it held would increase the price of loans for students, urging readers to take action against this legislation. Readers of the blog posted extremely negative responses, arguing that this legislation is actually good for students and that the Ramen Report only opposes it because it would harm the loan industry. An environment in which your constituents can immediately, and publicly, respond to your organization’s actions and messages seems to require new business practices and communication strategies.

In short, public relations scholarship addressing social media is gaining ground. What is primarily missing are works that build theory explaining the use of social media by practitioners. Existing work in this area will be presented in a later section.

Use and Implications of the Internet and Social Media in Fundraising

As in public relations, several practitioner sources have attempted to describe the use of social media in nonprofit management, including fundraising. In short, these studies have shown that charitable organizations are beginning to integrate social media into the communication, and fundraising, efforts.

In 2006, The Chronicle of Philanthropy began tracking the Philanthropy 400’s, a group of top-fundraising American charities, use of social media as part of its annual online giving study. The Chronicle (2009) reported this year that 41% of this elite group had experimented
with blogging, instant messaging and other technologies to raise money. Fifty-five % of reporting organizations had used Facebook, 21% had used MySpace and 20 % had used another social networking Web site. Eighteen percent reported having used the micro-blogging Web site Twitter.

A study conducted by the Nonprofit Technology Network (NTEN), Common Knowledge and The Port (2009) suggested that social media use among all nonprofit organizations may be slightly more prevalent than among the elite group, which is the Philanthropy 400. That study focused specifically on nonprofit organizations’ use of social networking Web sites such as Facebook or MySpace. The results reported were compiled based on 980 responses from nonprofit professionals working in all organization sizes and subsectors, though the report does not describe the sampling frame or sampling process. Eighty-six percent of that study’s respondents reported maintaining an organization profile on at least one commercial social network.

How and why are these organizations using social media? NTEN, Common Knowledge and The Port (2009) reported that 80% of respondents stated marketing was the main purpose of maintaining a page on a social networking site. In fact, these pages were most likely to be run by the organizations’ communications and marketing departments. That study also explored reasons organizations do, or do not, incorporate social media into their communication strategies, though the relationship between these reasons and actual usage of social media was not explored. Of the respondents who did not report an organizational presence on social networks, 44% said this was due to lack of in-house expertise in using these Web sites, 20% cited insufficient budget and 13% stated involvement in social media was a poor use of resources. That study, which used a nonscientific sampling technique, found that nonprofit organizations are beginning to
incorporate social media into their communications and that the majority of non-users think using social media would benefit fundraising.

**Academic Research on Social Media and Fundraising**

Moving to academic literature, some scholarly research has sought to explain how nonprofit organizations are using social media for fundraising. Work in this area, however, is still very limited.

Some scholars attempted to describe how organizations are using social media. Seo, Kim and Yang (2009), surveyed communication representatives from non-governmental organizations (NGOs) based in the United States and stated that promoting the organization’s image and fundraising were the two most-reported uses of social media. One study applied practitioner literature to describe how organizations might effectively use social media, then evaluated organizations accordingly. Waters, Burnett, Lamm and Lucas (2009), based on an extensive literature review, theorized that nonprofit organizations could use profiles on Facebook to enhance disclosure, disseminate information and involve target publics in the organization. The authors content analyzed the profiles of a random sample of organizations with a presence on Facebook to assess how effectively they enacted each strategy. In short, that study concluded that most organizations effectively used their Facebook profiles to enhance disclosure, by listing the administrator of their profiles (97%) and by providing an organization description (96%), but that organizations did not take full advantage of Facebook’s potential for disseminating information or generating involvement with the organization.

Related to involvement, Waters et al. (2009) reported that most organizations (71%) provided email addresses for organizational representatives, but few maximized their profiles’ potential for generating involvement by using message boards (44%), providing an outlet to make charitable donations (13%), listing current volunteer opportunities (13%), providing an
organizational phone number (9%), providing a calendar of events (8%) and providing an e-commerce store on their profile (1%). Related to message dissemination, organizations most frequently utilized photographs, discussion board topics, announcements, videos and audio files. The authors asserted, however, that organizations could further enhance disclosure by providing a link to their Web site from their Facebook profile, including an organization logo, providing the mission statement and including an organization history.

In short, nonprofit management and fundraising scholarship addressing social media has been extremely limited, despite interest within the practitioner community. As in the public relations literature, scholars have not truly moved past describing and prescribing to build theory explaining the use of social media by practitioners. The next section will address the few studies that have attempted to do so.

**Explaining Public Relations and Fundraising Practitioners’ Use of Social Media**

As previously discussed, much academic research exploring the phenomenon of practitioners’ use of social media has been descriptive and prescriptive, describing how practitioners are currently using social media and presenting arguments as to how practitioners should be using social media. Very little research has sought to explain why public relations and fundraising practitioners use social media in their work (i.e., what variables predict social media use). After reviewing the existing research addressing this topic, this section discusses the TRA and its variant the TAM, two theories which have been fruitfully applied to research in professional communications, particularly in the areas of marketing and advertising. These theories could be instructive in explaining fundraisers’ use of social media in their work.

This section first turns its attention to work that has attempted to answer the fundamental question of why practitioners are using social media in their work. Many of the public relations practitioner benchmark studies previously reviewed suggest that the key to understanding
practitioner use of social media may be in individuals’ perceptions of social media. These studies explored practitioners’ knowledge of, attitudes toward and use of social media, though the relationship between these concepts was not explored. Although these studies shed light on potential variables that may predict practitioner social media use, they do not work to build theories of social media use. For example, Goodman’s (2006) practitioner report detailing the findings of the Makovsky 2006 State of Corporate Blogging Survey, which polled executives of Fortune 1000 companies, emphasized that respondents were generally unfamiliar with blogs and largely did not agree blogs were useful as online promotional tools. These perceptions seem to have impacted organizational behavior, as only 15% of respondents reported their organizations maintained a blog about their activities.

Similarly, Gillen’s (2008) summary of the findings of the New Influencers study suggests a correlation between perceptions of how useful a social media type was in accomplishing communication goals and frequency of using that type of social media, though that study did not actually study this relationship. The Wright and Hinson (2008) study described previously, which surveyed public relations practitioners, found that practitioners generally viewed social media as enhancing the practice of public relations and useful for building relationships with key publics. Moreover, practitioners agreed public relations professionals should monitor blog content about their organizations. Ninety-six percent of respondents reported spending time working with blogs on the job. In short, these studies suggest that perceptions of social media do impact on-the-job behavior, but these studies did not explore the relationship between perceptions and behavior.

A study by Eyrich, Padman and Sweetser (2008) surveyed public relations practitioners about their use of 18 social media tools. That study did establish a connection between
practitioners’ perceptions of social media and their actual use of social media. Particularly, that study was interested in exploring the potential relationship between practitioners’ personal adoption of social media tools on the job and their perceived adoption of these tools in the industry. That study found a weak positive correlation between these two variables ($r=.217$), providing some evidence that practitioners’ perceptions about social media affect their use of social media.

**Theorizing the Relationship between Cognitive Activity and Behavior**

A wealth of theory exists that explains individuals’ behavior based on their cognitive activity. Two popular examples include the TRA (Ajzen & Fishbein, 1973; Fishbein, 1967; Fishbein & Ajzen, 1975) and the Theory of Planned Behavior (TPB) (Ajzen, 1985, 1991). Both theories have been applied to the study of professional communication, most frequently to predict the behavior of target publics, including consumers.

The TRA, in particular, has been widely applied to the study of professional communication. Social psychologist Fishbein (1967; Ajzen & Fishbein, 1973; Fishbein & Ajzen, 1975) posited that an individual’s behavior is driven by behavioral intention, which is determined by two variables: attitude toward the act or behavior in question and subjective norm. Attitude toward an act or behavior is defined as the positive and negative feelings one has about performing the behavior and is determined through a process by which individuals assess the desirability of what they believe to be the possible outcomes of performing the behavior. Subjective norm is an individual’s perception of whether influential persons think the behavior should be performed, and is weighted based on the individual’s motivation to comply with these influentials’ perceived opinions. A major criticism of this model is its assumption that once an individual intends to perform an action, they will be free to act. Ajzen (1985, 1991) later
presented the TPB to account for limitations such as ability, time, environment, individual habits and organizational variables.

**Applications of the Theory of Reasoned Action (TRA) to Professional Communication**

Despite critiques, the TRA has been applied in explaining target publics’, including consumers’, reactions to organizational actions and communications. For example, public relations scholar Lee (2005) integrated the TRA into the path model she developed to explain how key publics would evaluate an organization in times of crisis. The data from the experiment the author conducted fit well with the model, suggesting the TRA can be used to explain how publics react in times of crisis.

Davis (1986, 1989) adapted the TRA to the field of information systems (IS) research, which explores individuals’ use of technology, and presented the TAM. Like the TRA, TAM posits that individual behavior, in this case use of a specific information system, is a result of individual behavior intention to use the information system. Behavioral intention is a function of both the individual’s perceived usefulness and perceived ease of use for the technology in question. The former is seen as being directly impacted by the latter.

The TAM has also proven to be extremely provocative to scientists. The most popular application of this theory has been for predicting consumer reactions to advertising and marketing strategies involving new technology. The theory has been used to explain consumer acceptance of online and mobile auctions (Stern, Royne, Stafford & Bienstock; Wang & Barnes, 2009), mobile commerce (Lee & Jun, 2007; Yang, 2005), mobile payment (Chen, 2008), automotive telematics (Chen & Chen, 2009), multimedia messaging services (Hsu, Lu & Hsu, 2008), mobile data services (Karaiskos, Bina & Giaglis, 2008) and making purchases in virtual environments (Cha, 2008; Chung, 2005a, 2005b). This type of applied research utilizes the theory to prescribe effective behavior on the part of communication professionals.
Less frequently, these theories have been used to predict the behavior of professional communicators. Sweetser, Avery, Lariscy and Howe (2009) applied the Unified Theory of Acceptance and Use of Technology (UTAUT) to explain public relations practitioners’ adoption of social media. Venkatesh et al. (2003) originally presented UTAUT by synthesizing eight earlier models that sought to explain individuals’ use of technology. These models included the TRA, TAM and Innovation Diffusion Theory. The dependent constructs of UTAUT are behavioral intention to use a technology and use of the technology. The independent constructs are performance expectancy, effort expectancy, social influence, facilitating conditions, gender, age, experience and voluntariness of use.

Much like TAM’s perceived usefulness construct, performance expectancy evaluates the extent to which the individual believes using the technology will lead to quick accomplishments and increased productivity. The facilitating conditions construct evaluates whether the individual has the resources necessary to implement the technology. Similar to TAM’s perceived ease of use construct, UTAUT’s facilitating conditions construct also evaluates the extent to which the individual believes they have the knowledge and skills to implement the technology. The anxiety construct evaluates the extent to which the individual believes relevant peer groups use the new technology. Finally, the social influence construct evaluates the extent to which the individual believes relevant influential groups support use of the new technology.

In that UTAUT attempts to synthesize eight earlier models used to predict individuals’ use of technology, this model for predicting behavior is less parsimonious than either the TRA or TAB. Though UTAUT was originally intended to measure behavior at the individual level of analysis, Sweetser et al. (2009) used the theory to measure adoption at the organizational level: thus the authors eliminated items used to measure the main four independent constructs—
performance expectancy, effort expectancy, social influence and facilitating conditions—which they believed were specific to individuals and could not be applied to measure at the organizational level. That study found the four constructs did predict adoption of social media by Fortune 500 companies, though only social influence contributed significantly to the prediction. That study, however, does not help validate UTAUT, as a whole, for application to individual public relations practitioners’ acceptance of new technology.

Next, this study turns its attention to roles theory, a theory of public relations practitioner behavior that, combined with TAM, might help explain how and why public relations and fundraising practitioners use social media.

**Roles Theory in Public Relations and Fundraising Research**

Katz and Kahn (1978) defined a role as “the set of recurring actions of an individual, appropriately interrelated with the repetitive actions of others so as to yield a predictable outcome” (p. 189). An individual’s role is determined by the actions performed *most repetitively* in one’s daily work. Role does not describe or prescribe all of the actions an individual ever performs on the job, only the actions performed most frequently. Although an individual may perform other actions, and roles, to a lesser degree, dominant role can be identified based on observed or reported behavior.

Of note in the above definition is the concept of *relationships*, which reflects role theory’s roots in organizational literature. Though measured at the individual level, roles are also a way of understanding groups and organizations. Following the theory’s early authors, Katz and Kahn (1978) argued that formal organizations are best understood as systems of individuals performing roles.

Katz and Kahn (1978) distinguished role from *office*, the physical place an individual occupies in the organization (e.g., corporate executive officer), which involves specific
relationships to other offices in the organization and to the organization as a whole. Importantly, office involves an expected behavior set of the occupant. One’s dominant role, because it is determined based on actual behavior, may not correspond to the behavior set expected of that office. Other key concepts of roles theory include role sending, the process by which relevant officeholders communicate the behavior sets expected of subordinate officeholders, and role expectations, the complete behavior set expected of an office holder.

Drawing on Katz and Kahn’s (1978) theory, Broom and Smith (1978) reviewed literature from public relations, organizational theory and development and consulting to conceptualize a set of roles enacted by public relations practitioners. The authors conceived of public relations practitioners as consultants to the dominant coalition, or organizational elites, and their set of roles expressed the specific types of assistance practitioners provided. Omitting the one role eliminated during later pretesting, the author theorized that public relations practitioners enact four roles: expert prescriber, in which public practitioners are considered public relations experts and the dominant coalition complies with their recommendations, communication facilitator, in which practitioners act as liaisons between the dominant coalition and key publics, problem-solving process facilitator, in which practitioners assist the dominant coalition in analyzing and solving public relations problems and communication technician, in which practitioners produce and disseminate communication materials.

Broom (1982) later operationalized his theoretical roles by developing a set of 24 behavioral items, six to measure a practitioner’s enactment of each of the four roles. In the author’s national survey of Public Relations Society of America (PRSA) members, the items were presented as statements describing aspects of what public relations practitioners do on the job, and respondents were asked to use a 7-point scale (where 1=never and 7=always) to report
how frequently they performed each activity in their work. Based on comparing mean scores for each role, the role predominantly enacted by that practitioner could be identified. In short, that study validated the author’s roles as originally conceptualized (i.e., demonstrated they do explain the behavior of public relations practitioners and demonstrated his roles measures were reliable). The four public relations roles, therefore, represent a positive theory of public relations, one which explains how public relations is, not necessarily how it should be practiced.

Broom’s (1982) survey of Public Relations Society of America (PRSA) members revealed practitioners tend to enact the expert prescriber, communication facilitator and problem-solving process facilitator roles simultaneously, but these roles did not correlate with the communication technician role. Based on this finding, Dozier (1992) later advocated the four original roles be collapsed into the manager-technician dichotomy. The new communication manager role incorporated elements of the three highly-correlated roles, while the communication technician role remained as originally operationalized. Again, a practitioner was classified as predominantly a manager or technician based on comparing mean scores on the items representing the manager and technician roles.

As previously discussed, fundraising is considered the specialty of public relations that focuses on building and maintaining relationships between nonprofit organizations and their donor publics (Broom, 2009; Hall, 2002; Kelly, 1991, 1998a). Based on these arguments, Kelly (1998a) applied Broom’s (1982) four public relations roles to explain the behavior of fundraising practitioners. As in public relations roles research, the author hypothesized that practitioners play all four roles to some extent, but that a predominant role could be identified. The author’s extensive review of practitioner literature confirmed all four roles exist in fundraising practice.
Although the communication facilitator role was renamed *liaison* and the communication technician role was renamed *technician* out of concern that “the term ‘communication’ may hamper understanding by some future practitioners,” Kelly’s (1998a) roles follow Broom’s (1982) original theoretical definitions (p. 194).

In the *liaison* role, fundraisers act as “facilitators, interpreters, and mediators in bringing together organizational representatives with perspective donors” (Kelly, 1998a, p. 194). As liaisons, fundraisers are essentially consultants, who do not actually solicit gifts but counsel organizational representatives on doing so. In the *expert prescriber role*, fundraising exists in a silo. Practitioners plan and execute fundraising programs without involvement from upper management. As *problem-solving process facilitators*, fundraisers act as both consultants and managers, collaborating with management to guide the organization through the fundraising process. In the *technician* role, fundraisers are not involved in strategic planning, but implement the programs designed by management and produce techniques required for these programs.

Like Broom (1982), Kelly conducted research to validate these roles, or verify that they explain the behavior of fundraising practitioners. Kelly (1998b) conducted in-depth interviews with 13 fundraising professionals in Louisiana. Though using a small sample, the exploratory study confirmed that the four fundraising roles do describe the behavior of fundraising practitioners working in different types of charitable organizations. Waters, Kelly and Walker (2008) later conducted a national survey of members of the Association of Healthcare Philanthropy (AHP), which further confirmed the four roles accounted for the behavior of fundraising practitioners. That study also supported Kelly’s (1998a) hypothesis that, as in public relations research, the four fundraising roles could be collapsed into a two-role dichotomy because the liaison, expert prescriber and problem-solving process facilitator roles were related
by an underlying managerial dimension, while the technician role was non-managerial. Waters, Kelly and Walker’s (2008) correlation analysis found that the liaison, problem-solving process facilitator and expert prescriber roles were intercorrelated with each other, but not with the technician role. The manager-technician dichotomy, therefore, may be more efficient for future research.

Waters, Kelly and Walker (2008) also found that fundraisers predominantly enact the expert prescriber role, which is problematic in that fundraisers in this role operate in a silo and senior management is not involved in fundraising’s strategic planning. Kelly (1998a) had hypothesized that the problem-solving process facilitator role was superior to the other two managerial roles in that the former dictates fundraising consults and collaborates with management to determine the direction fundraising will take, which results in fundraising programming that more effectively contributes to organizational effectiveness.

Roles research has been criticized, and a great deal of this criticism has been methodological. Though many critics accept the basic assumption of roles research that it is worthwhile to develop a set of roles representing the range of activities performed by public relations practitioners and items to measure role enactment, authors have pointed out deficiencies in Broom and Smith’s (1978) and Broom’s (1982) items to measure role enactment. Several authors, following either inductive or deductive processes, developed alternative sets of items to represent public relations work (Berkowitz & Hristodoulakis, 1999; Ferguson, 1979; Guth, 1995; Leichty & Springston, 1996; Toth, Serini, Wright & Emig, 1998). Wright (1995), based on his observation of senior level communication executives, argued that the manager role was more complex than originally operationalized and suggested a third role, the communication executive, be added to represent practitioners who report directly to CEOs.
Similarly, a stream of work initiated by DeSanto (DeSanto & Moss, 2004; Moss, Newman & DeSanto, 2005) criticized the original conception of the manager role for ignoring a large body of general management theory, which the author argued can help explain the behavior of public relations managers. Importantly, general management literature suggests managers’ work varies by function, level and organizational context, thus a broader conception of the work of public relations managers is needed. Based on qualitative study of the work patterns of communication and public relations managers in the U.S. and U.K. (DeSanto & Moss, 2004), as well as surveys of senior communicators and public relations professionals in the U.K. (Moss, Newman & DeSanto, 2005), the authors presented a new five-dimensional model of public relations work. The managerial dimensions were monitor and evaluator, key policy and strategy advisor, trouble shooter/problem solver and issue management expert, while the technical element was represented by the communication technician dimension. DeSanto, Moss and Newman (2007) later validated this model among U.S. public relations practitioners.

Dozier and Broom (2006) acknowledged that the four roles do simplify the myriad activities public relations professionals perform on the job. Similarly, determining a predominant role necessarily ignores some activities individuals perform because practitioners enact aspects of all four roles. The conceptualization becomes even further simplified when practitioners are classified as manager or technician. The theory, they explain, was never intended to present an exhaustive description of all activities performed by practitioners, but rather to provide partial explanations that can be applied across the wide variety of organizational settings in which public relations practitioners work. This enables researchers to measure predominant role enacted, which can then be used as a concept to fit into public relations theories. Dozier and Broom (2006) argued that continuing to develop different sets of
roles and items to measure them had little value since this made it impossible to compare findings from this whole body of research.

A review of public relations literature reveals that both Broom and Smith’s (1978) four original roles and Dozier’s (1992) manager-technician dichotomy have inspired a great deal of public relations research. As discussed above, some of the criticism has emanated from methodologists, but some researchers challenge roles theory on ideological grounds. DeSanto, Moss and Newman (2007) noted feminist scholars have emphasized how roles researchers fail to emphasize “how the gender of researchers and practitioners being studied may influence the type of research questions posed and the assumptions being made” (p. 440). Moreover, feminists argued that the manager-technician dichotomy trivializes the importance of the technician role, which is mainly enacted by female practitioners, while also failing to acknowledge that female practitioners designated as technicians do perform managerial tasks to some degree (Creedon, 1991; Toth & L. Grunig, 1993). Dozier and Broom (2006) argued that an important contribution of roles research was that, once roles studies revealed female practitioners largely enact the technician role, the theory inspired public relations research which brought attention to issues of gender equality.

Moreover, roles research—as the authors argued it could—has resulted in the construction of a fairly detailed theoretical model to describe the antecedents and consequences of role enactment. Dozier and Broom (1995) identified gender, tenure with current employer, professional experience, role expertise, education and operations research expertise as antecedents to role enactment and income, job satisfaction and participation in strategic decision-making as consequences. A particularly valuable vein of theory has been the feminist critiques of
roles theory, which has helped to analyze the place of women in public relations and to generate debate about gender equality in public relations.

In contrast to the above studies, the Excellence Study, which focused on describing public relations departments most likely to contribute to organizational excellence, applied role theory at both the individual and organizational levels of analysis. L. A. Grunig, J. E. Grunig and Dozier (2002) reasoned that because the manager role involves such a wide range of competencies, which one individual may not embody, these competencies were more appropriately measured separately to ensure they exist within the department as a whole. Thus, the study measured role at both the individual level, by determining predominant role of the top communicator, and at the department level.

In short, L. Grunig, et al. (2002) reported that excellent public relations departments have senior communicators in the managerial role and possess, as a department, the expertise to enact the managerial role. While technical expertise in the absence of managerial expertise is not valuable, the most effective managers also possess technical expertise or have it available to them in their departments. In relation to the views of CEOs, the Excellence Study found that those with excellent public relations departments expect their public relations employees to enact the manager role. Dozier and Broom (2006) argued that although findings from the Excellence Study can be used to begin constructing a theoretical model of role enactment at the organizational level, not much research has occurred on this level and more research was needed in this area.

**Practitioner Role and Use and Perceptions of New Technology**

From the late 1980s, public relations practitioners argued that new technology represented an opportunity to enhance the profession and called for increased adoption.
Practitioners discussed new technology’s potential to enhance both the managerial and technical aspects of public relations.

In a report published by the present-day Institute for Public Relations, Fiur (1986) argued that technology then considered new, such as e-mail, audio and video, enhanced practitioners’ creation and dissemination of messages, the primary task of the *communication technician* role as conceptualized by Broom (1982). Other practitioners argued that newsletters and brochures could be created more economically and efficiently with desktop publishing software (Janal, 1991), that databases and software could assist in maintaining media lists (Fisher, 1991) and that video new releases were an effective alternative for distributing messages typically included in written press releases (Swonger, 1991).

Turning to the managerial aspect of public relations, Fiur (1986) argued that new technology presented an important opportunity for practitioners to contribute to organizations’ strategic planning, an important component of the *communication manager* role as conceptualized by Dozier (1992). Computer programs and databases, Fiur (1986) argued, provided unprecedented access to information and communication, which enhanced practitioners’ ability to track issues and analyze changes in the business environment, helping organizations anticipate and respond to issues. Fisher (1991) described how, using project management software, public relations managers can more effectively plan, monitor and adjust public relations programs, particularly by tracking the resources involved in those programs. Levitt (1991) discussed how budgeting software and spreadsheets could enhance budgeting and accounting.

The practitioner authors previously discussed argued new technology essentially enhances what public relations practitioners already do, a perspective echoed by Dozier (1989).
In short, the author stated that new technology focusing on disseminating messages is useful to technicians and technology that can be used to solve strategic problems is useful to managers. Focusing on technologies considered new at the time of his writing, the author argued that desktop publishing and e-mail distribution lists were examples of the former while statistical software packages, which enhance practitioners’ ability to scan their environment and identify public relations problems and opportunities, were examples of the latter. Though these technologies are no longer considered “new,” Dozier’s (1989) point is clear: Technologies should be evaluated in terms of how they enhance a practitioner’s dominant role. Years later, Pavlik’s (2007) discussion of new technology echoes Dozier’s (1989) point. The author notes that Web 1.0 technologies, such as organizational Web sites, simply provide better ways to distribute content that organizations are already delivering to key publics. For example, materials previously distributed via brochures or annual reports might instead be housed on the organization’s Web site. These technologies, therefore, are useful to technicians.

**Academic Research on the Relationship between Dominant Role and New Technology**

L. Grunig, et al. (2002) argued that “role enactment offers a useful framework for thinking about communication and technology” (p. 216). A handful of scholarly studies have explored how role predominantly enacted relates to practitioners’ use of technology and perceptions of technology. In short, these studies found that managers and technicians do use technology differently and have different perceptions of new technology.

Anderson and Reagan (1992) found that, when provided with the same 40 technological capabilities, use of technology does vary between managers and technicians. As the conceptual definitions of manager and technician would predict, this study found the use of graphics software and desktop publishing were significantly related to the technician ($r=.36$, $r=.30$, respectively), but not the manager, role. Scores on the public relations manager role index were
significantly and positively correlated with use of fax, accounting software, communications
software, teleconferencing and computerized appointment calendar (r=.21, r=.27, r=.27, r=.52
and r=.34, respectively). Scores on the communications technician role index were also
significantly and positively correlated with use of communications software and teleconferencing
(r=.42, r=.29, respectively), but technicians used communications software more frequently than
managers and used teleconferencing less.

Similarly, Kelleher (2001) used media richness theory to explain the channels managers
and technicians would use to communicate. This theory classifies communication channels as
high or low in richness based on the potential for quick feedback, personal focus, multiple
communication cues and language variety. According to this theory, oral communication is
generally considered higher in richness than written communication. Faced with a specific task,
practitioners select the media channel they perceive will be most efficient for accomplishing that
task. Based on role theory, the author hypothesized that managers spent more time
communicating via high richness channels, such as interpersonal conversation and telephone
calls, while technicians spent more time communicating via lean media channels, such as e-mail
and physical mail. These hypotheses were supported.

The findings of the two studies just discussed show that managers and practitioners do
use technology differently. Anderson and Reagan (1992) also compared managers’ and
technicians’ perceptions of new technology. Their study asked respondents to report on the
extent to which they believed new technology increased productivity in accomplishing certain
tasks and job functions. Perceptions were correlated with practitioner scores on the predominant
role. Scores on the public relations manager index were significantly and positively correlated
with using databases, accounting, searching market data, searching demographic data, public
affairs policy planning, media monitoring, issues management, new product launches, developing communication goals and budgeting or tracking expenses ($r=0.14, r=0.27, r=0.32, r=0.31, r=0.22, r=0.22, r=0.17, r=0.22, r=0.22$ and $r=0.21$, respectively). Scores on the technician index were significantly and positively correlated with new product launches, developing communication goals and finding new clients ($r=0.22, r=0.19$ and $r=0.18$, respectively). In short, managers and technicians do perceive technology differently. They view them as enabling tasks relevant to their predominant role.

Johnson (1997) conducted in-depth interviews with 17 public relations practitioners. She reported that although practitioners viewed the Internet as a new medium for disseminating messages to a mass audience, the informants also felt the interactive nature of the Internet was valuable for enhancing two-way communication between an organization and its key publics. A particularly interesting conclusion drawn by this study is that new technology requires rethinking of the traditional conceptual definitions of manager and technician. For example, creative activities of technicians may have historically been separate from such managerial activities as evaluation and environmental scanning. New technology, however, often means that feedback from publics is built directly into tactics, as in the feedback portion of organizational Web sites. New technology, therefore, has the potential to drive more technicians toward enacting the manager role and to blur the boundaries between these two roles. This suggests that public relations and fundraising technicians who use social media in their work will enact the manager role to a greater extent than those technicians who do not use social media in their work.

**Social Media and the Fundraising Process**

The fundraising literature argues that effective fundraising does not operate in a haphazard manner, but follows a strategic management process. Seiler (2003) cautioned that “effective fundraising depends on effective planning and rigorous execution—actually, more
planning than execution. The better the planning, the better the fundraising results” (p. 23). In the literature, there is agreement as to the basic steps that should be involved in the fundraising process. Kelly’s (1998a) ROPES process of fundraising synthesized the processes of several fundraising practitioners as well as incorporated public relations literature to reflect her view of fundraising as building relationships between an organization and its donor publics. In the section that follows, I will describe how social media can be applied to points in the fundraising process, supporting this description with relevant practitioner literature.

It should be noted that this discussion does not address the application of social media to the objectives and evaluation steps of the fundraising process. This is because objective setting involves planning, which occurs within the fundraising department itself, ideally in conjunction with organization leadership, based upon information gathered during the research phase of the fundraising process (Kelly, 1998a). Therefore, the use of social media in the research step of the fundraising process may inform the setting of objectives to guide fundraising programming, but social media would not actually be used to set objectives.

At the evaluation step of the fundraising process, practitioners again conduct research to determine whether a fundraising program’s objectives were met. Evaluation may also occur during a program to check progress towards objectives and in pre-production, such as to evaluate the potential effectiveness of communication techniques (Kelly, 1998a). The author places fundraising research methods on a continuum ranging from unscientific to scientific. At one end of the continuum are informal, unscientific methods such as conversations with members of relevant key publics. Closer to formal, scientific methods are qualitative research methods such as focus groups and in-depth interviews. The author classifies surveys, experiments, content analysis and statistical analysis as formal and scientific.
Ideally, scientific research methods such as surveys involve drawing a random sample of participants from a complete sampling frame, or list, of the donor public that a fundraising program targets. When random sampling is used, the fundraiser may ultimately generate findings that accurately describe the entire donor public of interest. On the other hand, when fundraisers do not use random sampling, they may only describe the views of the individuals from whom data was actually collected. Although Kelly (1998) does not argue that formal, scientific methods using random sampling are the most effective form of fundraising evaluation, only these methods allow fundraisers to describe how their programs impact the knowledge, attitudes and behaviors of a program’s entire target public. These methods, therefore, are most effective for fundraising evaluation.

Social media will not play into the development of ways to evaluate program objectives (e.g., research instruments such as surveys) and the statistical analysis of the data collected, which will occur within the fundraising department, itself. Although research itself could feasibly be carried out using social media, practitioners are cautioned to remember that the publics reachable on social media do not necessarily represent the entire donor public of interest, thus compromising the sampling for the research method and the accuracy of the research results.

**Research**

Several practitioners and scholars agreed successful fundraising begins with research (Fogal, 2005; Kelly, 1998a; Seiler, 2003). Research is the first step of Kelly’s (1998) ROPES fundraising process, and the author argues it is the most important. Without research, she argues, practitioners cannot formulate effective strategies and ensure their programs achieve the desired results.

Fogal (2005), Kelly (1998a) and Seiler (2003) all emphasize that conducting research on the organization’s key publics is essential to successful fundraising. Kelly (1998a) presented the
two-way symmetrical model of fundraising as the most ethical and effective. Enacting this model, fundraisers seek to build long-term relationships with key publics, by balancing the needs of target publics with those of the organization. This requires that fundraisers learn about the interests and needs of key publics. Similarly, Seiler (2003) argues that practitioners must learn about the wants, interests and needs of key publics, then consider how these could be met through involvement with the organization. The author asserts that an organization’s case for support should be compared to donors’ desires to ensure market validation. Fogal (2005) notes practitioners should secure the contact information of target publics and consider how receptive these groups have been to past solicitations.

Because social media provide forums in which individuals publicly air their views about organizations and issues and engage others in dialogue about these topics, fundraisers can use social media to research public opinion of their organization and its cause. Gillen’s (2008) report of the Society for New Communication Research’s *New Influencers* study demonstrated that some organizations are using social media in this way. The American Red Cross, for example, has an online relationship manager on staff, whose role is to identify and monitor conversations about the Red Cross and issues related to its work, in order to learn public opinion. Seiler (2003) and Kelly (1998a) also note fundraisers should conduct research on the organization itself. For Kelly (1998a), an important component of organizational research is conducting a SWOT analysis, an audit of the organization’s internal strengths (S) and weaknesses (W) and external opportunities (O) and threats (T). While social media do not provide an appropriate forum for conducting some of this research, it is an effective means of tracking the organization’s competitors. Only Kelly (1998a) asserts practitioners should conduct research on the specific
fundraising opportunity at hand, including the organization’s and key public’s views about the opportunity. The latter can potentially be accomplished by monitoring social media.

**Programming**

Following the research phase of the fundraising process, practitioners should engage in setting goals and objectives to guide their programs. These express the desired end result of the program and generally address desired cognitions or actions on the part of the organization’s target publics. For example, organizations may seek to raise a certain amount of money or to improve public opinion of their organization by a certain degree.

The essential and visible element of programming is the communications technique that delivers the organization’s message to the target public. Kelly (1998a) distinguishes between cultivation and solicitation messages, the prior involve preparing the target public to be asked for a gift and work to build a relationship, and the latter involve asking for a charitable gift. Similarly, Rosso (1999) noted that fundraisers should spend 80% of their time preparing key publics for “the ask” and 20% of their time making “the ask.”

For quite some time, the nonprofit sector has recognized the potential of the Internet for fundraising. In fact, the term e-philanthropy has emerged to refer to fundraising conducted online. Like Kelly (1998a), authors discussing e-philanthropy emphasized the importance of including both cultivation and solicitation. Hart (2003), former president of the e-Philanthropy Foundation, emphasized that successful e-philanthropy entails using the Internet first to build relationships with supporters through communication, then as a solicitation tool. Gillen’s (2008) discussion of the Red Cross’s online relationship manager shows that organization is using social media for cultivation by engaging donors and potential donors in dialogue about the organization and its cause, whether to address concerns and correct misconceptions or to simply provide further information about the organization and its cause.
The Chronicle of Philanthropy’s (2008) online giving study, an annual survey of the Philanthropy 400, a group of American charitable organizations raising the most money from private sources, has identified continuous growth in the amounts of money these organizations raise online. Moreover, the three most recent studies demonstrated organizations are integrating new technologies such as MySpace, Facebook, Twitter, other social networking sites, blogging and instant messaging into their online fundraising efforts.

For Kelly (1998a), an important part of programming is selecting the appropriate vehicle for a fundraising message, which she refers to as a technique or tactic. The author’s hierarchy of fundraising techniques classifies techniques as mass media (uncontrolled) communication, controlled media communication, and interpersonal communication. Importantly, these categories range from least effective to most effective. Like Kelly (1998a), White and Raman (1991) acknowledged that public relations tactics such as newsletters and annual reports, in which practitioners can completely control message content, are different from tactics like press releases, which are subject to the gate keeping effects of journalists and editors.

Specific techniques included in Kelly’s (1998a) controlled media communication category include direct mail; special events; publications such as newsletters, brochures and flyers; phonathons; videos and films; computers, telethons on television or radio; and paid advertisements, including billboards and collection signage (p. 375). Specific techniques for the mass media (uncontrolled) communication category include editorials, op-ed pieces, news releases, story placements, and public service announcements (p. 375). The author’s typology of tactics includes a third category, interpersonal communication that the author defines as “direct communication between people” (p. 375). This category includes face-to-face conversations, small group meetings, speeches, telephone conversations, personal letters, and personalized
proposals. A flaw of Kelly’s (1998a) typology is that telephone conversations, personal letters, and personalized proposals are not classified as mediated, even though they involve a channel for message delivery.

In the practitioner realm, Rosso (1991, reprinted in Tempel, 2003) created the *ladder of effectiveness*, to explain the relative effectiveness of different methods of gift solicitation. In descending order, the ladder’s rungs include: personal or face-to-face communication; personal letters on personalized stationary; personalized letters delivered via Internet; telephone solicitations and phonathons; impersonal letters, direct mail or e-mails; impersonal telephone calls and telemarketing; fundraising benefits and special events; door-to-door solicitation; and media, advertising and the Internet. Though the author never describes why, he asserts the most effective gift solicitation consists of a face-to-face meeting and that communicating through the media, with advertising space, air time, newspaper articles and feature stories, is expensive and least effective in generating gifts. The latter should be used to publicize the organization (Rosso, 1991). Hodge (2003) also noted that the most effective solicitation involves intimate meetings with donors, a form of interpersonal communication.

Kelly (1998a) placed communication techniques involving computers within controlled media communication. At the time of Kelly’s writing, this conceptualization was consistent with how organizations typically used the Internet, in a Web 1.0 fashion. In the modern environment of the Internet, however, public relations and fundraising practitioners can no longer control Internet content as they could in the past, such as through a controlled organizational Web site. Web 2.0 allows an entirely different range and actions on the part of users, which alter how public relations practitioners must operate.
Stewardship

After a fundraising program has concluded, and its effectiveness has been evaluated, scholars and practitioners emphasize organizations should make efforts to maintain contact with donors (Kelly, 1998a; Sargeant, 2001, 2008).

Kelly (1998a), who views the fundraising process as a means of building relationships between an organization and its donor publics, argues that fundraisers should view this process as cyclical, as opposed to linear. The final phase of every fundraising program, therefore, is engaging in stewardship, which works to maintain relationships built with donor publics during fundraising programs until the next program directed toward these groups begins. An important component of stewardship is relationship-nurturing, in which fundraisers work to keep donor publics close to the organization. Similarly, Sargeant’s (2001, 2008) concept of relationship fundraising, which borrows from the for-profit practice of relationship marketing, emphasizes that it is far less expensive to retain existing donors than to continuously recruit new donors. Thus, organizations must work to maintain donors’ loyalty to the organization, which can prevent donor lapse.

Several authors more explicitly addressed how organizations should engage in stewardship. Many authors argued thanking donors for their charitable gifts is essential (Conway, 2003; Fischer, 2000; Hodge, 2003; Kelly, 1998a). Kelly (1998a) calls this component of stewardship reciprocity, which she defines as the organization expressing gratitude for donor publics’ supportive behavior. Fischer (2000) defines stewardship as “programs for showing appreciation to donors and giving donors various forms of recognition for gifts” (p. 130).

Conway (2003) and Hodge (2003) addressed the appropriate way to thank donors. Conway (2003) cautioned against impersonal expressions of thanks that leave donors feeling empty. Similarly, Hodge (2003) noted, for major gift donors, “recognition should be as personal
as possible, reflective of the uniqueness of the nonprofit and the gift and appropriate to the size and importance of the contribution” (p. 99). Examples include reports on construction progress, thank-you letters from scholarship recipients, and financial reports. The author held that, once a major donor has committed to a gift, stewardship must begin immediately to encourage future gifts.

Most practitioner authors discuss stewardship as more than simply thanking donors, and as a value permeating the nonprofit sector. Conway (2003) defines stewardship as “being responsible for something valuable on behalf of someone who has entrusted it to our care” (p. 432). This definition reminds us that charitable organizations exist not for their purposes, but to serve charitable purposes. Gifts given to address charitable purposes, therefore, are not a charitable organization’s property, but are held in trust. Fischer (2000) reminded that nonprofit organizations’ main function is as “conduits through which donors address societal problems” (p. 134). Rosso (1991) argued that this value must permeate the nonprofit sector and guide every decision made by a charitable organization’s leadership, from selecting the mission and objectives to developing policies, procedures and programs. Importantly, the author asserted that ethical fundraising must be based on an organization’s existing commitment to good stewardship, which fundraisers simply reflect.

The most important way organizations thank donors, therefore, is by communicating how charitable gifts have been used effectively and honestly to further the organization’s mission. Several authors argued that, beyond simply thanking donors for their gifts, organizations must work to demonstrate that they are worthy of donor publics’ support and that they use charitable gifts appropriately (Fischer, 2000; Grace, 1997; Kelly, 1998a). This is communicated through Kelly’s (1998a) stewardship elements of responsibility and reporting. The former is defined as
acting socially responsible toward supportive publics, while the latter is defined as demonstrating accountability. Like Kelly (1998a), Grace (1997) emphasizes organizations have a responsibility to use charitable gifts wisely and to demonstrate accountability.

Hart (2003) asserted stewardship can effectively be carried out in an electronic environment. Waters (2007a) explained how the Internet and social media could be used to carry out Kelly’s (1998a) four elements of stewardship: reciprocity, responsibility, reporting and relationship nurturing. Waters (2007a) noted that e-mail is an effective and inexpensive way to thank donors, volunteers, and special event attendees for their contributions. Blogs and social networking sites could also be used to thank donors for their gifts.

To demonstrate accountability, Waters (2007a) suggested that organizations provide information about how gifts were used and their programs’ impact on the community, Form 990s, financial information, annual reports, and information about organizational management and leadership on their Web sites. These could also be included in blogs and organization profiles on social networking sites. Waters (2007a) argued that relationships can be nurtured in an electronic environment by providing involvement opportunities, such as virtual discussions or events.

**Theory of Social Media Use in Fundraising**

Based on the literature previously reviewed, this study presents a theory of social media use in fundraising. The theory integrates scholarly and practitioner literature on fundraising, public relations and technology use to explain how and why fundraising practitioners use social media in their work (see Figure 1-2).
Referring to Figure 1-2, the theory of social media use in fundraising posits that fundraisers’ actual use of social media in fundraising is a direct function of their behavioral intention to use social media in their work. This prediction is drawn from Davis’ (1986, 1989) work on the TAM, which—as previously discussed—argues that individuals’ actual use of a given technology is a direct function of their behavioral intention to use the technology. A positive relationship exists between these two variables.
The theory of social media use in fundraising posits that fundraisers’ behavioral intention to use social media in fundraising is a direct function of six variables—fundraisers’ perceived ease of use of social media, perceived usefulness of social media, perceived donor use of social media, perceived organizational use of social media, fundraisers’ ages and the size of the fundraising department. Positive relationships exist between fundraisers’ behavioral intention to use social media and all predictor variables except fundraisers’ ages, which is posited as a negative relationship.

Two of these six predictor variables—perceived ease of use and perceived usefulness of social media—are drawn from Davis’ (1986, 1989) work on the TAM, in which he posited that an individual’s behavioral intention to use a technology was a function of his or her perception of how easy that technology was to use and his or her perception of how useful that technology would be. The conceptual definition of TAM’s perceived usefulness construct is similar to UTAUT’s performance expectancy construct (Venkatesh et al., 2003). As previously discussed, Sweetser, Avery, Lariscy and Howes (2009) included this construct in their model that significantly predicted the use of social media in American corporations’ public relations departments. TAM also posited that individuals’ perceptions of how useful a technology is are determined by their perceptions of how easy that technology is to use (Davis, 1986, 1989). Following TAM, the theory of social media use in fundraising posits that fundraisers’ perceptions of how useful social media are in fundraising are determined by their perceptions of how easy social media are to use.

Again, Sweetser, Avery, Lariscy and Howes’ (2009) study applied UTAUT to significantly predict social media use in American corporations’ public relations departments, including the original facilitating conditions construct as part of their model. Following UTAUT’s facilitating
conditions construct, which evaluates the extent to which the individual believes they have the resources necessary to use the technology in question, the theory of social media use in fundraising posits that the size of the fundraising staff will impact fundraisers’ behavioral intention to use social media in fundraising. Respondents in the NTEN (2009) study of nonprofits’ use of social networks cited lack of resources, including human, as a major reason they did not integrate social media into their work.

As previously discussed, both UTAUT (Venkatesh, et al., 2003) and the TRA (Ajzen & Fishbein, 1973; Fishbein, 1967; Fishbein & Ajzen, 1975), from which Davis (1986, 1986) adapted the TAM, posit that individuals’ behavioral intention to act is influenced by their perceptions of whether relevant influentials support performing the behavior in question. UTAUT’s social influence construct measures the extent to which individuals perceive those who influence their behavior support using the technology in question (Venkatesh, et al., 2003). In Sweetser, Avery, Lariscy and Howes’ (2009) study, only social influence significantly contributed to the prediction of the use of social media by corporations’ public relations departments. The conceptual definition of TRA’s social norm construct is very similar to UTAUT’s social influence construct (Ajzen & Fishbein, 1973; Fishbein, 1967; Fishbein & Ajzen, 1975). Following these two theories, the theory of social media use in fundraising posits that fundraisers’ perceptions of their donor publics’ use of social media and the extent to which their organization uses social media for fundraising will impact their behavioral intention to use social media for fundraising.

The literature on Americans’ use of digital and social media previously presented demonstrated that, while the use of social media is growing among older generations of Americans, younger generations of Americans still have more experience using social media.
(Pew, 2008). Fundraisers’ age, therefore, should impact their behavioral intention to use social media in their work. Specifically, this study posits a negative relationship between fundraisers’ age and their behavioral intention to use social media in their work.

Based on studies demonstrating that fundraisers’ perceptions and use of new technology differ based on the role they predominantly enact (Anderson & Reagan, 1992; Johnson, 1997; Kelleher, 2001) the theory of social media use in fundraising argues that fundraisers’ predominant role will be related to three of the theory’s variables—perceived usefulness of social media in fundraising, behavioral intention to use social media in fundraising and actual use of fundraising. These perceptions and behavior should differ by the roles fundraisers predominantly enact.

Finally, based on a thorough review of scholarly and practitioner literature on the fundraising process, the theory presented in this study posits that fundraisers can apply social media to the research, programming and stewardship steps of the fundraising process, but not to the objectives and evaluation steps of this process. The theory posits that respondents’ application of social media to the research, programming and stewardship steps of the fundraising process will differ by the role fundraisers predominantly enact.

In short, the theory of social media use in fundraising argues that fundraisers’ social media use can be predicted by the combination of seven variables: perceived donor use of social media, organizational use of social media, perceived usefulness of social media, perceived ease of use of social media, fundraisers’ ages, the size of the fundraising department and behavioral intention to use social media in fundraising. The theory posits that fundraisers can apply social media to the research, programming and stewardship steps of the fundraising process. Finally, the theory posits that application of social media to the research, programming and stewardship
steps of the fundraising process will differ by the role fundraisers predominantly enact. The research questions and hypotheses used to test the theory will be presented in the next section.

**Research Questions and Hypotheses**

As the trend studies previously described demonstrate, digital and social media are now a critical source of information and media choice of Americans. What does this trend mean for public relations practitioners, including fundraisers? Top scholars have argued that public relations, at its most effective, is the management of relationships with strategic publics, those groups which most impact the organization’s success (L. Grunig, et al., 2002). The essential task of relationship management is communicating with these groups (Kelly, 1998a). For the strategic communicator, the trends outlined in this literature review entail a need to rethink the fundraising process, including where we will “go” to communicate with key publics. Selection of communication channels should ideally be based on knowledge and research, not assumptions. This is not a new concept for the strategic practitioner. Still, USC and Ketchum (2008) emphasized disharmony between media consumers’ preferences and the practices of professional communicators, which overemphasize traditional information channels, such as advertising and direct mail.

Practitioners must consider that strong programming may require embracing new channels of communication that require that they communicate in different ways. Universal McCann (2008) argued that blogs now rival any traditional media outlet in terms of reach and social, political and cultural impact and that practitioners should target these as they would mainstream media. Blogs, the authors argued, are ideal for measuring customer opinions and responses to marketing initiatives and as a forum for research and reputation management. USC and Ketchum (2008) emphasized that key publics’ social media use represents an opportunity for organizations to engage in unmediated dialogue with stakeholder groups. Success in this
environment requires that practitioners focus on relationships and dialogue over self-centered monologue, that their messages be contextual rather than flagrantly commercial and that practitioners act as strong advocates for their organization. Universal McCann (2008) noted that honesty, transparency and sincere interest in key publics are essential as the lack thereof is easily recognized when communicating in these formats.

Practitioner and academic literature demonstrates that practitioners are beginning to integrate social media into their jobs and believe social media has the potential to enhance the profession. Although some nonscientific work exists which describes the prevalence of using this technology among practitioners and how practitioners are using these new technologies, no comprehensive theory exists which explains use of technology by practitioners. Based on the above literature review, both the TAM and roles theory seem to provide promising frameworks for explaining practitioners’ use of social media in fundraising. Therefore, this dissertation presents the following hypotheses and research questions:

- **H1:** The higher fundraisers’ perceived ease of use of social media, the higher their perceived usefulness of social media.
- **H2a:** The higher fundraisers’ perceived usefulness of social media, the higher their behavioral intention to use social media.
- **H2b:** The higher fundraisers’ perceived ease of use of social media, the higher their behavioral intention to use social media.
- **H3:** The higher fundraisers’ organizational use of social media, the higher their behavioral intention to use social media.
- **H4:** The higher fundraisers’ perceived donor use of social media, the higher their behavioral intention to use social media.
- **H5:** The larger the size of the fundraising staff, the higher the fundraisers’ behavioral intention to use social media.
- **H6:** The lower fundraisers’ ages, the higher their behavioral intention to use social media.
• **H7:** The higher fundraisers’ behavioral intention to use social media, the higher their actual use of social media.

• **H8:** The combination of perceived ease of use, perceived usefulness, behavioral intention to use social media, age, size of fundraising staff, organization use and perceived donor use of social media predicts fundraisers’ actual use of social media.

• **RQ1:** To what extent do respondents predominantly enact each of the four fundraising roles (technician, liaison, expert prescriber and problem-solving process facilitator)?

• **RQ2:** Can the four fundraising roles be collapsed into a manager-technician dichotomy?

• **RQ3:** To what extent do fundraisers use social media in the research, programming and stewardship steps of the fundraising process?

• **RQ4:** Do fundraisers differ on use of social media in steps of the fundraising process by the role they predominantly enact?
CHAPTER 3
METHODOLOGY

Having reviewed the literature in which the study is grounded, this chapter turns to a discussion of the current study’s methodology. This section will present: (1) the study’s design, (2) the population and sampling method, (3) instrument design, (4) pre-testing the instrument, (5) development of the electronic survey, (6) data collection procedures, (7) a post-hoc sample and (8) data analysis procedures.

Study Design

In that this study sought to explain fundraisers’ use of social media, a research method that would yield generalizeable results was desirable. Survey research was selected. Survey research’s ability to provide, with appropriate sampling, a thorough picture of the thoughts and behaviors of a large, geographically diverse population, made it an attractive method for the current study, which sought to generate knowledge about fundraisers as a group (Poindexter & McCombs, 2000).

As the study was national in scope, it used online surveys, which are more suitable for reaching such populations and less expensive than personal and telephone interviews (Alreck & Settle, 2004). Although this method does not allow for interaction with respondents, this was deemed unnecessary if the questionnaire included clear directions and a user-friendly format. Pre-testing helped ensure this was the case. Several authors claim that response rates for Internet surveys tend to be lower than for other modes of data collection (Cook, Heath, & Thompson, 2000; Dillman, Phelps, Tortora, Swift, Kohrell, & Berk, in press).

Online surveys have other disadvantages that were mitigated due to the specific nature of this study. First, because this study sampled fundraisers, it was extremely unlikely they did not have Internet access. Moreover, as will be discussed in the next section, a complete sampling
frame for the population to be studied was available. For this study, Internet surveys were particularly attractive for their cost effectiveness and ability to reach a widely dispersed audience. Finally, the researcher felt that administering a questionnaire studying new technology via telephone or physical mail, as opposed to email, might lessen the credibility of the study.

**Population and Sampling Method**

In that this study was interested in the work of fundraisers, the sampling frame was the Association of Fundraising Professionals’ (AFP) American membership. AFP is an international professional association, with about 30,000 U.S. members (AFP, 2007). A 2007 membership study revealed the following distribution of members across charitable sub-sectors: education (22.8%), arts and culture (22.3%), social services (22.3%), public and societal benefit (10.7%), environmental and animals (8.7%), health (5.5%), other (5.2%) and religious (2.5%). In 2006, 42.2% of AFP’s membership raised less than $5 million in donations, 36.3% raised between $1 million and $5 million dollars and 21.4% raised over $5 million. The report revealed the following distribution of members across geographic regions: Midwest (27.3%), Mid-Atlantic (22.1%), South (16.1%), Southwest (11.4%), Pacific (10.9%), New England (7.4%) and Mountain (2.2%) (AFP, 2007). As these figures demonstrate, the organizations represented in AFP constitute an extremely diverse group, spanning all subsectors and U.S. geographic regions.

Though several other fundraising professional associations exist, such as the Association for Healthcare Philanthropy (AHP) and the Council for Advancement and Support of Education (CASE), these associations consist of fundraisers from the healthcare and education sectors, respectively (Kelly, 1998a). Unlike the use of AHP or CASE, use of AFP’s American membership as a sampling frame would generate findings applicable across sectors. This sampling frame meets Alreck and Settle’s (2004) criterion of exclusivity. As a member of AFP,
the researcher was able to access the organization’s online membership directory, which included email addresses.

Babbie (2007) argued that a systematic sample, in which every \( k \)th unit is drawn from a sampling frame, is virtually identical to simple random sampling, but usually superior. The only danger involved with systematic sampling is periodicity in which the sampling frame units are arranged in a cyclical pattern that coincides with the sampling interval to produce a biased sample. This was not a concern for the sampling frame used in this study. Following the process recommended by Alreck and Settle (2004), the author used a random number table to select a starting point within the membership directory. The sampling interval (\( k \)) was then determined by dividing 25,000, the number of units in the sampling frame, by 400, the desired sample size. For a population of 25,000 units, the required sample size for a 5% margin of error, where the confidence level is 95% and \( p = .05 \), is approximately 400 units (Agresti & Finlay, 1997). Because AFP members can elect to be omitted from the online membership directory, approximately 5,000 of AFP’s U.S. members are not included in this sampling frame. After determining the desired sample size and skip interval \( k \), every \( k \)th name was then drawn from the membership directory.

**Instrument Design**

The questionnaire consisted of five parts (see Appendix C). Part 1 collected information about the respondent’s employing organization. Part 2 measured the respondents’ perceptions of the ease of use and usefulness of social media, as well as his or her behavioral intention to use social media. Part 3 evaluated how respondents currently using social media integrated these tactics into the fundraising process. Part 4 used existing fundraising role indices to determine each respondent’s predominant role. Finally, Part 5 collected demographic information about the respondent. To ensure responses were indicative of the individual fundraiser’s views and
behaviors, as opposed to those of the organization, respondents were instructed to answer the questions from an individual perspective.

In Part 1 of the questionnaire, respondents were asked to report their organizations’ primary mission and geographic region, both measured on nominal scales. Ratio scale questions asked respondents to estimate the number of full-time fundraisers on staff, the organization’s approximate total revenue in the last fiscal year and private gifts raised by the organization in the last fiscal year. Respondents were also asked to estimate what percentage of three donor groups—all donors (including foundations and corporations), individual donors and major donors—use social media weekly. Using a nine-point Likert or interval scale ranging from “very frequently” to “not at all frequently,” respondents were asked to report how often their respective organizations used social media for fundraising.

Table 3-1. Indices of Technology Acceptance Model’s Variables Measures.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived Ease of Use</td>
<td>My interaction with social media is/would be clear and understandable.</td>
</tr>
<tr>
<td></td>
<td>I would/do find social media easy to use.</td>
</tr>
<tr>
<td></td>
<td>Learning to operate social media would be/is easy for me.</td>
</tr>
<tr>
<td></td>
<td>It would be/is easy for me to become skillful at using social media.</td>
</tr>
<tr>
<td>Perceived Usefulness</td>
<td>I would/do find social media useful in my job.</td>
</tr>
<tr>
<td></td>
<td>Using social media would/does allow fundraising tasks to be accomplished more quickly.</td>
</tr>
<tr>
<td></td>
<td>Using social media would/does increase fundraising productivity.</td>
</tr>
<tr>
<td>Behavioral Intention to Use</td>
<td>I plan to use social media for fundraising in the next 12 months.</td>
</tr>
<tr>
<td></td>
<td>I predict I will use social media for fundraising in the next 12 months</td>
</tr>
<tr>
<td>Actual Use of Social Media</td>
<td>I very frequently use social media in my job.</td>
</tr>
<tr>
<td></td>
<td>I use social media to accomplish tasks assigned to me.</td>
</tr>
</tbody>
</table>
Part 2 of the survey evaluated practitioners on the three independent variables of the TAM: perceived ease of use of social media, perceived usefulness of social media and behavioral intention to use social media. To measure these three variables, the study applied the indices presented by Davis (1986, 1989) in his original work on the TAM (see Table 3-1). Respondents were asked to evaluate a series of statements using a nine-point Likert scale ranging from “strongly agree” to strongly disagree.” Alternate verb tenses were used so the items would apply to both practitioners currently using social media on the job and those not yet using social media. These indices were tested for reliability, as will be discussed in Chapter 4.

Using items summarized in Table 3-2, Part 3 of the survey explored how practitioners used social media in the fundraising process. First, participants were asked to respond to the item “Do you personally use social media in your fundraising job?” with “yes” or “no.” Respondents who selected “no” moved past this portion of the survey to Part 4.

Based on the review of the scholarly and practitioner literature, the author determined that, of the five steps of the fundraising process, fundraisers could theoretically apply social media to three of the steps: research, programming (both cultivation and solicitation) and stewardship. The objectives and evaluation steps were not measured.

Original indices of measures were developed to describe ways respondents could utilize social media for research and programming (both cultivation and solicitation). To develop these indices, the researcher first conducted a thorough review of both scholarly and practitioner fundraising literature discussing the strategic fundraising process, paying special attention to discussions of research and programming. The results of this literature review were discussed in Chapter 2. The researcher then conceptualized how social media might be applied to accomplish tasks involved in each step of the fundraising process and constructed items to express these
conceptual definitions. These indices were tested for reliability during data analysis, as will be discussed in Chapter 4.

As previously discussed, Kelly (1998a) conceptualized four elements of effective stewardship: reciprocity, responsibility, reporting and relationship-nurturing. Waters (2007b) later developed indices of measures to evaluate practitioners’ enactment of the four elements of stewardship, which were later revised by Dell (2009). The present study adapted four of these measures, one to express how each of the four elements of stewardship could be carried out using social media.

Table 3-2. Indices of Application of Social Media to Fundraising Process Steps.

<table>
<thead>
<tr>
<th>Step</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>I track social media to learn public opinion of our organization.</td>
</tr>
<tr>
<td></td>
<td>I use social media to identify key individuals who are talking and posting about our organization.</td>
</tr>
<tr>
<td></td>
<td>I track social media to find conversations about our organization.</td>
</tr>
<tr>
<td></td>
<td>I track our competitors using social media.</td>
</tr>
<tr>
<td>Programming</td>
<td>I use social media to inform donors and potential donors about our organization. (cultivation)</td>
</tr>
<tr>
<td></td>
<td>I use social media to correct rumors and inaccurate information about our organization. (cultivation)</td>
</tr>
<tr>
<td></td>
<td>I use social media to request donations. (solicitation)</td>
</tr>
<tr>
<td></td>
<td>I use social media to obtain pledges from donors. (solicitation)</td>
</tr>
<tr>
<td>Stewardship</td>
<td>I use social media to assure donors their contributions are appreciated. (reciprocity)</td>
</tr>
<tr>
<td></td>
<td>I use social media to assure donors we adhere to the highest ethical standards. (responsibility)</td>
</tr>
<tr>
<td></td>
<td>I use social media to tell donors how the organization has used their gifts. (reporting)</td>
</tr>
<tr>
<td></td>
<td>I use social media to encourage donor involvement. (relationship nurturing)</td>
</tr>
</tbody>
</table>

For each stewardship element, the one measure describing activities that could most realistically be carried out using social media was selected for inclusion in the questionnaire. The author reasoned that fundraisers would not likely use social media for some of the activities...
described in the original measures. For example, the author reasoned that while fundraisers might use social media to engage in reporting by generally describing how donors’ gifts were used, fundraisers would be less likely to provide detailed financial information (e.g., Form 990s, how much the organization raised last year and other information about the organization’s finances) using social media. Detailed financial information is usually included in a charitable organization’s annual report, downloadable from the organization’s Web site or available upon request. Respondents were asked to evaluate each item based on a nine-point Likert scale ranging from “strongly agree” to “strongly disagree.” This index was tested for reliability during data analysis.

Part 4 evaluated fundraisers’ on-the-job behaviors to determine predominant role enacted. The indices of fundraising role measures developed by Kelly (1998a), adapted from Broom (1982) and Dozier (1992), were utilized (see Table 3-3). Respondents were asked to evaluate each item on a nine-point Likert scale ranging from “strongly agree” to “strongly disagree.”

Table 3-3. Indices of Fundraiser Role Measures.

<table>
<thead>
<tr>
<th>Fundraising Role</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technician</td>
<td>I write fundraising materials on issues and donors.</td>
</tr>
<tr>
<td></td>
<td>I edit fundraising materials written by others.</td>
</tr>
<tr>
<td></td>
<td>I produce brochures, pamphlets, etc.</td>
</tr>
<tr>
<td></td>
<td>I handle technical aspects of producing materials.</td>
</tr>
<tr>
<td></td>
<td>I coordinate photography and graphics.</td>
</tr>
<tr>
<td></td>
<td>I maintain media contacts and place press releases.</td>
</tr>
<tr>
<td>Liaison</td>
<td>I represent the organization at events and meetings.</td>
</tr>
<tr>
<td></td>
<td>I inform management of donor reactions to policies.</td>
</tr>
<tr>
<td></td>
<td>I create opportunities for management to hear donors.</td>
</tr>
<tr>
<td></td>
<td>I keep the organization informed about media reports.</td>
</tr>
<tr>
<td></td>
<td>I report donor opinion survey results to management.</td>
</tr>
<tr>
<td></td>
<td>I conduct research to identify problems with donors.</td>
</tr>
</tbody>
</table>
Table 3-3. Continued

<table>
<thead>
<tr>
<th>Fundraising Role</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expert Prescriber</td>
<td>I take responsibility for success or failure of fundraising.</td>
</tr>
<tr>
<td></td>
<td>Others hold me accountable for fundraising success.</td>
</tr>
<tr>
<td></td>
<td>Others consider me the fundraising expert.</td>
</tr>
<tr>
<td></td>
<td>I plan actions for pursuing fundraising opportunities.</td>
</tr>
<tr>
<td></td>
<td>I make the fundraising policy decisions.</td>
</tr>
<tr>
<td></td>
<td>I diagnose and explain fundraising opportunities.</td>
</tr>
<tr>
<td>Problem Solving Process</td>
<td>I encourage management participation in fundraising decisions.</td>
</tr>
<tr>
<td>Facilitator</td>
<td>I emphasize a systematic planning process to management.</td>
</tr>
<tr>
<td></td>
<td>I keep management involved in all phases of fundraising.</td>
</tr>
<tr>
<td></td>
<td>I outline alternative approaches for pursuing opportunities.</td>
</tr>
<tr>
<td></td>
<td>I operate as a catalyst in management’s decision-making.</td>
</tr>
</tbody>
</table>

Part 5 consisted of a series of questions collecting demographic information about the respondent. Respondents were asked to report their gender, race/ethnic background, highest level of education, level of their current position (e.g., entry-level, staff middle manager, staff senior manager), whether they were head of fundraising for their organization and with which fundraising program their job responsibility primary fell (e.g., annual giving or major gifts). All these variables were measured at the nominal level. Respondents were asked to report their age, measured at the ordinal level. Open-ended questions asked respondents to report the number of years they had worked in their current positions and for their current employers.

**Pre-testing the Instrument**

A pre-test was conducted using a sample similar to the one used in the study, but which did not overlap with the present study’s sampling frame, as recommended by DeVillis (1991). Drawing on personal connections, the researcher arranged to administer the questionnaire to 10 fundraisers who were not AFP members. Participants were emailed a copy of the draft
questionnaire, completed the questionnaire independently and participated in a telephone interview in which they discussed their responses with the researcher as well as provide general feedback about the survey. Feedback on the pre-test generated from telephone interviews was incorporated into the final questionnaire. Half of the pre-test participants indicated they currently use social media in their work.

Developing the Electronic Survey

Following Institutional Review Board (IRB) approval (see Appendix A), the survey was produced in Gainesville, FL using Survey Monkey, a subscription online survey tool. This tool creates electronic surveys that respondents can access, complete and submit using a link designated for the survey. Data are automatically collected in a format that can be exported into SPSS for analysis.

All items for the questionnaire’s five sections were written and their measurement scales selected prior to opening the Survey Monkey account. Informed consent information, a survey introduction, general questionnaire directions, directions for questionnaire sections and exit page information were written and finalized in advance.

Using Survey Monkey’s survey design tool, the researcher inputted these materials to construct an electronic survey with ten sections or pages, which were labeled with the following headers as visible to respondents:

- Informed consent for participation in study
- Entry page
- General survey directions
- Organization questions
- Social media in fundraising questions
- Social media in fundraising questions cont’d
- Social media use questions
- Fundraising job responsibilities
- Individual questions
- Exit page
The organization questions section included the items about the respondents’ employing organizations discussed in the previous section. The social media in fundraising questions section measured respondents on TAM’s predictor variables. The social media in fundraising (cont’d) section contained the filter question previously discussed. How this filter functioned will be discussed later. The social media use questions section measured respondents’ application of social media to the fundraising process while the fundraising job responsibilities section included the fundraising roles measures previously discussed. Finally, the individual questions section included demographic questions about the respondent.

Respondents inputted their answers to questionnaire items by typing responses into boxes provided for open-ended questions and clicking the response bubble representing their desired answer for multiple-choice questions. Survey Monkey’s design features allowed the researcher to prevent respondents from providing more than one response to multiple-choice questions as more than one answer was inappropriate for all multiple-choice questions included in the questionnaire. Where appropriate, respondents were provided an “other” answer option and a text box in which they were asked to explain their selection.

Respondents moved from one survey section to the next by clicking a button labeled “next” which appeared at the bottom of each questionnaire section or page. Survey Monkey allowed the researcher to generate an error message alerting participants to any items they had neglected to complete. If the respondent chose to click “next” again without completing these items, the error message was not generated a second time. The researcher could also control the flow of respondents through the survey, preventing them from revisiting previously viewed pages or skipping ahead to subsequent sections. Using the design features of Survey Monkey, the
researcher was able to select a high-contrast, black and white color scheme respondents could easily view.

As is now approved by IRB policies, respondents were asked to indicate their informed consent by responding to an item included at the end of the first section (see Appendix A). That item had two answer options: “I voluntarily agree to participate in the procedure . . . .” and “I do not agree to participate in the study.” Respondents who selected the latter were automatically routed to the questionnaire’s exit page when they selected “next,” while respondents who selected the prior option continued to the entry page section.

The section entitled social media in fundraising (cont’d) contained the filter question that asked whether respondents personally use social media in their work and included two possible responses: “yes” and “no.” Respondents who selected “no” were automatically routed to the fundraising job responsibilities section, which contained fundraising roles items, once they clicked “next,” while respondents who selected “yes” continued to the social media use section, which measured application of social media to steps of the fundraising process.

Data Collection Procedures

An e-mail serving as a cover letter was sent to the 400 sample members at the e-mail address included in the AFP directory entry (see Appendix B). The e-mail explained the purpose and value of the study and invited recipients to participate by clicking a link to the questionnaire imbedded in the e-mail. Each survey respondent received a unique link generated by Survey Monkey, which prevented respondents from completing the survey more than once or forwarding the survey to colleagues. Some e-mail invitations could not be delivered due to “bad” e-mail addresses. Moreover, in the interest of ethical research, the invitation provided respondents with a link allowing them to opt-out of the survey and have their contact information removed from the study’s mailing list. In these cases, the entries in question were located within
the online membership directory. An e-mail invitation was then sent to the next individual in the online directory until the message was successfully delivered.

Two and four weeks after receiving the initial survey invitation, respondents were sent reminder emails containing the same unique, imbedded link to the online questionnaire (see Appendix B), which ultimately resulted in 147 completed questionnaires, or a 36.7% response rate. As previously stated, the survey responses were collected electronically using Survey Monkey. This tool assigns a case number to each questionnaire collected, which allows each individual document to be viewed if questions arise during data analysis. The survey responses were imported directly into SPSS. The file was cleaned by revisiting individual questionnaires to ensure any missing and outlier values were correct.

**Post-hoc Sample**

In addition to the survey of the original scientific sample of 400 AFP members, the instrument was distributed to a larger sample of 3,600 AFP members to allow for post-hoc analysis and comparison of results. This sample was in addition to the original scientific sample of 400 AFP members and no recipients of the original invitation were included in this sample. The same data collection procedures were followed, resulting in 686 completed questionnaires being received, for a response rate of 19%. The two groups provided a total of 833 fundraising respondents. The purpose of conducting this second, larger sample was to provide a second dataset to compare with data collected from the original sample of AFP members, thus further validating findings generated from the original dataset.

**Data Analysis Procedures**

Descriptive statistics were employed to summarize and present the data set while inferential statistics were used to draw conclusions about the population studied.
Hypotheses 1, 2a, 2b, 3, 4, 5, 6 and 7 addressed relationships between (1) perceived ease of use of social media and perceived usefulness of social media, (2) perceived usefulness of social media and behavioral intention to use, (3) perceived ease of use and behavioral intention to use, (4) organization use and behavioral intention to use, (5) perceived donor use and behavioral intention to use, (6) size of fundraising staff and behavioral intention to use, (7) fundraisers’ age and behavioral intention to use and (8) behavioral intention to use and actual use of social media, respectively. These hypotheses were tested using the Pearson’s (r) correlation statistic and bi-variate regression.

Respondents’ mean scores on each index were calculated by computing a new variable that summed respondents’ scores on each item measuring a given variable and dividing by the number of items measuring that variable. For example, a respondent’s mean score on the index of perceived ease of use of social media was calculated by adding that respondent’s scores on the four items measuring perceived ease of use of social media. This total was then divided by four, since four items were used to measure that variable.

Hypothesis 8, which stated the combination of perceived ease of use, perceived usefulness, behavioral intention to use, age, organizational use, perceived donor use of social media and size of fundraising staff would predict actual use of social media, was tested using multiple regression.

The first research question asked to what extent respondents predominantly enacted each of the four fundraising roles. This research question was answered by calculating mean scores and standard deviations.
Research Question 2 asked whether the four fundraising roles could be collapsed into a manager-technician dichotomy. Principal axis factor analysis with varimax rotation was used to answer this research question.

Research Question 3 asked in which steps of the fundraising process respondents use social media. This research question was answered by calculating mean scores and standard deviations.

Finally, Research Question 4, which asked whether fundraisers report applying social media to the fundraising process differently based on the role they predominantly enact, was answered using one-way Analysis of Variance (ANOVA). The results of these analyses are presented in Chapter 4.
CHAPTER 4
RESULTS

This chapter presents results of hypothesis testing as well as answers to the study’s research questions. The findings demonstrate that, albeit to a modest degree, fundraising practitioners are beginning to integrate social media into their work. The findings also help improve understanding of how and why fundraisers use social media in their work and describe how they currently use social media in different steps of the fundraising process.

Distribution of Data

Distribution of data for the study’s main variables was first examined to ensure the researcher could appropriately use parametric statistical tests, many of which assume data are normally distributed. The skewness statistics for the study’s main variables were examined to ensure all variables were normally distributed. Skewness for each variable was less than plus or minus one (< +/-1.0), which demonstrated that data on all variables were normally distributed (Morgan et al., 2004).

Participant Demographics

The majority of the study’s respondents were female (75.2%), reflecting the gender composition of AFP and the fundraising profession. The largest racial group was Caucasian/not Hispanic (89.8%), followed by Hispanic (5.1%), African American (2.9%) and Asian/Pacific Islander (.7%). The majority of respondents (approximately 58%) were between ages 35 and 54 years old. The youngest and oldest working generations were not well-represented in the study’s sample. Twenty-three percent of respondents were aged 55 or older, while 18% were aged 35 or younger. Respondents were highly educated, with approximately 93% having obtained at least a bachelor’s degree.
Fundraising leadership was well represented in the present study, while entry-level employees were in the minority. The majority of respondents (54%) reported that they were head of fundraising for their organization. Consistent with this finding, most respondents reported they were staff senior managers (53.3%) or staff middle managers (29.2%). Only 3% of the sample reported they were entry-level employees, and only one respondent reported he or she was a fundraising consultant. The largest proportion of respondents reported their job responsibilities primarily lay with annual giving (20.4%), followed by general management (17.5%), major gifts (17.5%), grant writing (3.6%), capital campaigns (2.9%), special events (2.9%), foundation relations (2.2%), planned giving (2.2%), support services (2.2%) and corporate relations (.7%).

Likely reflecting the professional experience and upward mobility of the sample, the study’s respondents reported relatively short tenure both in their current position and with their current employer. The vast majority of respondents, approximately 71%, had been in their current position for five years or less. Approximately 38% of respondents’ tenure with their current employer was five years or less. Only about 10% of the sample had worked for their current employer six years or longer.

The study’s respondents were asked to report their employing organizations’ primary missions. The largest percentage of respondents was employed by the education subsector (29.2%), followed by human (21.9%) and health (20.4%) services. This is not surprising given the relatively large size of these subsectors and the large number of fundraisers these organizations employ. In keeping with this finding, most respondents’ organizations had sizeable fundraising staffs. Approximately 17% of respondents’ organizations employed between 11 and 50 full-time fundraisers, and approximately 20% employed four to 10 full-time fundraisers. It is
not unusual for one employee to constitute a small charitable organization’s fundraising department, but only 29% of the study’s respondents reported this to be the case in their organizations.

**Organizations’ Use of Social Media for Fundraising**

Although the study primarily sought to analyze how and why individual fundraisers apply social media in their work, the first section of the questionnaire did attempt to determine how frequently respondents’ organizations were using social media for fundraising. Respondents were asked to report, using a nine-point Likert-like scale, how frequently their *organization* uses social media for fundraising, where nine equaled very frequently and one equaled not at all frequently. The largest group of respondents (approximately 43%) selected one, indicating that their organization uses social media for fundraising not at all frequently, or rarely. Seventeen percent of respondents selected two, approximately 13% selected three, approximately 7% selected four and approximately 4% selected five. Only 15% of respondents selected six or higher. In short, only 19% of respondents selected five or higher, indicating their organizations use social media for fundraising frequently to very frequently.

On average, respondents reported that their organizations use social media infrequently for fundraising (*M* = 2.73, *SD* = 2.21). Post-hoc analysis of the larger AFP group of 686 additional fundraisers found almost identical results (*M* = 2.72, *SD* = 2.26). In other words, at the time of the study, organizations represented in AFP use social media for fundraising only infrequently.

It is recalled that the questionnaire included a filter question to ensure respondents not currently using social media in their work did not complete the section measuring application of social media to steps of the fundraising process. Only 61, or 41.5% of the study’s 147 respondents reported they were currently using social media in their fundraising work and, therefore, completed the relevant survey section. Again, post-hoc analysis of the larger sample of
fundraisers revealed similar results. Approximately 315, or 46%, of the 686 respondents reported they were currently using social media in their work. Although the percentage of social media users in the present study was low, it is similar to findings from *The Chronicle of Philanthropy*’s (2007) recent study of charitable organizations’ online fundraising behavior, which lends credibility to the findings. Although the brief snapshot of fundraising behavior provided by this survey data revealed relatively low usage of social media in fundraising, data collected in the *Chronicle*’s last few studies of online fundraising suggest this behavior will increase over time. Currently, fundraisers are likely still weighing the pros and cons of integrating social media into their work.

As also noted previously, participants were asked, using open-ended items, to estimate the percentage of three donor publics—all donors (including foundations and corporations), individual donors and major donors—that use social media weekly. A majority of the study’s respondents were either unsure about their donor publics’ use of social media or did not perceive that a majority of their donor publics use social media on a weekly basis. Approximately 19% of the study’s respondents reported either they could not estimate what percentage of the first two groups (all donors and individual donors) use social media weekly, as indicated by respondents writing in “don’t know,” “unsure,” “?” or a similar response, or they felt that this group does not use social media weekly, as indicated by the respondent writing “none,” “0” or a similar response. Respondents were even less sure about major donors’ use of social media, with 21% of respondents reporting they could not estimate this group’s weekly use of social media.

Approximately 70% of respondents estimated that less than half of all their organizations’ donors use social media weekly, and approximately 68% estimated that less than half of individual donors use social media weekly. Moreover, respondents believe their organizations’
major donors use social media even less frequently than the other two donor groups. Seventy-three percent of respondents estimated that less than 30% of the major donors to their organization use social media weekly. On average, respondents estimated that approximately 26% of all donors (including corporations and foundations), 27% of individual donors and 14% of major donors use social media weekly.

Several one-way ANOVAs were conducted to determine if respondents differed on the study’s main variables by the charitable subsector in which they were employed. For example, it is possible respondents employed by environmental organizations might perceive higher percentages of their donor publics use social media weekly, because environmental issues are popular with younger generations of Americans. No significant differences were found, however, for perceptions regarding donor publics’ usage of social media or on any other of the study’s main variables. In short, respondents’ perceptions of the percentage of their donor publics that use social media weekly do not differ by their employing charitable subsector.

**Reliability Testing of Technology Acceptance Model (TAM) Indices**

Prior to testing the study’s four hypotheses that proposed that the TAM can explain fundraisers’ use of social media, the reliability of the four indices of perceived ease of use, perceived usefulness, behavioral intention to use and actual use of social media scales was assessed. Three of the indices were adapted from Davis’ (1986, 1989) work on the TAM. Cronbach’s alpha for all four indices was greater than .70, suggesting the reliabilities of the scales are acceptable. Cronbach’s alphas of the indices are presented in Table 4-1. As shown in Table 4-1, the lowest Cronbach’s alpha was for the actual use of social media in fundraising index. Because this index was original to this study, this low (but still acceptable) reliability is not unexpected.
Mean scores on items and indices measuring TAM’s variables are also reported in Table 4-1. As discussed in Chapter 3, respondents evaluated these items on a nine-point Likert scale where one equaled strongly disagree and nine equaled strongly agree. On average, the study’s respondents agreed that social media was, or would be, easy to use ($M = 6.43, SD = 1.64$). They somewhat agreed that social media was, or would be, useful in their fundraising jobs ($M = 5.62, SD = 1.64$).

Correlation analysis revealed significant positive relationships between respondents’ estimates of the percentage of each of the three groupings of donor publics—all donors...
(including corporations and foundations), individual donors and major donors—that use social media weekly and respondents’ perceptions of how useful social media is in fundraising ($r = .34$, $r = .33$, $r = .30$, respectively). In short, the higher percentage of their donors a fundraiser thinks uses social media on a weekly basis, the more useful they think social media is in fundraising.

On average, respondents agreed that they intend to use social media for fundraising in the next 12 months ($M = 6.26$, $SD = 2.44$). Correlation analysis revealed that respondents’ behavioral intention to use social media in fundraising was significantly and positively correlated with respondents’ estimate of the percentage of the three groupings of donor publics that use social media weekly. On the other hand, respondents typically were neutral about their actual use of social media in their work ($M = 4.56$, $SD = 1.97$). In other words, as the mean represented the mid-point of the nine-point measurement scale, respondents neither agreed nor disagreed that they currently use social media in their fundraising jobs.

Although the study’s respondents, on average, felt neutral about their actual use of social media, the neutral overall mean for the actual use of social media index represented a set of respondent mean scores on that index ranging from one to nine. Approximately 23% of respondents had average scores ranging from 4.5 to 5.5, indicating they neither agreed nor disagreed they currently use social media in their work. Approximately 46% of respondents had mean scores below 4.5, indicating they disagreed they currently use social media in their work. Finally, the remainder of respondents, approximately 31%, had scores above 5.5, indicating that they at least slightly agreed they currently use social media in their work.

Again, post-hoc analysis revealed similar findings. On average, this sample of 686 fundraisers agreed that social media was, or would be, easy to use ($M = 6.47$, $SD = 1.83$) and that social media was, or would be, useful in their jobs ($M = 5.48$, $SD = 1.93$). Fundraisers agreed
they intend to use social media for fundraising in the next 12 months \((M = 6.14, SD = 2.52)\). Unlike respondents from the scientific sample of fundraisers, however, respondents from the large AFP sample slightly agreed that they currently use social media in their jobs \((M = 5.03, SD = 1.49)\). The range of respondents’ mean scores on this index, however, differed for the scientific and post-hoc samples. In the scientific sample, respondents’ scores ranged from one to nine. In the latter sample, no respondent had a mean score below two or above eight for the actual use of social media index. The range of mean scores in the post-hoc sample, therefore, was six.

**Hypothesis 1**

Following the TAM, Hypothesis 1 stated that fundraisers’ perceived ease of use of social media would tend to increase with their perceived usefulness of social media. To investigate if there was a statistically significant association between perceptions of ease of use and perceptions of usefulness, a correlation was computed between respondents’ mean scores on the indices of perceived ease of use and perceived usefulness of social media.

The Pearson Correlation coefficient was .41, \(p < .001\). The relationship is positive and significant. In other words, fundraising practitioners who perceive social media are easier to use, tend to perceive social media as more useful and vice versa. Using Cohen’s (1988) guidelines, the effect size is medium or typical.

Although this correlation shows that, as predicted by the TAM, a positive relationship existed between perceived ease of use and perceived usefulness of social media, it was necessary to use simple regression to confirm the directional relationship between these two variables. The regression would also determine the extent to which perceptions of ease of use predict perceptions of usefulness. The results were statistically significant: \(F(1,139) = 29.55, p < .001\). This result shows that perceived ease of use does reliably predict perceived usefulness of social media. The adjusted \(R^2\) squared value was .169, indicating that approximately 17% of the
variance in perceived usefulness was explained by perceived ease of use. According to Cohen (1988) this $R^2$ squared is a smaller than typical effect size.

Therefore, the null hypothesis of no association between the two variables was rejected and Hypothesis 1 of the study was supported. There is a positive and significant relationship between fundraisers’ perception of how easy social media is to use and how useful they consider social media to be. Moreover, though the effect size is small, fundraisers’ perceived ease of use does help predict how useful they consider social media to be in their work.

**Hypothesis 2a**

The second hypothesis, following the TAM, proposed a positive relationship between fundraisers’ perceptions of the usefulness of social media and their behavioral intention to use social media on the job. To investigate if there was a statistically significant association between perceptions of usefulness and behavioral intention to use social media, a correlation was computed using respondents’ mean scores on the indices of perceived usefulness and behavioral intention to use social media.

The Pearson Correlation coefficient was .66, $p < .001$. The relationship is positive and significant. In other words, fundraising practitioners who perceive social media as more useful tend to have higher behavioral intention to use social media and vice versa. Using Cohen’s (1988) guidelines, the effect size is larger than typical in behavioral sciences.

Following the correlation, regression determined the extent to which fundraisers’ perceived usefulness of social media impacts their behavioral intention to use social media. The results of the regression were statistically significant: $F(1,133) = 102.168, p < .001$. This shows that perceived usefulness of social media reliably predicts behavioral intention to use social media. The adjusted $R^2$ squared value was .43, indicating that 43% of the variance in behavioral intention
to use social media was explained by perceived usefulness. According to Cohen (1988) this R squared is a typical effect size.

Therefore, as predicted by TAM, there is a positive and significant relationship between how useful fundraisers perceive social media to be and their intention to use social media in their work. The null hypothesis of no relationship between the two variables was rejected, and Hypothesis 2a was supported.

**Hypothesis 2b**

Hypothesis 2b proposed a positive relationship between respondents’ perceptions of the ease of use of social media and their behavioral intention to use social media, as predicted in the TAM. To investigate if there was a statistically significant association between perceptions of ease of use and behavioral intention to use, a correlation was computed using respondents’ mean scores on the indices of perceived ease of use and behavioral intention to use social media.

The Pearson Correlation coefficient was .33, p < .001. The relationship is positive and significant. In other words, fundraising practitioners who perceive social media as more useful tend to have higher behavioral intention to use social media and vice versa. Using Cohen’s (1988) guidelines, the effect size is typical.

Regression was also conducted to determine how well perceptions of ease of use of social media predict behavioral intention to use social media. The results of the regression were statistically significant: $F(1,129) = 16.159, p < .001$. This result indicates that perceived ease of use of social media reliably predicts behavioral intention to use social media. The adjusted $R$ squared value was .10, indicating that 10% of the variance in behavioral intention to use social media was explained by perceived ease of use of social media. According to Cohen (1988) this $R$ squared is a smaller than typical effect size.
In short, there is a positive, significant relationship between fundraisers’ perceptions of how easy social media is to use and their behavioral intention to use social media in their work, as predicted by the TAM. Moreover, though the effect size is smaller than typical, fundraisers’ perception of how easy social media is to use does contribute to their behavioral intention to use social media on the job. The null hypothesis of no association between the two variables was rejected, and Hypothesis 2b was supported.

**Hypothesis 3**

Hypothesis 3 proposed a positive relationship between respondents’ organizations use of social media for fundraising and their behavioral intention to use social media. To investigate if there was a statistically significant association between perceptions of organizational use of social media for fundraising and behavioral intention to use social media in fundraising, a correlation was computed using respondents’ answers to the item in which they evaluated how frequently their organization uses social media for fundraising and respondents’ mean scores on the index of behavioral intention to use social media.

The Pearson Correlation coefficient was .36, \( p < .001 \). The relationship is positive and significant. In other words, fundraising practitioners who perceive their organizations use social media for fundraising more frequently tend to have higher behavioral intention to use social media in fundraising and vice versa. Using Cohen’s (1988) guidelines, the effect size is typical.

Regression was also conducted to determine how well perceptions of organizational use of social media for fundraising predict behavioral intention to use social media on the job. The results of the regression were statistically significant: \( F(1,139) = 21.083, p < .001 \). This result indicates that organization use of social media for fundraising reliably predicts behavioral intention to use social media. The adjusted \( R \) squared value was .13, indicating that 13% of the variance in behavioral intention to use social media was explained by organization use of social media.
media for fundraising. According to Cohen (1988) this $R^2$ squared is a smaller than typical effect size.

In short, there is a positive, significant relationship between fundraisers’ perceptions of how frequently their organization uses social media for fundraising and their behavioral intention to use social media in their work. Moreover, though the effect size is smaller than typical, fundraisers’ perception of how frequently their organization uses social media for fundraising does contribute to their behavioral intention to use social media on the job. The null hypothesis of no association between the two variables was rejected, and Hypothesis 3 was supported.

**Hypothesis 4**

Hypothesis 4 proposed a positive relationship between respondents’ perceived donor use of social media and their behavioral intention to use social media in their work. To investigate if there was a statistically significant association between perceived donor use of social media and behavioral intention to use social media in fundraising, three correlations were computed using respondents’ answers to the questionnaire items asking them to estimate what percentage of three donor publics—all donors (including foundations and corporations), individual donors and major donors—use social media weekly and respondents’ mean scores on the index of behavioral intention to use social media.

The Pearson Correlation coefficients were .33, .35 and .25 ($p < .001$). The relationships are all positive and significant. In other words, fundraising practitioners who perceive more of the donor public “all donors” uses social media tend to have higher behavioral intention to use social media in their work, as do fundraisers who perceive that more of their individual and major donors use social media. Using Cohen’s (1988) guidelines, the effect sizes are typical.

Three simple regressions were also conducted to determine how well respondents’ perceived percentages of the three donor publics who use social media predict behavioral
intention to use social media. The results of the regression for perceived percentage of all donors who use social media predicting behavioral intention to use social media were statistically significant: $F(1,116) = 13.943, p < .001$. This result indicates that perceived percentage of all donors who use social media reliably predicts behavioral intention to use social media. The adjusted $R$ squared value was .10, indicating that 10% of the variance in behavioral intention to use social media was explained by perceived percentage of all donors who use of social media. According to Cohen (1988) this $R$ squared is a smaller than typical effect size.

The results of the regression for perceived percentage of individual donors who use social media predicting behavioral intention to use social media were statistically significant: $F(1,117) = 15.825, p < .001$. This result indicates that perceived percentage of individual donors who use social media reliably predicts behavioral intention to use social media. The adjusted $R$ squared value was .11, indicating that 11% of the variance in behavioral intention to use social media was explained by perceived percentage of individual donors who use of social media. According to Cohen (1988) this $R$ squared is a smaller than typical effect size.

The results of the regression for perceived percentage of major donors who use social media predicting behavioral intention to use social media were statistically significant: $F(1,112) = 7.601, p < .001$. This result indicates that perceived percentage of major donors who use social media reliably predicts behavioral intention to use social media. The adjusted $R$ squared value was .06, indicating that 6% of the variance in behavioral intention to use social media was explained by perceived percentage of major donors who use of social media. According to Cohen (1988) this $R$ squared is a smaller than typical effect size.

In short, there are positive, significant relationships between fundraisers’ perceptions of the percentages of the three donor publics that use social media and their behavioral intention to use
social media in their work. Moreover, though the effect size is smaller than typical, fundraisers’ perceptions of the percentages of the three donor publics who use social media do contribute to their behavioral intention to use social media on the job. The null hypothesis of no association between the two variables was rejected, and Hypothesis 4 was supported.

**Hypothesis 5**

Hypothesis 5 proposed a positive relationship between the size of the fundraising staff and fundraisers’ behavioral intention to use social media in their work. To investigate if there was a statistically significant association between fundraising staff size and fundraisers’ behavioral intention to use social media, a correlation was computed using respondents’ answers to the item asking them to report the size of their organization’s fundraising staff and respondents’ mean scores on the index of behavioral intention to use social media. The results of the correlation were not significant. In short, there is not a positive, significant relationship between fundraising staff size and fundraisers’ behavioral intention to use social media in their work. The null hypothesis of no association between the two variables was not rejected.

**Hypothesis 6**

Hypothesis 6 proposed a negative relationship between respondents’ ages and their behavioral intention to use social media in fundraising. To investigate if there was a statistically significant association between respondents’ ages and behavioral intention to use social media in their work, a correlation was computed using respondents' mean scores on the index of behavioral intention to use social media and the item asking respondents to report their age. The results of this test were not statistically significant. In short, there is not a negative, significant relationship between fundraisers’ ages and their behavioral intention to use social media in their work. The null hypothesis of no association between the two variables was not rejected.
Hypothesis 7

The seventh hypothesis proposed a positive relationship between how much fundraisers use social media in their work and their behavioral intention to use social media. To investigate if there was a statistically significant association between behavioral intention to use and actual use of social media, a correlation was computed using respondents’ mean scores on the indices of behavioral intention to use social media and actual use of social media.

The Pearson Correlation coefficient was .26, $p < .05$. The relationship is positive and significant. In other words, fundraising practitioners who have higher behavioral intention to use social media tend to use social media more and vice versa. Using Cohen’s (1988) guidelines, the effect size is typical in this discipline.

Regression determined how well behavioral intention to use social media predicts actual use of social media. The results were statistically significant: $F(1,55) = 4.067, p < .05$. This indicates that behavioral intention to use social media reliably predicts actual use of social media. The adjusted $R$ squared value was .05, indicating that 5% of the variance in actual use was explained by behavioral intention to use. According to Cohen (1988) this $R$ squared is a smaller than typical effect size.

In short, there is a positive, significant relationship between fundraisers’ behavioral intention to use social media and how much they use social media, as predicted by the TAM. Moreover, behavioral intention to use social media does contribute to actual use of social media. The null hypothesis of no association between these variables was rejected, and Hypothesis 7 was supported.

Hypothesis 8

The fourth hypothesis proposed that the combination of perceived ease of use, perceived usefulness, age, size of fundraising staff, organization use of social media, perceived donor use
of social media and behavioral intention to use social media could be applied to explain fundraising practitioners’ use of social media. The study used simultaneous multiple regression to investigate the predictors of social media use. Prior to conducting the multiple regression, however, the study had to address the high correlation found between two predictor variables, perceived usefulness and behavioral intention to use social media, when testing Hypothesis 2a. Leech, Barrett and Morgan (2005) noted that intercorrelations above .5 between two or more predictor variables can indicate the presence of multicollinearity. This occurs when two predictor variables in a multiple regression contain much of the same information and can make it difficult to assess the effect of the independent variable or variables on the dependent variable. Hair (1998) cautioned that “highly collinear variables can distort the results substantially or make them quite unstable and thus not generalizeable” (p. 208). In order to examine the underlying structure of the items representing the TAM’s predictor variables, the study used factor analysis. The results of this factor analysis will be discussed in the following section.

**Factor Analysis of the TAM Predictor Variables**

First, principal axis factor analysis with varimax rotation was conducted in order to assess the underlying structure for the items representing the TAM’s three predictor variables: perceived ease of use, perceived usefulness and behavioral intention to use social media. This type of exploratory factor analysis is appropriate when a researcher has reason to believe that there are latent variables underlying the variables or items that were measured, as was the case in the current study. A principal axis factor analysis will show whether the items used to measure each construct actually do “hang together” (i.e., whether participants’ responses to items measuring a given variable are more similar to each other than they are similar to responses to items measuring another variable).
After varimax rotation, two factors emerged. The first factor accounted for 50.2% of the variance, and the second accounted for 21.2% of the variance. Table 4-2 displays the items and factor loadings for the rotated factors. Leech, Barrett and Morgan (2005) note that factor loadings below the absolute value of .30 are generally considered low while those equal to or greater than the absolute value of .40 are typically considered high. Therefore, factor loadings less than .30 are omitted from the table to improve clarity.

Table 4-2. Factor Loadings for Two Rotated Factors.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Items</th>
<th>Factor Loading</th>
<th>Cognitions about Social Media in Fundraising</th>
<th>Perceived Ease of Use of Social Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceived Ease of Use</td>
<td>My interaction with social media is/would be clear and understandable.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I would/do find social media easy to use.</td>
<td>.34</td>
<td>.78</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Learning to operate social media would be/is easy for me.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>It would be/is easy for me to become skillful at using social media.</td>
<td></td>
<td></td>
<td>.81</td>
</tr>
<tr>
<td>Perceived Usefulness</td>
<td>I would/do find social media useful in my job.</td>
<td>.85</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Using social media would/does allow fundraising tasks to be accomplished more quickly.</td>
<td>.76</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Using social media would/does increase fundraising productivity.</td>
<td></td>
<td></td>
<td>.79</td>
</tr>
<tr>
<td>Behavioral Intention to Use</td>
<td>I plan to use social media for fundraising in the next 12 months.</td>
<td>.86</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>I predict I will use social media for fundraising in the next 12 months.</td>
<td>.85</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eigenvalues</td>
<td></td>
<td>4.52</td>
<td>1.91</td>
<td></td>
</tr>
<tr>
<td>% of variance</td>
<td></td>
<td>50.23</td>
<td>21.21</td>
<td></td>
</tr>
</tbody>
</table>

Note. Loadings > .30 omitted.

Referring to Table 4-2, the first factor represents both perceived usefulness of social media and behavioral intention to use social media, as the three items measuring perceived usefulness and the two items measuring behavioral intention to use social media loaded on this factor. The
second factor represents perceived ease of use of social media, as all four items loaded on the factor. In short, the results of the factor analysis suggest that a larger concept underlies the variables of perceived usefulness of social media and behavioral intention to use social media. The items measuring these two variables seem similar in that they all explicitly connect social media to fundraising, while the items measuring perceived ease of use do not mention fundraising. Thus, the first factor indexes “perceived ease of use of social media,” while the second factor, which indexed the variables perceived usefulness of social media and behavioral intention to use social media, represents a larger concept, which will be referred to as “cognitions about social media in fundraising.”

**Multiple Regression Using Factor Scores**

When multicollinearity exists among independent predictor variables, conducting multiple regression using factor scores yielded through a factor analysis can overcome limitations of classic multiple regression. Factor scores are “composite measures of each factor computed for each subject” (Hair, 1998, p. 119). They represent the degree to which each respondent scores high on the group of items with high loadings on a factor. Thus, higher values on variables with high loadings on a factor lead to higher factor scores. The key difference between factor scores and summated scales is that the former is computed based on factor loadings of all variables on the factor, whereas the latter is calculated by combining only selected variables. Because factor scores are nearly uncorrelated, or orthogonal, conducting multiple regression using factor scores solves the problem of multicollinearity between predictor variables.

Thus, the study used factor score values for the two factors, “perceived ease of use of social media” and “perceived usefulness of social media/behavioral intention to use social media,” as independent variables in a multiple regression to determine significant factors predicting actual use of social media. The study calculated factor scores for “perceived ease of
use of social media” and “perceived usefulness of social media/behavioral intention to use social media.” Thus, each respondent had two new variables, factor scores for “perceived ease of use of social media” and “perceived usefulness of social media/behavioral intention to use social media,” which were used as predictors in the multiple regression.

Multiple regression was then conducted to determine the best linear combination of the two factor scores, respondent age, size of fundraising staff, perceived donor use of social media and organization use of social media for predicting actual use of social media. This combination of variables significantly predicted actual use of social media, $F(8,37) = 4.22, p < .01$. The beta weights, presented in Table 4-3, show that factor score one, which indexed perceived usefulness of social media and behavioral intention to use social media, fundraisers’ perceived percentage of major donors who use social media and respondents’ age significantly contribute to this prediction. The adjusted $R$ squared value was .48. This indicates that 48% of the variance in social media use was explained by the model.

<table>
<thead>
<tr>
<th>Variable</th>
<th>$B$</th>
<th>$SE_B$</th>
<th>$\beta$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cognitions about Social Media in Fundraising Factor Score</td>
<td>.94</td>
<td>.32</td>
<td>.37**</td>
</tr>
<tr>
<td>Perceived Ease of Use of Social Media Factor Score</td>
<td>.50</td>
<td>.32</td>
<td>.14</td>
</tr>
<tr>
<td>Respondent Age</td>
<td>-.53</td>
<td>.24</td>
<td>-.29*</td>
</tr>
<tr>
<td>Fundraising Staff Size</td>
<td>.29</td>
<td>.18</td>
<td>.19</td>
</tr>
<tr>
<td>Perceived Percentage of All Donors Using Social Media</td>
<td>-.03</td>
<td>.02</td>
<td>-.34</td>
</tr>
<tr>
<td>Perceived Percentage of Individual Donors Using Social Media</td>
<td>-.01</td>
<td>.02</td>
<td>-.12</td>
</tr>
<tr>
<td>Perceived Percentage of Major Donors Using Social Media</td>
<td>.04</td>
<td>.02</td>
<td>.30*</td>
</tr>
<tr>
<td>Organization Use of Social Media</td>
<td>.19</td>
<td>.12</td>
<td>.23</td>
</tr>
<tr>
<td>Constant</td>
<td>4.00</td>
<td>.31</td>
<td>.20***</td>
</tr>
</tbody>
</table>

Note. $R^2 = .48; F(8,37) = 4.22$. * $p > .05$, ** $p > .01$, *** $p > .001$
Thus, the study’s eighth hypothesis was supported. There is evidence that the combination of perceived ease of use, perceived usefulness, behavioral intention to use social media, respondent age, fundraising staff size, organization use of social media and perceived donor use of social media can be used to predict fundraisers’ actual use of social media. Next, the study’s research questions will be answered.

**Reliability Testing of Fundraising Roles Indices**

Before conducting tests to answer the research questions, which utilized the fundraising roles indices, the reliability of the items in each fundraising role scale, technician, liaison, expert prescriber and problem-solving process facilitator, was assessed. Cronbach’s alpha for the items in all scales was positive and greater than .70, suggesting the reliability of each scale is acceptable. The reliabilities for the indices in each of these scales are summarized in Table 4-4.

**Research Question 1**

The first research question asked to what extent respondents predominantly enacted each of the four fundraising roles. Mean scores and standard deviations for the fundraising role indices and items are summarized in Table 4-4. Respondents’ mean scores for each fundraising role index were determined by computing a new variable, which added the respondents’ scores on each item measuring a fundraising role and divided by the number of items measuring that role.

<table>
<thead>
<tr>
<th>Table 4-4. Mean Scores on Indexes Measuring Fundraising Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role and Item</td>
</tr>
<tr>
<td>Technician</td>
</tr>
<tr>
<td>I write fundraising materials on issues and donors.</td>
</tr>
<tr>
<td>I edit fundraising materials written by others.</td>
</tr>
<tr>
<td>I produce brochures, pamphlets, etc.</td>
</tr>
<tr>
<td>I handle technical aspects of producing materials.</td>
</tr>
<tr>
<td>I coordinate photography and graphics.</td>
</tr>
<tr>
<td>I maintain media contacts and place press releases.</td>
</tr>
<tr>
<td>Technician Index</td>
</tr>
<tr>
<td>Cronbach’s alpha</td>
</tr>
</tbody>
</table>
Table 4.4. Continued

<table>
<thead>
<tr>
<th>Role and Item</th>
<th>Mean</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Liaison</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I represent the organization at events and meetings.</td>
<td>5.42</td>
<td>2.92</td>
</tr>
<tr>
<td>I inform management of donor reactions to policies.</td>
<td>6.91</td>
<td>2.06</td>
</tr>
<tr>
<td>I create opportunities for management to hear donors.</td>
<td>6.56</td>
<td>2.40</td>
</tr>
<tr>
<td>I keep the organization informed about media reports.</td>
<td>6.94</td>
<td>2.18</td>
</tr>
<tr>
<td>I report donor opinion survey results to management.</td>
<td>7.57</td>
<td>2.06</td>
</tr>
<tr>
<td>I conduct research to identify problems with donors.</td>
<td>4.70</td>
<td>2.90</td>
</tr>
<tr>
<td><strong>Liaison Index</strong></td>
<td>6.38</td>
<td>1.68</td>
</tr>
<tr>
<td><strong>Cronbach’s alpha</strong></td>
<td>.78</td>
<td></td>
</tr>
<tr>
<td><strong>Expert Prescriber</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I take responsibility for success or failure of fundraising.</td>
<td>6.77</td>
<td>2.32</td>
</tr>
<tr>
<td>Others hold me accountable for fundraising success.</td>
<td>5.23</td>
<td>2.64</td>
</tr>
<tr>
<td>Others consider me the fundraising expert.</td>
<td>7.48</td>
<td>1.82</td>
</tr>
<tr>
<td>I plan actions for pursuing fundraising opportunities.</td>
<td>5.74</td>
<td>2.88</td>
</tr>
<tr>
<td>I make the fundraising policy decisions.</td>
<td>7.31</td>
<td>2.20</td>
</tr>
<tr>
<td>I diagnose and explain fundraising opportunities.</td>
<td>6.10</td>
<td>2.70</td>
</tr>
<tr>
<td><strong>Expert Prescriber Index</strong></td>
<td>6.44</td>
<td>1.80</td>
</tr>
<tr>
<td><strong>Cronbach’s alpha</strong></td>
<td>.83</td>
<td></td>
</tr>
<tr>
<td><strong>Problem-solving Process Facilitator</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I encourage management participation in fundraising decisions.</td>
<td>3.98</td>
<td>2.88</td>
</tr>
<tr>
<td>I emphasize a systematic planning process to management.</td>
<td>7.04</td>
<td>2.00</td>
</tr>
<tr>
<td>I keep management involved in all phases of fundraising.</td>
<td>7.02</td>
<td>2.30</td>
</tr>
<tr>
<td>I outline alternative approaches for pursuing opportunities.</td>
<td>6.61</td>
<td>2.37</td>
</tr>
<tr>
<td>I operate as a catalyst in management’s decision-making.</td>
<td>5.25</td>
<td>2.84</td>
</tr>
<tr>
<td><strong>Problem-solving Process Facilitator Index</strong></td>
<td>6.09</td>
<td>1.82</td>
</tr>
<tr>
<td><strong>Cronbach’s alpha</strong></td>
<td>.78</td>
<td></td>
</tr>
</tbody>
</table>

On average, the study’s respondents predominantly enacted the expert prescriber role ($M = 6.44, SD = 1.80$), followed by the liaison ($M = 6.38, SD = 1.68$), technician ($M = 6.24, SD = 1.66$) and problem-solving process facilitator roles ($M = 6.09, SD = 1.82$). Respondents in the post-hoc analysis also predominantly enacted the expert prescriber role ($M = 6.40, SD = 1.41$), followed by the problem-solving process facilitator ($M = 6.36, SD = 1.39$), liaison ($M = 6.19, SD = 1.20$) and technician roles ($M = 5.58, SD = 1.40$).

These findings are troubling based on Kelly’s (1998a) descriptions of the expert prescriber and problem-solving process facilitator roles. In the prior role, which was enacted
most frequently by this study’s respondents, the fundraiser is viewed as the only individual within the organization with the skill to raise gifts and the responsibility for raising gifts. The fundraiser is isolated from organizational leaders, who do not actively participate in fundraising. This lack of collaboration ultimately hampers the function’s ability to effectively meet organizational needs. This finding is particularly troubling in that most respondents reported they were head of fundraising for their employing organization. When the head of fundraising is isolated from senior management, their ability to plan fundraising programming that effectively addresses organizational needs is compromised.

On the other hand, in the problem-solving process facilitator role, which was enacted least frequently by this study’s respondents, the fundraiser is an active part of the organization’s management team and fundraising is fully integrated into the organization’s operations. The fundraiser collaborates with organizational leaders, who participate in the fundraising process. Fundraising, therefore, is far better equipped to meet organizational needs and is evaluated on the extent to which it does so. Again, the infrequent enactment of this role—particularly by heads of fundraising—raises questions about respondents’ ability to develop effective fundraising programming.

**Research Question 2**

The second research question asked whether the four fundraising roles could appropriately be collapsed into a manager-technician dichotomy. Kelly (1998b) asserted that, as in public relations research, collapsing the four fundraising models into a manager-technician dichotomy may be useful for future research. Following this suggestion, the researcher planned to classify respondents as managers or technicians by comparing their mean scores on each of the four indices. First, however, in order to investigate whether the four fundraising roles should be collapsed into a manager-technician dichotomy, principal axis factor analysis with varimax
rotation was conducted to assess the underlying structure for the items representing the four fundraising roles.

Three factors emerged from the analysis. The first factor accounted for 46.8% of the variance, the second factor accounted for 12.9% of the variance and the third accounted for 4.9% of the variance. Table 4-5 displays the items and factor loadings for the rotated factors. Leech, Barrett and Morgan (2005) noted that factor loadings below the absolute value of .30 are generally considered low, while those equal to or greater than the absolute value of .40 are typically considered high. Therefore, factor loadings less than .30 are omitted from the table to improve clarity.

Table 4-5. Factor Loadings for Three Rotated Factors.

<table>
<thead>
<tr>
<th>Role</th>
<th>Items</th>
<th>Factor Loading</th>
<th>Communality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Technician</td>
<td>Technician 1</td>
<td>.35</td>
<td>.72</td>
</tr>
<tr>
<td></td>
<td>Technician 2</td>
<td>.68</td>
<td>.39</td>
</tr>
<tr>
<td></td>
<td>Technician 3</td>
<td>.79</td>
<td>.33</td>
</tr>
<tr>
<td></td>
<td>Technician 4</td>
<td>.46</td>
<td>.65</td>
</tr>
<tr>
<td></td>
<td>Technician 5</td>
<td></td>
<td>.87</td>
</tr>
<tr>
<td></td>
<td>Technician 6</td>
<td>.89</td>
<td></td>
</tr>
<tr>
<td>Liaison</td>
<td>Liaison 1</td>
<td></td>
<td>.46</td>
</tr>
<tr>
<td></td>
<td>Liaison 2</td>
<td>.42</td>
<td>.68</td>
</tr>
<tr>
<td></td>
<td>Liaison 3</td>
<td>.54</td>
<td>.52</td>
</tr>
<tr>
<td></td>
<td>Liaison 4</td>
<td>.73</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Liaison 5</td>
<td>.68</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Liaison 6</td>
<td></td>
<td>.74</td>
</tr>
<tr>
<td>Expert-Prescriber</td>
<td>Expert 1</td>
<td>.58</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expert 2</td>
<td>.66</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expert 3</td>
<td>.76</td>
<td>.41</td>
</tr>
<tr>
<td></td>
<td>Expert 4</td>
<td>.57</td>
<td>.46</td>
</tr>
<tr>
<td></td>
<td>Expert 5</td>
<td>.87</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expert 6</td>
<td>.60</td>
<td>.39</td>
</tr>
</tbody>
</table>
Referring to Table 4-5, the first and second factors represent all four fundraising roles to some extent as items measuring each role loaded on these factors. The third factor represents all but the expert prescriber role, as items from each of the three other roles loaded on this factor. In short, the results of this factor analysis do not suggest that, as in public relations research, the four fundraising roles can be collapsed into a manager-technician dichotomy. The factor analysis did not suggest that a larger “managerial” concept underlies the three managerial roles, as was discovered in public relations research.

**Advancing Two New Fundraising Roles**

Further statistical tests were conducted to examine how respondents’ mean scores on each of the four fundraising roles compare to each other. Specifically, paired or correlated samples t tests were used to determine whether respondents’ mean scores on the four fundraising scales were significantly different from each other. In short, respondents’ mean scores on the problem-solving process facilitator role were significantly different from their mean scores on the liaison, expert prescriber and technician roles (\(t (136) = 4.14, p < .001\), \(t (137) = -4.61, p < .001\), \(t (137) = -2.95, p < .001\), respectively). Respondents’ mean scores on the expert prescriber scale were
also significantly different from their mean scores on the technician scale, \( t (138) = -2.67, p < .05 \).

This study argues that the results of these tests suggest that the problem-solving process facilitator role is, in fact, conceptually distinct as originally theorized by Kelly (1998a). These findings, however, also suggest the existence of two new fundraising roles, one that blends Kelly’s (1998a) liaison and technician roles and a second that blends the expert prescriber and liaison roles. The study, therefore, argues that a new typology of three roles—problem-solving process facilitator, technician-information collector/deliverer and communication coder—expert prescriber—might better explain the current fundraising behavior of AFP members. These new roles are conceptualized in Chapter 5.

To determine whether respondents primarily enacted the problem-solving process facilitator, technician-information collector/deliverer or communication coder-expert prescriber roles, new mean scores for the last two roles were calculated. To create respondents’ mean scores on the new technician-information collector/deliverer and communication-coder expert prescriber roles, respondents’ mean scores on the original indices for technician and liaison and liaison and expert, respectively, were summed and averaged. A simple comparison of mean scores for each of the three roles then determined which of the three roles respondents predominantly enacted.

Sixty of the present study’s respondents (40.8%) were classified as communication coder-expert prescribers, 40 (27.2%) were classified as problem-solving process facilitators and 28 (19%) were classified as technician-information collector/deliverers. Nineteen respondents (12.9%) could not be classified because the cases were missing data or did not score higher on one role index than the other two indices. For example, many respondents had the same mean
score on two role indices and a lower mean score on the third index. As a result, those respondents could not be classified.

In the post-hoc sample, 192 respondents (28%) were classified as problem-solving process facilitators, 22 (3%) were classified as communication coder-expert prescribers and 12 (1.7%) were classified as technician-information collector/deliverers. Approximately 70% of the post-hoc sample could not be classified due to missing data or lack of a highest mean score.

The study’s respondents primarily enacted the communication coder–expert prescriber role ($M = 6.42, SD = 1.64$), followed by the technician-information collector/deliverer ($M = 6.34, SD = 1.58$) and problem-solving process facilitator roles ($M = 5.99, SD = 1.82$). The post-hoc sample also primarily enacted the communication coder–expert prescriber role ($M = 6.53, SD = 1.14$), but enacted the problem-solving process facilitator role more than the technician-information collector/deliverer role ($M = 6.36, SD = 1.39, M = 6.03, SD = 1.20$, respectively).

**Reliability Testing of Indices of Application of Social Media to Fundraising Process**

As discussed in Chapter 3, the study included indices of measures to evaluate fundraisers’ use of social media in the research, programming and stewardship steps of the fundraising process.

Before conducting tests to answer the first research question, the reliability of the items in the research, programming (divided into cultivation and solicitation) and stewardship (divided into reciprocity, responsibility, reporting and relationship-nurturing) scales was assessed. The reliability of the items in these scales was positive and equal to or greater than .70, which suggests the reliability of each scale is acceptable.

**Research Question 3**

As discussed previously, only respondents who reported they were currently using social media in their personal work completed the questionnaire section measuring application of social
media to the fundraising process. All other respondents were redirected to the fundraising roles section. Of the study’s 147 respondents, only 57, or 42%, completed the section measuring application of social media to the fundraising process.

Descriptive statistics were conducted to determine for which steps of the fundraising process respondents most agree and disagree they use social media. Respondents evaluated all items in the indices of application of social media to the fundraising process on a nine-point Likert scale, where one equaled strongly disagree and nine equaled strongly agree.

Looking at mean scores on the indices, respondents most agreed they used social media for programming ($M = 5.78, SD = 1.79$), followed by stewardship ($M = 5.0, SD = 1.83$) and research ($M = 4.82, SD = 2.26$). Table 4.5 summarizes mean scores on the indices of application of social media to steps of the fundraising process.

Table 4.6. Mean Scores on Items and Indexes Measuring Steps of Fundraising Process (N = 57)

<table>
<thead>
<tr>
<th>Step and Item</th>
<th>$M$</th>
<th>$SD$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I track social media to learn public opinion of our organization.</td>
<td>5.11</td>
<td>2.71</td>
</tr>
<tr>
<td>I use social media to identify key individuals who are talking and posting about our organization.</td>
<td>5.08</td>
<td>2.62</td>
</tr>
<tr>
<td>I track social media to find conversations about our organization.</td>
<td>4.66</td>
<td>2.52</td>
</tr>
<tr>
<td>I track our competitors using social media.</td>
<td>4.51</td>
<td>2.66</td>
</tr>
<tr>
<td>Research Index</td>
<td>4.82</td>
<td>2.26</td>
</tr>
<tr>
<td>Cronbach’s alpha</td>
<td>.88</td>
<td></td>
</tr>
<tr>
<td>Programming</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I use social media to inform donors and potential donors about our organization. (cultivation)</td>
<td>7.00</td>
<td>2.08</td>
</tr>
<tr>
<td>I use social media to correct rumors and inaccurate information about our organization. (cultivation)</td>
<td>7.00</td>
<td>2.15</td>
</tr>
<tr>
<td>I use social media to request donations. (solicitation)</td>
<td>5.00</td>
<td>2.83</td>
</tr>
<tr>
<td>I use social media to obtain pledges from donors. (solicitation)</td>
<td>5.00</td>
<td>2.74</td>
</tr>
<tr>
<td>Programming Index</td>
<td>5.78</td>
<td>1.79</td>
</tr>
<tr>
<td>Cronbach’s alpha</td>
<td>.70</td>
<td></td>
</tr>
</tbody>
</table>
Table 4-6. Continued.

<table>
<thead>
<tr>
<th>Step and Item</th>
<th>M</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stewardship</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I use social media to ensure donors their contributions are appreciated. (reciprocity)</td>
<td>4.44</td>
<td>2.63</td>
</tr>
<tr>
<td>I use social media to ensure donors we adhere to the highest ethical standards. (responsibility)</td>
<td>4.25</td>
<td>2.66</td>
</tr>
<tr>
<td>I use social media to tell donors how the organization has used their gifts. (reporting)</td>
<td>4.61</td>
<td>2.60</td>
</tr>
<tr>
<td>I use social media to encourage donor involvement. (relationship-nurturing)</td>
<td>6.42</td>
<td>1.90</td>
</tr>
<tr>
<td><strong>Stewardship Index</strong></td>
<td>5.00</td>
<td>1.83</td>
</tr>
<tr>
<td><strong>Cronbach’s alpha</strong></td>
<td>.72</td>
<td></td>
</tr>
</tbody>
</table>

Within research, respondents most strongly agreed they used social media to track public opinion of the organization ($M = 5.11, SD = 2.71$). Respondents neither agreed nor disagreed that they use social media to track the organization’s competitors ($M = 4.51, SD = 2.66$).

Turning to programming, respondents most strongly agreed that they use social media to inform donors and potential donors about the organization ($M = 7.0, SD = 2.08$) and to correct rumors and inaccurate information about the organization ($M = 7.0, SD = 2.15$). Respondents reported very slight agreement that they use social media to request donations ($M = 5.0, SD = 2.83$) and obtain pledges ($M = 5.0, SD = 2.74$). Finally, with regard to stewardship, respondents most strongly agreed that they use social media to encourage donor involvement ($M = 6.42, SD = 1.90$). Respondents disagreed that they use social media to assure donors that their contributions are appreciated ($M = 4.44, SD = 2.63$) and that the organization adheres to the highest ethical standards ($M = 4.25, SD = 2.66$).

As in the initial analysis, respondents included in the post-hoc analysis least strongly agreed that they apply social media to the research step of the fundraising process ($M = 4.71, SD = 2.23$). Unlike respondents in the scientific sample, respondents in the post-hoc analysis more strongly agreed that they apply social media to the stewardship step of the fundraising process.
than to the programming step ($M = 5.16, SD = 1.34, M = 5.15, SD = 1.36$, respectively), though the difference was very slight.

While respondents in the scientific sample most strongly agreed to using social media to track public opinion of the organization, respondents in the post-hoc analysis most strongly agreed they use social media to find conversations about the organization ($M = 5.06, SD = 2.80$), followed by to track public opinion of the organization ($M = 4.93, SD = 2.73$). Similar to the scientific sample, respondents disagreed that they use social media to track their competitors ($M = 4.11, SD = 2.65$). Turning to programming, respondents most strongly agreed they use social media to inform donors and potential donors about the organization ($M = 6.00, SD = 1.93$) and to request donations ($M = 5.16, SD = 2.02$). Unlike the scientific sample, post-hoc respondents neither agreed nor disagreed that they use social media to correct rumors and inaccurate information about the organization ($M = 4.53, SD = 2.07$) and to obtain pledges from donors ($M = 4.60, SD = 1.95$).

Finally, looking at stewardship, respondents in the post-hoc analysis, on average, most strongly agreed they use social media to encourage donor involvement ($M = 5.85, SD = 1.71$). Unlike fundraisers in the probability sample, the post-hoc group slightly agreed that they use social media to assure donors their contributions are appreciated ($M = 4.89, SD = 1.97$) and to assure donors the organization adheres to the highest ethical standards ($M = 4.81, SD = 1.91$). This group also slightly agreed they apply social media to tell donors how the organization has used their gifts ($M = 4.80, SD = 1.91$).

In short, respondents most strongly agreed that they use social media for programming and slightly agreed that they use social media for stewardship and research. Respondents reported most strongly agreeing that they use social media to inform donors and potential donors about
the organization, to correct rumors and inaccurate information about the organization and to encourage donor involvement, respectively. With a few slight differences, the results of the post-hoc analysis largely confirmed results of the initial analysis.

Research Question 4

In order to learn whether problem-solving process facilitators, technician-information collector/deliverers and communication coder–expert prescribers apply social media to the steps of the fundraising process differently, mean scores on the indices for application of social media to research, programming and stewardship were compared. An initial comparison of mean scores showed fundraising practitioners predominantly enacting each of the three roles do differ on the extent to which they agree they apply social media to each step of the fundraising process. Problem-solving process facilitators most agreed they applied social media to the programming step of the fundraising process ($M = 5.25, SD = 1.67$). Problem-solving process facilitators felt neutral about their application of social media to the research and stewardship steps of the fundraising process ($M = 4.25, SD = 2.62, M = 4.31, SD = 1.67$, respectively). In other words, they neither agreed nor disagreed that they apply social media to these steps of the fundraising process. Communication coder–expert prescribers most agreed they applied social media to the programming step of the fundraising process ($M = 6.48, SD = 1.64$), followed by stewardship ($M = 5.51, SD = 1.58$) and research ($M = 5.45, SD = 2.14$). Finally, technician-information collector/deliverers most agreed they applied social media to the programming step of the fundraising process ($M = 5.81, SD = 2.56$). Technician-information collector/deliverers disagreed that they applied social media to the research and stewardship steps of the fundraising process ($M = 3.63, SD = 1.92, M = 3.70, SD = 2.22$, respectively). As was discussed previously, only respondents who reported they were currently using social media on the job completed the section exploring application of social media to the fundraising process. Only respondents who
completed that survey section, therefore, are included in this analysis. These findings are reported in Table 4-7.

Table 4-7. Mean Scores on Indices of Application of Social Media to the Research, Programming and Stewardship Steps of the Fundraising Process by Fundraising Role.

<table>
<thead>
<tr>
<th>Fundraising Role</th>
<th>Research</th>
<th></th>
<th>Programming</th>
<th></th>
<th>Stewardship</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>M</td>
<td>SD</td>
<td>M</td>
<td>SD</td>
<td>M</td>
</tr>
<tr>
<td>Problem-solving Process Facilitator</td>
<td>15</td>
<td>4.25</td>
<td>2.62</td>
<td>5.25</td>
<td>1.67</td>
<td>4.31</td>
</tr>
<tr>
<td>Technician-information collector/deliverer</td>
<td>29</td>
<td>3.63</td>
<td>1.92</td>
<td>5.81</td>
<td>2.56</td>
<td>3.70</td>
</tr>
<tr>
<td>Communication coder–expert prescriber</td>
<td>4</td>
<td>5.45</td>
<td>2.14</td>
<td>6.48</td>
<td>1.64</td>
<td>5.51</td>
</tr>
<tr>
<td>Total</td>
<td>48</td>
<td>4.92</td>
<td>2.34</td>
<td>6.04</td>
<td>1.78</td>
<td>4.95</td>
</tr>
</tbody>
</table>

Although there appears to be differences in how the three groups report applying social media to the fundraising process, it was necessary to further examine the data by conducting one-way ANOVAs. After conducting the one-way ANOVAs, the null hypothesis of no statistical difference between the means of the groups was not rejected for the tests using mean scores on indices of application of social media to the programming and research steps of the fundraising process. The difference between problem-solving process facilitators, technician-information collector/deliverers and communication coder–expert prescribers on the indices of application of social media to the programming and research steps of the fundraising process were not statistically significant ($p = .09$, $p = .13$, respectively). In short, it is possible the mean scores of these groups are approximately the same.

For the one-way ANOVA using mean score on the index of application of social media to the stewardship step of the fundraising process, the null hypothesis of no statistical difference between the means of the groups was rejected. A statistically significant difference was found among the three groups on application of social media to the stewardship step of the fundraising
process, $F(2, 47) = 4.17, p < .05$. Problem-solving process facilitators’ mean score on this index was 4.31, while the mean score for technician-information collector/deliverers and communication coder–expert prescribers were 3.70 and 5.51, respectively. These findings are summarized in Table 4-8.

To better understand the variation in application of social media to the research, programming and stewardship steps of the fundraising process across fundraising roles, post hoc Tukey HSD (honestly significant differences) Tests were conducted. Tukey Tests were not significant for any pairs of means. Because Tukey HSD is a conservative test which attempts to control the overall alpha level, it is possible that even when the overall $F$ is significant, Tukey Tests comparing all group means will not be significant for any pair of means (Morgan et al., 2004).

<table>
<thead>
<tr>
<th>Step</th>
<th>Df</th>
<th>SS</th>
<th>MS</th>
<th>F</th>
<th>p</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>2</td>
<td>22.32</td>
<td>11.16</td>
<td>2.13</td>
<td>.131</td>
</tr>
<tr>
<td>Programming</td>
<td>2</td>
<td>15.25</td>
<td>7.63</td>
<td>2.56</td>
<td>.089</td>
</tr>
<tr>
<td>Stewardship</td>
<td>2</td>
<td>23.36</td>
<td>11.68</td>
<td>4.17*</td>
<td>.022</td>
</tr>
</tbody>
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* $p < .05$.

In short, predominant role does not seem to be a useful framework for understanding fundraisers’ application of social media to the research and programming steps of the fundraising process. Predominant role, however, is a useful framework for understanding fundraising practitioners’ application of social media to the stewardship step of the fundraising process.
CHAPTER 5
CONCLUSIONS

This study accomplished several important goals. First, it described the extent to which AFP members predominantly enact each of the four fundraising roles, demonstrated these roles cannot appropriately be collapsed into a manager-technician dichotomy and suggested a three-role typology might better explain the current fundraising behavior of AFP members. Second the study presented, and tested, a theory of social media use in fundraising. Although the study found that most AFP members are not currently using social media in their work, the study’s findings demonstrate that AFP members are beginning to apply social media to their work in the way described by the theory of social media use in fundraising. Moreover, the study demonstrates that the model consisting of the TAM predictor variables, perceived donor use of social media, organization use of social media, fundraisers’ ages and the size of the fundraising department significantly predicts fundraisers’ use of social media. Figure 5-1 summarizes the study’s findings related to the theory of social media use in fundraising. Importantly, the study’s findings suggest that AFP members may underestimate the extent to which their donor publics use social media.

Fundraisers’ Perceptions of Social Media, Behavioral Intention to Use Social Media and Use of Social Media

Several of the study’s hypotheses proposed that the Technology Acceptance Model (TAM), presented by Davis (1986, 1989) to explain individuals’ use of new technology, could be applied to predict fundraising practitioners’ application of social media to their work. Based on this theory, fundraisers’ actual use of social media in their work is a function of their behavioral intention to use social media in fundraising. A fundraiser’s behavioral intention to use social media in fundraising is determined by a combination of how useful the fundraiser perceives
social media to be in fundraising and how easy they perceive social media is to use. The former is seen as being directly impacted by the latter.

Overall, AFP fundraisers believe that social media are, or would be, fairly easy to use. This finding was somewhat surprising since the majority of AFP fundraisers do not personally use social media in their fundraising jobs; thus, they have little professional experience with

Note. $R^2 = .48; F(8,37) = 4.22$

+ = positive correlation between variables
= variables not significantly correlated

Figure 5-1 Revised Theory of Social Media Use in Fundraising

Overall, AFP fundraisers believe that social media are, or would be, fairly easy to use.
applying social media to fundraising. Moreover, AFP fundraisers’ organizations rarely use social media for fundraising. This finding, however, does not mean organizations represented in AFP do not apply social media at all for communication activities. On the contrary, it could simply indicate AFP members’ organizations rarely use this technology for fundraising. NTEN (2009) reported that marketing departments organize charitable organizations’ presence on social media far more frequently than fundraisers do. Thus, it is possible AFP members have been exposed to social media through its application by another communication function within their organizations.

It should be noted, however, that these perceived ease of use items actually measure ease of use two ways: by asking nonusers to estimate how easy it would be to use social media and by asking current users to report how easy it is for them to use social media. This was necessary in order to include both users and nonusers in the study’s sample. The latter mode of questioning, however, is based on actual experience with social media, while the former involves evaluating what an individual has learned or observed about social media from his or her environment.

It is possible, since many AFP members reported they do not use social media in their jobs and that their organization rarely uses social media for fundraising, that AFP members’ perception of social media as easy to use stems from personal, as opposed to professional, experience with these technologies. The study focused on respondents’ perceptions and use of social media in their careers and did not intend to collect data about respondents’ perceptions toward using social media in their personal time and actual use of social media in their personal time. In fact, respondents were explicitly asked to evaluate social media for use in their
professional, not personal, life and to report on their use of social media in their professional life only.

As reviewed in Chapter 2, many communication professionals incorrectly assume that digital and social media are exclusively the domain of the very young and, therefore, rely on traditional media to reach older generations of Americans. In reality, older generations of Americans are steadily gaining ground in terms of use of digital and social media (Pew, 2008). Although conventional wisdom may suggest this relatively mature group of AFP members has little personal experience with social media—about 60% of respondents were aged 45 or older, and only 18% were under 35—research shows these age groups do have some experience with social media. The perception of social media as easy to use is, therefore, likely based on private experience with social media for those respondents who use social media in their personal time. Future studies might consider exploring how use of social media in one’s personal life relates to use of social media on the job.

Those not currently using social media on the job, however, may develop a perception of social media as easy to use based on learning about social media from peers, colleagues (including those in other organizational communication functions) or other professional sources. As discussed in Chapter 2, a review of mainstream media and the Web sites of relevant professional groups reveals social media are currently a topic of interest and that practitioners are engaged in discussion about how social media can be applied to professional communication. During the Summer of 2009, the Nonprofit Technology Network held the first workshop to help nonprofits learn to use social media in their communications efforts. Exposure to these discussions will naturally contribute to fundraisers’ perceptions of how easy social media are to use, even if they have not actually begun using social media themselves. It is also possible,
however, that the prominence of this topic might encourage respondents to exaggerate their perceived comfort level with social media in order to appear versed in these technologies. In short, the study’s TAM findings show that AFP members believe social media are easy to use and slightly believe social media are, or would be useful in their fundraising work.

The latter finding was not surprising given AFP members’ perceptions of how frequently their donor publics use social media to communicate. About 15% of AFP members were unsure, or could not estimate, what percent of three donor publics—all donors (including corporations and foundations), individual donors and major donors—use social media on a weekly basis. About 4% of AFP members thought that none of their donors use social media. Very few members reported thinking that over half of each donor public use social media. Given these numbers, it is not surprising AFP fundraisers do not perceive social media as particularly useful in their fundraising jobs. AFP members are likely still weighing the potential pros and cons of applying social media to their work.

As predicted by the theory of social media use in fundraising, AFP members’ estimates of the percentage of each of the three groupings of donor publics—all donors (including corporations and foundations), individual donors and major donors—that use social media weekly were positively correlated with their behavioral intention to use social media in fundraising. In short, the higher percentage of their donors a fundraiser thinks uses social media on a weekly basis, the higher their behavioral intention to use social media in fundraising. Based on the discussion of Americans’ use of digital and social media presented in Chapter 2, however, AFP members likely may be underestimating the extent to which their donor publics use social media. The weakest positive correlation was between fundraisers’ estimate of the percentage of major donors that use social media weekly and their behavioral intention to use social media in
fundraising. This finding likely reflects fundraisers’ assumption that major donors, who are often older individuals, use social media less frequently than younger generations of Americans. If fundraisers estimated that more of their donor publics used social media, they would likely report higher behavioral intention to use social media in their work.

Practitioners’ ambivalent views of the usefulness of social media could also indicate that practitioner literature has not yet clearly articulated what social media mean for fundraisers and exactly how fundraisers should be using social media in their work. As discussed in the literature review, some work has attempted to describe the extent of use of social media, but no real “how-to” literature has yet discussed the actual usefulness of social media and, specifically, how practitioners should be using these technologies in their work. This could be contributing to the somewhat low evaluation of usefulness of social media.

AFP fundraisers reported fairly high intention to use social media, but low actual use of social media. Again, reported high intention to use social media could be due to fundraisers’ desire to be socially acceptable in relation to their peers (i.e., to appear current with trends in the fundraising field). Respondents’ behavioral intention to use social media, once again, was related to their perceptions of donor publics’ use of social media. Correlations revealed statistically significant positive relationships between fundraisers’ estimate of the percentage of the three groupings of donor publics that use social media weekly and their behavioral intention to use social media in fundraising. In short, the more fundraisers perceive their donor publics use social media, the higher their behavioral intention to use social media in fundraising.

**Relationships between Fundraisers’ Perceptions of and Use of Social Media**

The study’s first, second (divided into parts “a” and “b”) and third hypotheses proposed positive relationships between the TAM variables. All hypotheses were supported, as predicted by TAM. Bi-variate, or simple linear, regression conducted on the pairs of variables also
supported the causal relationships between the variable pairs predicted by the TAM. These findings suggest that, considered individually, the perception that social media would be useful in fundraising is more strongly related to forming a behavioral intention to use social media in fundraising than is the perception that social media are easy to use. This finding makes sense based on the scholarly and practitioner literature on public relations, including fundraising, which encourages practitioners to thoughtfully select a mode of message delivery based on understanding how appropriate that choice is to the specific communication situation and publics. Thus, one would expect perceived usefulness to be more strongly correlated than perceived ease of use with behavioral intention to use social media in fundraising.

Looking beyond correlations, simple linear regression confirmed that practitioners’ perceived usefulness of social media has a much stronger effect on their intention to use social media in their work than does their perception of how easy social media is to use. This lends credence to the idea that fundraisers are strategic communicators who thoughtfully select modes of message delivery based on their appropriateness to the specific situation. Given that the majority of responding AFP members were heads of fundraising and staff senior managers, it is not surprising they evaluated social media on a strategic level.

AFP members’ perceived ease of use, however, was positively related to perceived usefulness of social media, indicating the easier fundraisers perceive social media are to use, the more useful they consider social media to be in their jobs. Simple linear regression confirmed fundraisers’ perceptions of how easy social media are to use help predict how useful they consider social media to be in their jobs. In short, perceived ease of use indirectly impacts fundraisers’ behavioral intention to use social media by contributing to perceived usefulness of social media.
Based on TAM’s predictions, it is somewhat surprising that fundraisers’ behavioral intention to use social media did not correlate more strongly with actual use of social media ($r = .26$). According to Cohen (1988), the effect size is typical for behavioral science. The TAM, however, like its precursor, the TRA, assumes that once the intention to act has been formed, the actor will be free to do so without limitation. In reality, many individual and organizational variables constrain freedom to act.

Respondents in the Nonprofit Technology Network’s (2009) recent survey of charitable organizations’ use of social networking sites such as MySpace and Facebook, for example, reported that lack of technical expertise and budgetary constraints are barriers to integration of social networking into their communications efforts. In general, the present study’s respondents reported working for small fundraising departments, employing ten or fewer full-time fundraisers, so human resources would likely be a barrier to integrating social media into fundraising. Lack of organizational support for such initiatives might also hinder integration of social media into an organization’s communication efforts. Goodman (2006) explains that the CEOs of Fortune 500 companies polled in the Makovsky 2006 Corporate Blogging Study did not perceive blogs to be valuable communication tools. Though the relationship was not directly explored, CEOs also reported their organizations rarely used blogs as communication tools. Thus, management might intervene to prevent employees from integrating social media into programming, whether by communicating their lack of support for such initiatives or through failure to provide necessary resources.

The present study viewed two of these potential barriers—organization use of social media for fundraising and fundraising department size—as predicting behavioral intention to use social media in fundraising. The former was positively and significantly correlated with fundraisers’
behavioral intention to use social media in fundraising while the relationship between fundraising department size and behavioral intention to use social media in fundraising was not significant. In contrast to the present study, these barriers could also be viewed as intervening variables between behavioral intention to use social media and actual use of social media on the job. Future studies might explore how these types of barriers intervene to prevent fundraisers who intend to use social media in their work from actually doing so.

Due to the high correlation between perceived usefulness and behavioral intention to use, which indicates the presence of multicollinearity, a factor analysis was conducted to examine the underlying structure of the items representing TAM’s three predictor variables. That factor analysis revealed two factors that indexed perceived ease of use and behavioral intention to use social media/perceived usefulness of social media, respectively. This provides evidence that a larger concept may be underlying the items used to measure these two variables of perceived usefulness of social media and behavioral intention to use social media. Further studies might explore the possibility of a concept underlying these two variables.

Multiple regression was then conducted using factor scores for the two factors—which were named “perceived ease of use of social media” and “cognitions about social media in fundraising,” respectively, perceived donor use of social media, organization use of social media, fundraisers’ ages and size of the fundraising department as independent variables predicting fundraisers’ use of social media. When all predictors were included, the overall model did significantly predict fundraising practitioners’ use of social media on the job, though only perceived ease of use, perceived usefulness, fundraisers’ ages and perceived percentage of major donors using social media were significantly contributing to the prediction of social media use.
In short, this study further validated the theory of social media use in fundraising by demonstrating it does, to some degree, explain why fundraisers use social media in their work.

**Applying Social Media to the Fundraising Process**

To summarize, the study worked inductively from practitioner and scholarly literature, as well as adapted measures developed by other scholars, to create a scale to measure how social media can be effectively applied to the research, programming and stewardship steps of the fundraising process. As argued earlier, practitioners cannot effectively apply social media to the objective-setting step of the fundraising process, the step following research in which objectives are set to guide fundraising programming, and the evaluation step of the fundraising process. Evaluation occurs before programming to ensure program success, during programming to check progress towards objectives and after a fundraising program’s conclusion to determine whether program objectives were met and identify areas for future improvement (Kelly, 1998a).

Application of social media to the research, programming and stewardship steps of the fundraising process was operationalized with 12 items, four for each step, expressing how that step of the fundraising process is carried out using social media. Eight items were original to this study, and the present study adapted stewardship items developed by Waters (2007b) and later revised by Dell (2009) to measure the extent to which stewardship is carried out using social media. Since a nine-point Likert scale was used, mean scores of approximately 4.50 on items and indices indicate fundraisers were neutral, neither agreed nor disagreed, that they used social media in the way described by the item. As discussed in Chapter 4, reliabilities for the indices of application of social media to steps in the fundraising process were generally high, providing strong support for the reliability of the scales. These findings suggest the items in each scale successfully captured the concepts they were intended to operationalize.
Validation of the Scale of Application of Social Media to the Fundraising Process

Moreover, this scale was largely validated in the study. For example, it was determined the items do explain how fundraisers apply social media to the fundraising process. Fundraisers, overall, expressed at least slight agreement with most of the items. One exception was the research item, “I track our competitors using social media.” The lack of agreement with the item may be because AFP members did not relate to the term “competitors.” The term was used in the study to mean organizations with similar missions, which may be either for-profit or non profit organizations. Much scholarly and practitioner literature has argued that charitable organizations must behave more like businesses, because they compete with other organizations for funding, including donor dollars, and clients. It is possible, however, that respondents reacted negatively to the term competitors. Future studies should replace the term competitors with one that will be more acceptable to fundraisers, such as “similar organizations.”

Fundraisers also disagreed that they use social media to assure donors their contributions are appreciated and to assure donors the organization adheres to the highest ethical standards, both of which operationalized stewardship. These findings are not surprising since AFP fundraisers expressed only slight agreement that they use social media to request donations and pledges. If AFP fundraisers are not currently obtaining gifts online, it makes sense that they are not yet employing social media for stewardship. As organizations represented in AFP increase their application of social media to the solicitation element of programming, these items will likely be validated.

Use of Social Media in the Fundraising Process

Again, AFP members agreed that they incorporate social media, albeit to a modest degree, in the research, programming and stewardship steps of the fundraising process. AFP fundraisers
most agreed that they apply social media to programming ($M = 5.78, SD = 1.79$), followed by stewardship ($M = 5.00, SD = 1.83$) and research ($M = 4.82, SD = 2.26$).

The results of this study suggest members of AFP primarily are using social media as a means of communicating with current and potential donors. Looking at individual items, fundraisers most strongly agreed they use social media to inform donors and potential donors about the organization, to correct rumors and inaccurate information about the organization and to encourage donor involvement. The first two items operationalized programming and the last item operationalized stewardship. The results suggest fundraisers are using social media much less to request donations and pledges, as discussed previously. These findings are not surprising in that AFP has reported that social media are far more useful as a means of communicating with, and developing relationships with, current and potential donors than as a means of actually obtaining donations. It is also likely fundraisers believe social media users are too young to be a likely source of significant donations.

Although AFP members most strongly agreed they use social media as a vehicle for message delivery, fundraisers do, to some extent, recognize the potential of social media for the managerial, strategic aspects of fundraising, particularly in conducting research. AFP members slightly agree they use social media to learn public opinion of the organization, identify key individuals who are talking or posting about the organization and to locate conversations about the organization.

In short, though the study found modest application of social media to the fundraising process, findings indicate AFP members are beginning to apply social media to the programming, research and stewardship steps of the fundraising process. Although only approximately 40% of the present study’s respondents reported they were currently applying
social media to their work, these findings complement what the *Chronicle of Philanthropy* found in its most recent online giving study. That study revealed approximately 40% of the “Philanthropy 400”, a list of top fundraising American charities, had experimented with new technology, including social media, as part of their online fundraising efforts. Moreover, the *Chronicle* reported that in the few years it had been tracking that group’s application of new technology to fundraising, the Philanthropy 400’s reported application of new media to fundraising had slowly, but steadily, increased. In that the rest of the sector looks to the Philanthropy 400 to model best practices and pioneer new fundraising techniques, it is likely the other nonprofit organizations will also increase their application of social media to fundraising over time.

The *Chronicle*’s study, however, simply asked respondents whether or not they were using new media in fundraising and did not collect any detailed information about how these charities are applying social media to the fundraising process. The study provided the first baseline data of application of social media to the fundraising process in American charities. As fundraisers increasingly apply social media to their work, it is critical that they be informed as to how social media can effectively be integrated into the fundraising process, which the study articulated through developing a scale of application of social media to the fundraising process. Though AFP members expressed only modest agreement, or even disagreement, that they apply social media in some of the ways described by the scale, it is likely this behavior will continue to increase over time. This original scale, therefore, serves as a roadmap to guide practitioner behavior by articulating how social media can be effectively applied to both the technical and managerial aspects of fundraising.
**Fundraising Roles**

To summarize, the present study evaluated AFP members on Kelly’s (1998a) indices of fundraising roles items. The findings of this study demonstrate that the reliabilities of those indices are acceptable. AFP fundraisers primarily enact the expert-prescriber role, followed by the liaison, technician and problem-solving process facilitator roles.

It was troubling to observe that the problem-solving process facilitator role was enacted least frequently. Waters, Kelly and Walker (2008) explained that the problem-solving process facilitator role is critical to organizational success. In this role, fundraisers are part of organizations’ management teams and play a key role in decision-making on organization-wide problems. Fundraisers manage the involvement of organization leaders in the fundraising process. In contrast, fundraisers predominantly enacting the expert prescriber role are viewed as the only individuals in the organization responsible for fundraising. Fundraisers are isolated from organizational leadership, which hampers their ability to create fundraising programs that effectively address an organization’s needs.

Waters, Kelly and Walker’s (2008) study of fundraisers found that the expert prescriber role was enacted predominantly, followed by the problem-solving process facilitator role, the liaison role and the technician role. The authors argued that their finding that the study’s respondents most frequently enacted managerial roles was not surprising in that their sample was comprised primarily of fundraising leadership. Similarly, based on demographic data, the present study’s sample was also comprised of senior fundraising practitioners, while entry-level practitioners were not well represented. This makes the finding that the problem-solving process facilitator role was practiced least frequently even more troubling in terms of the potential contribution of the represented fundraising departments to organizational effectiveness. When those who identify themselves as senior fundraising practitioners are not part of charitable
organizations’ management teams, the fundraising staff’s ability to contribute to organizational success is comprised.

On the other hand, the technical expertise demonstrated by AFP members is a valuable component of effective fundraising. Gordon and Kelly (1999) discussed the technician role as a critical base for effective public relations. Technical work is necessary to carry out the fundraising programs planned by fundraising management. Waters, Kelly and Walker (2008), however, warned that problems will arise when a fundraising department is comprised solely of technicians. These fundraisers simply carry out decisions made by others and generally possess limited understanding of the purpose of their work. A department comprised solely of technicians will not effectively contribute to the organization’s goals and mission.

Revising Fundraising Roles

Subsequent factor analysis of the roles indices, however, suggested that Kelly’s (1998a) items do not actually capture the four concepts they were originally intended to index, the four fundraising roles. Moreover, the analysis indicated there is not a larger managerial concept underlying the three managerial roles as was found in public relations research. Thus, the findings of this study do not suggest it would be fruitful to collapse the four fundraising roles into a manager-technician dichotomy, as was deemed appropriate in public relations research.

As was discussed in Chapter 4, paired sample t-tests suggest that the problem-solving process facilitator role is distinct as originally conceptualized by Kelly (1998a). Respondents’ mean scores on that index were statistically different from their mean scores on the technician, liaison and expert prescriber indices. It was also found that respondents’ mean scores on the technician index were statistically different than their mean scores on the expert prescriber index but not on the liaison index. These findings, in short, indicate that a three-role typology—problem-solving process facilitator, technician-information collector/deliverer and
communication coder–expert prescriber—may better explain the current fundraising behavior of AFP members. The latter two roles represent a blending of three of Kelly’s (1998a) original roles.

In the technician-information collector/deliverer role, the fundraiser would be responsible for the technical work of producing and disseminating messages from the organization to donor publics, but would also work to facilitate communication between donor publics and the organization. As was discussed in Chapter 2, fundraisers who predominantly enact the technician role do not actually participate in planning fundraising programs. On the contrary, they produce the techniques, or tactics, required for programs planned by senior fundraising practitioners. As technician-information collector/deliverers, therefore, fundraisers would likely serve as information collectors or investigators, communicating with donor publics then fully reporting the results of these interactions to senior fundraising managers. The latter group might analyze the results of interactions with donor publics and choose to have technician-information collector/deliverers communicate further with donor publics to collect more information on any issues or opportunities identified in the interaction.

Ultimately, however, senior fundraising managers would use the information collected by technician-information collector/deliverers to shape fundraising programs, without input from the technician-information collector/deliverers. Technician-information collector/deliverers are simply responsible for reporting the results of interactions with donor publics, not for determining which parts of those interactions are relevant to planning fundraising programs or for participating in strategic planning. Thus, the technician-information collector/deliverer role simply adds another non-managerial task to the traditional technician role. Technician-information collector/deliverers are not directly involved in strategic planning, though they
supply information that might be used in strategic planning. Of course, technician-information collector/deliverers’ activities can only enhance fundraising success if at least one member of the fundraising staff engages in strategic planning, whether in isolation from the organization’s senior management or not.

This role seems particularly relevant when fundraisers are applying social media to the programming and stewardship steps of the fundraising process. Both of these steps involve developing and transmitting messages from the organization to donor publics. Because of the interactive, two-way nature of social media, however, messages distributed using these new technologies will often result in rapid feedback from donor publics. Thus, the technician may act as a representative of the organization when he or she receives and responds to this feedback.

In the communication coder–expert prescriber role, the fundraiser would facilitate communication between the organization and donor publics, but also be the individual who diagnoses and determines the solutions to fundraising issues. This differs from the technician-information collector/deliverer role in that the fundraiser behaves differently when communicating with donor publics. When communicating with donor publics, the fundraiser is not serving simply as an information collector or investigator who fully reports on the interaction. On the contrary, the fundraiser is simultaneously engaging in a mental process of “coding” interactions with target publics to identify information important for fundraising planning, such as donor publics’ perceptions of the organization and any potential fundraising issues or opportunities. In real-time, the fundraiser may hone in on a piece of important information and further interact with the donor public about that topic. Although it is certainly not ideal that communication coder–expert prescribers plan fundraising programming in isolation from senior management, since the involvement of senior management ensures fundraising
programs appropriately support organizational goals and objectives, the information gained through interaction with donor publics would improve fundraising programming.

For example, when conducting a meeting with several major donors, a senior fundraising practitioner might realize that major donors do not think that one of the charitable organization’s programs relates appropriately to the organization’s mission. Realizing these perceptions are important to fundraising success, particularly for the program in question, a communication coder–expert prescriber might engage the major donors in further dialogue on this topic in order to understand major donors’ perceptions on this topic and how they receive information about the topic. A communication coder–expert prescriber understands this information could be used to plan a fundraising program that will improve understanding of how the program supports the organization’s mission, ultimately enhancing fundraising success.

In short, the present study’s findings suggest that the new three-role typology presented in this study—problem-solving process facilitator, technician-information collector/deliverer and communication coder–expert prescriber—better describes the current fundraising behavior of AFP members than do Kelly’s (1998a) four fundraising roles. Although technician-information collector/deliverers are not directly involved in strategic planning, the information they gather might enhance strategic planning. Similarly, interactions with donor publics might empower communication coder–expert prescribers to plan more effective fundraising programs.

Using Roles Theory to Understand Fundraisers’ Use of Social Media

This discussion now turns to the study’s fourth research question, which generally explored whether fundraising roles theory was a useful framework for understanding how practitioners use social media on the job.

Simple comparisons of mean scores revealed that problem-solving process facilitators do not apply social media to research and stewardship, but do apply social media to programming.
This likely indicates that problem-solving process facilitators, who engage in research in order to collaborate with organization leaders in planning fundraising programs, do not view social media as useful for this task. It is possible that this group relies more heavily on sources other than social media to conduct research. As was discussed previously, it is not surprising that this group does not apply social media to stewardship, since AFP fundraisers in general do not currently use social media to solicit gifts or obtain pledges.

Interestingly, communication coder–expert prescribers use social media in the research, programming and stewardship steps of the fundraising process. Based on the conceptual definition, this group communicates with donor publics and plans and enacts fundraising strategy independent of organizational leadership. Thus, this group’s application of social media to the three steps of the fundraising process measured could be related to their independence from organizational leaders. It is possible that organization leaders do not endorse the use of social media in fundraising, or that fundraisers perceive leadership does not endorse using social media in this manner. As would be expected, technician-information collector/deliverers use social media for programming, but not for research. Based on the conceptual definition, this group would not be responsible for conducting research, although they would receive feedback from donor publics. Again, this group’s nonapplication of social media to stewardship is likely related to fundraisers’ overall nonapplication of social media to the solicitation element of programming.

One-way ANOVAs conducted to answer the third research question revealed no statistical differences between the fundraising roles on application of social media to the research, programming and stewardship steps of the fundraising process, with one exception regarding stewardship. The findings indicated problem-solving process facilitators are neutral regarding
application of social media to stewardship, while technician-information collector/deliverers do not apply social media to stewardship and communication coder–expert prescribers slightly apply social media to stewardship. These findings suggest practitioners are still weighing the pros and cons of applying social media to stewardship.

**Contributions of the Study to Practice and Scholarship**

The study has implications for the practice of professional public relations and its specialization of fundraising, as well as for academics studying these disciplines. The fundamental task of public relations professionals is managing relationships with key publics, which depends on effectively communicating with these groups. Successful communication, in turn, requires professionals to strategically select the best communication tactics or techniques. As such, public relations professionals must be attuned to trends in how their key publics consume media and gather information.

As previously discussed, the study’s findings suggest fundraising practitioners who belong to AFP may underestimate the percentage of their various donor publics that use social media on a regular basis, which could result in overlooking social media as potential fundraising techniques, or tactics. AFP members believe major donors are far less likely to use social media than individual donors and all donors, including foundations and corporations. This finding could reflect practitioners’ assumption that older individuals will be less likely to use social media, as major gift donors tend to be older, financially established individuals. As discussed previously, these perceptions are related to how useful practitioners think social media is in their work and their behavioral intention to use social media in their work. Making assumptions about donor publics’ social media use could lead to a disconnect between the communication preferences of target publics and the activities of fundraising professionals.
A primary contribution of the study to the practice of public relations and its specializations, such as fundraising, is its articulation of how social media tactics might effectively be applied to the public relations and fundraising processes. This study developed, tested and validated an original scale that demonstrates how social media might be applied to three major steps of the fundraising process. As noted previously, reliability scores for most elements of this index were strong. With modifications, this tool can also be used by academics to measure how public relations practitioners and those employed in specializations of public relations, apply social media in their work.

This study showed that, although at small levels, fundraising practitioners are applying social media as advocated in this study. Practitioner authors have argued that social media represent an opportunity to enhance the practice of public relations, particularly as its interactive nature facilitates two-way communication between organizations and their key publics. Though some practitioner literature previously described how social media could be used in public relations or how practitioners currently were using social media, no work before this study had explicitly tied social media to the strategic public relations process. The scale developed here will be instructive to practitioners wishing to learn how they might apply social media to the public relations process and those wishing to audit their department’s use of social media in public relations. In short, this scale might also serve as a roadmap for academics wishing to prepare future public relations professionals to implement social media into their public relations programs.

As previously argued, fundraising is the specialization of public relations that manages relationships between charitable organizations and their donor publics. Effective fundraising is critical to charitable organizations’ success, because these organizations are financially
dependent on gifts from their donor publics. Charitable gifts fund everything from everyday operating costs, to employee salaries to the programs and services that address charitable organizations’ missions.

This study’s findings suggest that AFP fundraisers may underestimate their donor publics’ use of social media, which may result in overlooking social media as potential techniques in their fundraising programs. This could explain AFP members’ limited application of social media to the fundraising process. Although, unlike public relations, fundraising lacks formal educational programs led by academics, fundraising practitioners can use the scale developed here to learn how they might appropriately apply social media to the fundraising process. The tool might prove useful in professional seminars and workshops and to practitioners entering colleges and universities to instruct courses on fundraising.

Another contribution of this study is its validation of the TAM and its extension to the study of public relations, particularly fundraising. This study demonstrated that the TAM does, to some extent, explain why fundraisers do or do not use social media in their work. Moreover, the study’s findings demonstrate that the theory presented in this study to explain fundraisers’ use of social media does significantly predict fundraisers’ use of social media in their work. Future studies might further test and extend this theory, as will be discussed in the section on directions for future research.

Finally, the study contributes to scholarship in public relations and fundraising in that it provides evidence of the validity and reliability of Kelly’s (1998b) measures of fundraising roles. Importantly, however, this study’s findings suggest that a new three-role typology might better explain the current fundraising behavior of AFP members.
Limitations of the Study

Based on the previous discussions of the TAM and roles findings, the inclusion of several additional variables may have helped more fully explain fundraisers’ perceptions of social media and why fundraisers use social media as they do. For example, fundraisers’ personal use of and experiences with social media likely impact their views of how easy these technologies are to use, how useful they are and fundraisers’ tendency to use social media on the job.

As was emphasized by the original TRA, fundraisers’ perceptions and use of social media technologies, likely are impacted by their perception of how relevant influentials evaluate and use these technologies. Although the present study examined how fundraisers’ perceptions of donor and organizational use of social media relate to their social media use, additional variables could have been included in the present study. For example, does the fundraiser perceive that relevant professional associations view social media as acceptable for application to fundraising and useful in fundraising? Do they believe other fundraisers widely apply social media to fundraising? These views, along with fundraisers’ motivation to comply with influentials’ opinions, likely impact fundraisers’ attitudes toward and use of social media.

A limitation of this study was its sampling frame. The study’s sample was drawn from the American membership of one professional fundraising association, the Association of Fundraising Professionals. The population of interest for this study was all American fundraising professionals; however, this sampling frame does not exist. It is possible that this study might have yielded different results had a different group of fundraisers been sampled. Other possible sampling frames include the Council for Advancement and Support of Education (CASE) and the Association for Healthcare Philanthropy (AHP). Moreover, because membership in any of these professional organizations is relatively expensive, professional associations likely represent fundraisers from larger, wealthier organizations and those who have more fundraising
experience. This is evidenced by the fact that most responding AFP members reported they are heads of fundraising or senior managers and that entry-level fundraisers were not well represented in the sample. Future studies, therefore, might investigate different population lists or combine sampling frames in order to more fully represent American fundraisers’ perceptions and use of social media.

Another consideration related to this study’s external validity is its relatively low response rate of 36%. A response rate of 50% or more would have provided greater confidence in the findings. It is possible that those members of the sample who responded to the survey are different in some way than those who did not respond. For example, respondents might have different attitudes or behaviors related to social media than those who chose not to respond.

As was mentioned in Chapter 3, issue salience is thought to be a major influence on whether individuals chose to participate in a survey, so this response rate may indicate that social media has low salience for AFP members. One limitation of the present study was its assumption that social media is used in mainstream fundraising. Additional studies are needed to further explore fundraisers’ perceptions and behaviors related to social media.

**Directions for Future Research**

The TAM findings presented here should be extended through future studies, including those that further explore the predictor variables and add other variables. Expansion of the TAM to include additional predictor variables might potentially improve prediction of fundraisers’ use of social media, though it is generally favorable to err on the side of parsimony when constructing models. The TRA, from which Davis (1986, 1989) originally derived the TAM, considered how others might influence whether an individual forms the intention to act. The TRA included subjective norm, or the individual’s perception of whether influentials think a behavior should be performed, mediated by the individual’s motivation to comply with these
influentials’ opinions, as one of its predictor variables. Subjective norm was seen as one of two variables contributing to the behavioral intention to perform an act.

A recent article by Eyrich, Padman and Sweetser (2008) suggested public relations practitioners’ integration of social media into their work may be connected to their perceptions of their peer groups’ use of social media. That study surveyed public relations practitioners about use of 18 social media tools and found a weak positive correlation between practitioners’ use of social media and their perception of how widely these tools were used within the industry ($r = .22$). Similarly, Goodman’s (2006) report on the Makovsky 2006 Corporate Blogging Study suggested the views of CEOs will impact whether social media are implemented by an organization. Even a cursory review of the Web sites of relevant professional groups reveals the subject of social media is on fundraising practitioners’ radar. Future surveys of fundraisers should measure practitioners’ perceptions of peer and professional association views of social media and fundraisers’ motivation to comply with these perspectives. As previously discussed, fundraisers’ personal use of social media likely impacts their perceptions of social media and on-the-job use of social media. Inclusion of these variables in the model might better predict fundraisers’ social media use. More sophisticated analysis methods, such as causal modeling—which attempts to describe the causal relationships among a set of variables—might also improve understanding of fundraisers’ social media use.

As discussed previously, positive correlations were discovered between both fundraisers perceptions of how useful social media is in their work and their behavioral intention to use social media in their work and fundraisers’ estimates of the percentage of the three donor publics who use social media. In short, fundraisers’ perceptions of the extent to which their donor publics use social media are related to their perceptions and use of social media in their work. In
that the study’s findings suggest AFP fundraisers may underestimate the extent to which their donor publics use social media, future studies should attempt to measure social media usage among donors.

This study developed, presented and validated an original scale of application of social media to three major steps of the fundraising process. Further, the reliability of the index for application of social media to research was strong, but reliability scores for the indices of application of social media to programming and stewardship were only acceptable. Though this is not unexpected for new indices, future methodological studies should work to improve the reliabilities of these two indices. Moreover, this tool should be used in additional surveys of different groups of fundraisers to measure how populations beyond AFP apply social media to their work. With modifications, this scale can be used in survey research measuring how public relations practitioners, and practitioners working in other specializations of public relations, such as media relations, apply social media to their work. Table 5-1 demonstrates how this scale could be modified to apply to public relations practitioners.

Table 5-1. Scale of Application of Social Media to Fundraising Process Adapted to Public Relations.

<table>
<thead>
<tr>
<th>Step</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>I track social media to learn public opinion of our organization.</td>
</tr>
<tr>
<td></td>
<td>I use social media to identify key individuals who are talking and posting about our organization.</td>
</tr>
<tr>
<td></td>
<td>I track social media to find conversations about our organization.</td>
</tr>
<tr>
<td></td>
<td>I track our competitors using social media.</td>
</tr>
<tr>
<td>Programming</td>
<td>I use social media to inform target publics about our organization.</td>
</tr>
<tr>
<td></td>
<td>I use social media to correct rumors and inaccurate information about our organization.</td>
</tr>
<tr>
<td></td>
<td>I use social media to request key publics’ support.</td>
</tr>
<tr>
<td></td>
<td>I use social media to obtain key publics’ promises of support.</td>
</tr>
</tbody>
</table>
Finally, this study’s findings suggest that a three role-typology better explains the current fundraising behavior of AFP members than do Kelly’s (1998b) four fundraising roles. Although this study, which provided only a snapshot of AFP members’ current fundraising behavior, suggests convergence in Kelly’s (1998b) four fundraising roles, these findings are not sufficient to invalidate the original four-role typology. Additional studies are needed to explore how fundraisers’ behavior changes over time. In other words, will the three-role typology continue to better explain fundraising behavior over time, or will the two new roles conceptualized in this study diverge back to the three roles originally conceptualized by Kelly (1998b)? These questions can be addressed through additional surveys of fundraising practitioners over time. Future studies might also explore whether the four fundraising roles describe fundraisers’ behavior in other countries with an active charitable sector, such as the United Kingdom.

In conclusion, this study served several important purposes. It described the extent to which AFP members predominantly enact each of the four fundraising roles and suggested a three-role typology better explains AFP members’ current fundraising behavior. The study demonstrated that AFP members are just beginning to apply social media to their work as this study advocated. Moreover, the study found that fundraisers’ perceptions of how useful social media are in their work are positively related to their estimates of the percentages of the three donor publics that use social media. The study’s findings also suggest that fundraisers may
underestimate the extent to which their donor publics use social media. Moreover, the model presented to explain fundraisers’ use of social media did significantly predict fundraisers’ use of social media in their work. Despite its limitations, the study has important implications for both practice and scholarship and suggests several fruitful areas for future research.
DATE: May 18, 2009

TO: Meredith L. Lord
10000 SW 52nd Avenue #147
Gainesville, FL 32608

FROM: Ira S. Fischler, PhD, Chair
University of Florida
Institutional Review Board 02

SUBJECT: Approval of Protocol #2009-U-0494

TITLE: Social Media and Fundraising

SPONSOR: None

I am pleased to advise you that the University of Florida Institutional Review Board has recommended approval of this protocol. Based on its review, the UFIRB determined that this research presents no more than minimal risk to participants, and based on 45 CFR 46.117(c), an IRB may waive the requirement for the investigator to obtain a signed consent form for some or all subjects if it finds either: (1) That the only record linking the subject and the research would be the consent document and the principal risk would be potential harm resulting from a breach of confidentiality. Each subject will be asked whether the subject wants documentation linking the subject with the research, and the subject’s wishes will govern; or (2) That the research presents no more than minimal risk of harm to subjects and involves no procedures for which written consent is normally required outside of the research context.

The IRB authorizes you to administer the informed consent process as specified in the protocol. If you wish to make any changes to this protocol, including the need to increase the number of participants authorized, you must disclose your plans before you implement them so that the Board can assess their impact on your protocol. In addition, you must report to the Board any unexpected complications that affect your participants.

If you have not completed this protocol by May 09, 2010, please telephone our office (392-0433), and we will discuss the renewal process with you. It is important that you keep your Department Chair informed about the status of this research protocol.

ISF:dl
To: [recipient email address]

From: merlord1@ufl.edu

Subject: Invitation to Participate in Social Media and Fundraising Study

Body:

Dear [recipient name]:

Thank you for taking the time to read this message! There is currently a lot of buzz about how social media (i.e., Facebook, MySpace, Twitter) applies to the practice of fundraising. My name is Meredith Lord, and I am a doctoral candidate at the University of Florida leading a study on this topic.

Due to your fundraising expertise, I would like to invite you to participate in this study by completing a very brief online survey. It is not necessary that you currently be using social media in your job to participate. At the study's conclusion, you will be provided with an executive summary of the study's finding which will explain how your peer organizations are currently using social media. The link to the study can be found below.

http://www.surveymonkey.com/s.aspx?sm=ffTrzvvLM7j2D7LU_2fjnz6Cs1sQd_2fDcty42g1q4RnL2c_3d

If you wish not to receive any more messages, simply click the link below and you will not be contacted again.

http://www.surveymonkey.com/optout.aspx

Thank you for your valuable time!

Meredith Lord
Doctoral Candidate
University of Florida
College of Journalism and Communications
Department of Public Relations
merlord1@ufl.edu
To: [recipient email address]

From: merlord1@ufl.edu

Subject: Reminder of Invitation to Participate in Social Media and Fundraising Study

Body:

Dear [recipient name]:

My name is Meredith Lord, and I am a doctoral candidate at the University of Florida leading a study on how social media applies to the practice of fundraising. Due to your fundraising expertise, I recently invited you to participate in this study by completing a very brief online survey.

It is not necessary that you currently be using social media in your job to participate. At the study's conclusion, you will be provided with an executive summary of the study's findings which will explain how your peer organizations are currently using social media. The link to the study can be found below.

http://www.surveymonkey.com/s.aspx?sm=ffTrzvLM7j2D7LU_2fjnz6Cs1sQd_2fDcty42g1q4RnL2c_3d

If you wish not to receive any more messages, simply click the link below and you will not be contacted again.

http://www.surveymonkey.com/optout.aspx

Thank you for your valuable time!

Meredith Lord
Doctoral Candidate
University of Florida
College of Journalism and Communications
Department of Public Relations
merlord1@ufl.edu
APPENDIX D
QUESTIONNAIRE

Entry Page

Thank you very much for participating in this survey. It will take no more than 15 minutes for you to complete. The bar at the bottom of each page indicates what percentage of the survey you have completed.

You will be guided through the pages of the survey by clicking "next" at the end of each page. When you reach the survey exit page, please make sure to select "done" to save your work and send it to the researcher. Click "next" to begin the survey.
Informed Consent for Participation in Study

Please read this consent information carefully before you decide to participate in this study.

Purpose of the research study:
The purpose of this study is to explore how social media applies to fundraising.

What you will be asked to do in the study:
To participate in this study, you will be asked to answer multiple-choice, short answer and check all that apply questions that will explore your thoughts and attitudes about social media in fundraising.

Time required:
No more than 15 minutes

Risks and Benefits:
This study will not pose any risks to your mental or physical health. It is not expected that any benefits will accrue to you as a result of participation in this study.

Compensation:
You will not be compensated for participating in this study.

Confidentiality:
Your identity will be kept confidential to the extent provided by law. Your information will be assigned a code number. The list connecting your name to this number will be kept in a locked file cabinet in the principal investigator’s office. When the study is completed and the data have been analyzed, the list will be destroyed. Your name will not be used in any report.

Voluntary participation:
Your participation in this study is completely voluntary. There is no penalty for not participating. You do not have to answer any questions you do not wish to answer.

Right to withdraw from the study:
You have the right to withdraw from the study at anytime without consequence.

Whom to contact if you have questions about the study:
Meredith Lord, Doctoral Student, College of Journalism and Mass Communications – Department of Public Relations, email: merlord1@ufl.edu, phone: 904-535-0666.

Dr. Kathleen S. Kelly, Professor – Department of Public Relations, College of Journalism and Mass Communications, email: kskelly@jou.ufl.edu, phone: 352-392-9359

Whom to contact about your rights as a research participant in the study:
IRB02 Office, Box 112250, University of Florida, Gainesville, FL 32611-2250; phone 392-0433.

After reading the information above, please mark the item below to indicate whether you agree to participate in the study.

I have read the procedure described above. I voluntarily agree to participate in the procedure and I have received a copy of this description.

I have read the procedure described above. I do not agree to participate in the study.
### General Survey Instructions

Please stop and read these general survey instructions before continuing to the next page.

This survey explores the application of social media to fundraising. Examples of social media include social networking sites (i.e., Facebook, MySpace), blogging (i.e., with an organization-sponsored blog, Twitter or videoblogging) and media sharing (i.e., YouTube, Flickr). Your input will help generate knowledge about fundraising that will lead to more effective practice. Thank you in advance for sharing your perspective.

In this survey, you will be asked to report your thoughts on using social media in your work. As you complete the questions, please keep in mind you are not being asked about using social media in your personal life, just in your career. Also, when this survey refers to "donors" and "potential donors," it usually includes individuals, corporations and foundations. Your responses will remain confidential and will never be reported in connection with your name or your organization's name. Please do not leave any questions blank.
Organization Questions

The first section asks some questions about your organization. For each question, please select the one response which best describes your organization.

**Which best describes the primary mission of your organization?**

- Health
- Human services
- Religion
- Arts, culture & humanities
- International affairs
- Public/society benefit
- Environment & animals
- Education
- Other

**In which region of the U.S. is your organization located?**

- Northeast (ME, NH, VT, MA, RI, CT, NY, PA, NJ, DE, MD, D.C.)
- Midwest (WI, MI, IL, IN, OH, ND, SD, NE, KS, MN, IA, MO)
- Southeast (VA, WV, NC, SC, FL, GA, KY, TN, MS, AL, AR, LA)
- Southwest (OK, TX, NM, AZ)
- West (ID, MT, WY, NV, UT, CO, AK, WA, OR, CA, HI)

**How many full-time fundraisers does your organization have on staff?**

**What was your organization's approximate total revenue in the last fiscal year?**

**Please estimate private gifts raised by your organization in the last fiscal year.**
How frequently does your organization utilize social media for fundraising?

<table>
<thead>
<tr>
<th></th>
<th>Very frequently - 9</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>8</td>
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<td>7</td>
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<td>3</td>
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<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Not at all frequently - 1</td>
</tr>
</tbody>
</table>

What percentage of your organization's donors (including foundations and corporations) do you estimate use social media weekly?

What percentage of just your organization's individual donors do you estimate use social media weekly?

What percentage of your organization's donors who provide the greatest proportion of dollars (as opposed to the largest number of gifts) do you estimate use social media weekly?
Social Media in Fundraising Questions

The next set of items asks about social media and using social media in your job. For each of the following statements, indicate the extent to which you agree or disagree by clicking 9 to indicate that you "strongly agree" and 1 to indicate that you "strongly disagree." Keep in mind you are evaluating social media for use in your fundraising job, not in your personal life.

<table>
<thead>
<tr>
<th>Strongly Agree - 9</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>Strongly Disagree - 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>My interaction with social media would be/is clear and understandable.</td>
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<td>I would/do find social media easy to use.</td>
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<td>It would/be is easy for me to become skillful at using social media.</td>
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<tr>
<td>I plan to use social media for fundraising in the next 12 months.</td>
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<tr>
<td>I would/do find social media useful in my job.</td>
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<td></td>
</tr>
<tr>
<td>I predict I will use social media for fundraising in the next 12 months.</td>
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<td></td>
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<tr>
<td>Using social media would/does allow fundraising tasks to be accomplished more quickly.</td>
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<td></td>
</tr>
<tr>
<td>Using social media would/does increase fundraising productivity.</td>
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<td></td>
</tr>
<tr>
<td>Learning to operate social media would be/is easy for me.</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Social Media in Fundraising Questions Cont'd

Please indicate whether you personally use social media in your fundraising job. Please note you are not being asked about your use of social media in your personal life. If you use social media in your personal life, but not in the workplace, please respond "no" to the item. Even if you use social media very infrequently at work, you should still select "yes."

**Do you personally use social media in your fundraising job?**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>
# Social Media Use Questions

The following section asks about how you use social media for fundraising. For each statement, indicate the extent to which you agree or disagree by clicking 9 to indicate that you "strongly agree" and 1 to indicate that you "strongly disagree." The term "donor(s)/potential donor(s)" refers to individuals, corporations and foundations. Please do not leave any items blank.

<table>
<thead>
<tr>
<th>I use social media to personally thank donors for gifts.</th>
<th>8</th>
<th>7</th>
<th>6</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th><strong>Strongly Agree - 9</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>I use social media to assure donors their contributions are appreciated.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to address donors’ concerns about our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to monitor what is being said and posted about our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to place stories about our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to ask for charitable gifts.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I track social media to learn public opinion of our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to provide content/information about our organization to key influencers in social media.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to inform donors and potential donors about our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to give donors personalized attention.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I use social media to track public opinion on issues important to our organization.</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td><strong>Strongly Agree - 9</strong></td>
</tr>
<tr>
<td>I very frequently use social media in my job.</td>
<td>8</td>
<td>7</td>
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<td>I use social media to engage donors/potential donors in dialogue.</td>
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<td>I use social media to tell donors how the organization has used their gifts.</td>
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<td>I track our competitors using social media.</td>
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<td>I track social media to find conversations about our organization.</td>
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<td>I use social media to inform donors about our organization's finances.</td>
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<td>I use social media to assure donors we adhere to the highest ethical standards.</td>
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<td>I use social media to encourage donor involvement.</td>
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<td>I use social media to distribute solicitation messages.</td>
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<td>I use social media to accomplish tasks assigned to me.</td>
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<td>I use social media to obtain pledges from donors.</td>
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<td>I use social media to identify key individuals who are talking and posting about our organization.</td>
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<td>I use social media to assure donors their gifts will be used economically and efficiently.</td>
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<td>I use social media to correct rumors and inaccurate information about our organization.</td>
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<td>I use social media to request donations.</td>
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**How long have you been using social media in your fundraising job? Please indicate your response in number of years (i.e., 1 year, 2 years, 3 years).**
## Fundraising Job Responsibilities

The following section asks about responsibilities that may or may not be part of your fundraising job. For each statement, please indicate the extent to which you agree or disagree by clicking 9 to indicate that you "strongly agree" and 1 to indicate that you "strongly disagree." The term "donor (s)/potential donor(s)" refers to individuals, corporations and foundations. Please do not leave any items blank.

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<td>I take responsibility for success or failure of fundraising.</td>
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<td>I create opportunities for management to hear donors.</td>
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<td>I handle technical aspects of producing materials.</td>
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<td>I keep the organization informed about media reports.</td>
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<td>Others hold me accountable for fundraising success.</td>
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<td>I make the fundraising policy decisions.</td>
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<td>I produce brochures, pamphlets, etc.</td>
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<td>I inform management of donor reactions to policies.</td>
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Individual Questions -- Last Section!

The next section consists of demographic questions. For the following questions, please mark the ONE answer which best applies to you.

What is your gender?
- Male
- Female

What is your race/ethnic background?
- African American
- Caucasian/Not Hispanic
- Asian/Pacific Islander
- Alaskan Native
- Hispanic
- Native American
- Multi-Ethnic

What is your highest level of education?
- Some college
- Bachelor’s degree
- Some graduate work
- Master’s degree
- Doctoral degree

What is your age?
- Under Age 25
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65 or more years old
Are you the head of fundraising for your organization?

- Yes
- No

Which of the following best describes your current position?

- Staff senior manager
- Staff middle manager
- Entry level staff
- Consultant
- Other (please specify)

To which of the following areas are your job responsibilities primarily geared?

- General management
- Annual giving
- Capital campaigns
- Corporate relations
- Foundation relations
- Major gifts
- Planned giving
- Government relations
- Research
- Grant writing
- Special events
- Support services
- Consultant
- Other (please specify)

Approximately how many years have you worked in your current position?

Approximately how many years have you worked for your current employer?
Is there anything else you would like to add about social media and fundraising?

You have completed the survey. Your information will not be saved and sent to the researcher until you click “done” below. Thank you very much for your participation! If you have any questions regarding this survey, please contact:

Meredith L. Lord
Doctoral Candidate - University of Florida
Email: merlord1@ufl.edu
Cell phone: (904) 535-0666
REFERENCES


BIOGRAPHICAL SKETCH

Meredith L. Lord received her Ph.D. from the College of Journalism and Communications at the University of Florida in the fall of 2009. Her research interests include social media, online relationship-building, nonprofit public relations and fundraising.

Lord also received her Master of Arts in mass communication degree, with an emphasis in public relations, from the University of Florida. Prior to attending the University of Florida, Lord received a Bachelor of Arts degree in English and communication studies from Furman University in 2004.