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APPLYING STEWARDSHIP THEORY

TO HIGHER EDUCATION DONORS

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Virginia S. Harrison

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The thesis of Virginia S. Harrison was reviewed and approved* by the following:

Denise Bortree
Associate Professor of Advertising/Public Relations
Thesis Adviser

Frank Dardis
Associate Professor of Advertising/Public Relations

Marcia DiStaso
Assistant Professor of Advertising/Public Relations

Marie Hardin
Associate Dean, College of Communications
Chair of Graduate Program
Professor of Journalism

*Signatures are on file in the Graduate School.

Abstract

Stewardship is the critical last step in the fundraising process, consisting of activities that help institutions to retain donors and increase their giving to higher education institutions. This study examined how stewardship strategies impact organization-public relationship outcomes for higher education donors and how the concept of involvement moderates this relationship. This study found that stewardship strategies positively predict OPR outcomes, and that annual donors, donors with one endowment, and donors with two or more endowments experience stewardship strategies and OPR outcomes differently. Particularly, the more endowments a donor has, the higher they rate these strategies and outcomes. This study also suggests that higher education donors may require a different set of stewardship strategies. Instead of the four used in previous studies, this study found only three stewardship strategies of respect, responsibility, and reciprocity. This study also found that involvement only slightly moderates the relationship between stewardship and OPR outcomes. The findings have important implications for higher education stewardship activities and theory.

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Introduction

Few quality fundraisers would ignore the importance of stewardship—the act of appropriately thanking and engaging donors—in their efforts to increase financial support to their organization. Just as good public relations centers on relationship building, good fundraising is about managing and balancing donor and organization expectations. Fundraising in higher education provides several examples of the importance of maintaining these relationships—and what could result if fundraisers don't diligently practice good stewardship.

On January 19, 2011, University of Connecticut athletic director Jeffrey Hathaway received a strongly worded letter from the largest donor to his struggling Division I football program. The donor, Robert Burton, had given $7 million to the program, and in return, had apparently asked to be involved in the hiring process for the new head football coach. It appeared from the letter that Hathaway and his officials, who seemingly made the hire without Burton, had not consulted Burton at all during the process. He wrote to Hathaway:

> Your lack of response on either of these requests tells me that you do not respect my point of view or value my opinion. …After this slap in the face and embarrassment to my family, …we are out at UConn. …We do not want to deal with people like you and your committee, who we do not trust and cannot count on to make the correct decisions or do anything right with our money (p. 1, 3).

Burton then wrote that, as a result of this treatment, he would not be renewing his football tickets, he would transfer his football scholarships to UConn's business school, and he requested that the $3 million he paid to the football complex be returned and his name removed from the building.

While seemingly outrageous, this example of a disgruntled donor in higher education shows the consequences at stake for organizations that do not properly steward their donors. As defined by Kelly (2001), stewardship is the final step in the fundraising process whereby fundraisers build upon relationships with previous donors to cultivate more gifts. Stewardship allows fundraisers "to meet obligations to the donor and provides an essential loop back to the beginning of the process for new efforts" (Kelly, 1998, p. 31). This step is crucial because it keeps the "fundraising process continuous" (p. 31). Repeat donors are easier and less expensive to acquire, and "their ongoing involvement is essential to…future success" of the organization (p. 31). This ongoing relationship with donors is crucial to sustaining fundraising efforts for an organization because it motivates the donor toward giving to the organization again and at higher levels each time (Schroeder, 2002; Worth, 2002a; Worth, 2002b; Sturtevant, 2001).

Retaining donors ensures the survival of organizations because their gifts represent significant capital needed for operations: According to the National Center for Charitable Statistics (NCCS), charitable contributions by individuals, foundations, and corporations totaled $298.42 billion in 2011, of which individuals gave $217.79 billion (2012). The importance of donor support in higher education has increased dramatically in recent years as the U.S. government (and others throughout the world) has decreased its support of higher education institutions, forcing these institutions to find alternative sources of support, which increasingly include dollars from private donors, corporations, and foundations (Worth, 2002a; Kelly, 1991; Peterson, 2008). As higher education joins the number of other organizations competing for donations in the U.S., the practice of fundraising is becoming more important to higher education institutions' survival (Worth, 2002a; Kelly, 1991).

Therefore, because it is a vital part of the fundraising process, stewardship is becoming an even more critical strategy in higher education fundraising. "Continuing attention to stewardship can improve not only fundraising performance but also the sense of trust and confidence upon which the donors' relationship to an institution must be built" (Worth, 2002b, p. 17). Communication is so vital to this relationship-building process that fundraisers believe continual communication with donors is not just good practice but "part of the responsibility that development officers incur when they accept a gift for some purpose" (Worth, 2002b, p. 17). Therefore, the role of communication is so central to these relationships that fundraising can be considered a public relations function focused on building relationships between organization and donor publics; therefore, public relations theories about relationship management can be applied to fundraising practices (Kelly, 1991).

Given the increasing importance of fundraising and stewardship of donors in the higher education sector, additional research is needed to further explore public relations fundraising theory and develop useful knowledge that can be applied to the practice of higher education fundraising. While researchers have tested this theory on donor publics to show its applicability to strategy in the nonprofit sector (Waters, 2008; Waters, 2009; Waters, 2011; Worley & Little, 2002; Merchant, Ford, & Sargeant, 2010), the theory has not been thoroughly applied to populations of donors to higher education institutions. The purpose of the current study is to test how stewardship strategies can affect relationships between higher education institutions and their donor publics to retain and cultivate these donors toward their next gifts.

Literature Review

Relationship Management Theory

Relationship management theory is fundamental to the study of public relations. According to Ledingham (2006) this theory "suggests that the balancing of interests of organizations and publics is achieved through the management of organization-public relationships" (OPRs) (p. 465). Before OPRs are explored further, however, theorists need to define just exactly what relationships are, argues Broom et al. in their 1997 study. The authors reviewed interpersonal communication, psychotherapy, interorganizational relationships, and systems theory to determine that relationships are "dynamic results of the exchanges and reciprocity that manifest themselves as (they) evolve," (p. 95) with "unique and measurable properties" (p. 95). Relationships also have separate, measurable "antecedents and consequences" that "distinguish them from the relationship" itself (p. 95). Most important, research has shown that relationship management theory is more than communication with a public, but an ongoing maintenance of interactions, a concept that fundamentally questioned practices at that time but has now become an accepted understanding (Ledingham, 2006; Ledingham & Bruning, 2000).

As a general theory of the public relations discipline, the development of relationship management theory has been crucial to the field and its theoretical understanding of public relations. Relationship management theory, with its emphasis on publics, positions the practice of public relations in an organizational framework and develops measurements to demonstrate public relations' value to an organization (Ledingham, 2006; Grunig & Huang, 2000).

Bruning and Ledingham (1999) looked closely at public attitudes to determine the quality of a relationship. Their study suggested that these ties are multidimensional, and that

organizations and publics have three types of relationships: professional, personal, and community, each with different expectations. Work by Bruning and Galloway (2003) further determined that relationships are multidimensional in nature, focusing on measurable attitudes of parties in a relationship. By studying customers of an electric company, they expanded Ledingham and Bruning's scale to show that anthropomorphism (giving human qualities to the relationship), professional benefits/expertise, personal commitment, community improvement, and comparison of alternatives can help show how relationships "develop, change, or are maintained" (p. 311).

Several studies have shown what relationship factors predict attitudes and behaviors in publics, thus strengthening the theory and demonstrating its usefulness to the practicing field of public relations (Bruning, 2002; Bruning & Hatfield, 2004; Bruning et al., 2004; Bruning et al., 2006). Through studying the relationship of a bank and its customers, Bruning and Hatfield found that customers who felt they were in a relationship with the bank "are significantly more likely to be satisfied with the bank" (2002, p. 12). Bruning et al. (2004) sought to expand Ledingham's relationship management theory by looking specifically at customers of an electric company and how their relationship attitudes reflect their satisfaction and loyalty to the company. They found that "organization-public relationships, when managed effectively, positively affect the attitudes, evaluations, and behaviors of key public members" (p. 445). All of these studies emphasized the research implications for organizations, particularly the value of focusing on relationship-building techniques to engage and monitor publics because good relationships lead to customer retention (Bruning, 2002; Bruning & Hatfield, 2004; Bruning et al., 2004; Bruning et al., 2006).

Although Broom et al. observed that little research has been able to measure relationships directly because they are so abstract in nature (1997), some have created scales to measure the outcomes of relationships, which can help predict the quality of the relationship. Measuring the outcomes of relationships rather than short-term behaviors that result from decisions is particularly important to understanding how these relationships can be maintained long-term (Hon & Grunig, 1999). Huang and Grunig suggested that "four features seem to represent the essence of organization-public relationships" (2000, p. 42), which are trust, control mutuality, commitment, and satisfaction. These outcomes exist in relationships on a continuum. Hon and Grunig first developed measurement scales for these four outcomes in a study published by the Institute for Public Relations (1999). See Appendix A for an illustration of relationship management theory.

Trust shows a public's "confidence in an organization's reliability and integrity" (Kim & Chan-Olmsted, 2005, p. 148). It is multidimensional, consisting of three attitudes: integrity, the "belief than an organization is fair and just" (Hon & Grunig, 1999, p. 19); dependability, "belief that an organization does what it says it will do" (p. 19); and competence, "belief that an organization has the ability to do what it says it will do" (p. 19). Professional benefit, an aspect of the competence part of trust, was found to relate significantly to whether or not a citizen felt he/she benefited from his/her relationship with a city government (Bruning et al., 2004; Bruning et al., 2008). In Waters' 2011 study of nonprofit donors, he found that trust was one of two outcomes that significantly predicted a donor's participation in the most recent fundraising campaign.

According to Hon and Gruning (1999) control mutuality is the "degree to which parties agree on who has rightful power over the other" (p. 19). While imbalances in power sometimes

exist, if one side is dominating the relationship, the other relationship outcomes of trust, commitment, and satisfaction will suffer (Hon & Grunig, 1999; Huang & Grunig, 2000; Kim & Chan-Olmstead, 2005). Bruning et al. (2006) determined that the idea of a mutual benefit for an organization and public is significantly related to a person rating a company satisfactorily and to their behavioral intent to support the company. In Hon and Grunig's 1999 study of people's relationships with five major corporate and nonprofit organizations, control mutuality was the weakest OPR outcome, signifying that people did not feel they had the power to influence major organizations like the Red Cross or General Electric.

Commitment is the "degree to which one party believes and feels that the relationship is worth spending energy to maintain and promote" (Hon & Grunig, 1999, p. 20). Under commitment are two dimensions: continuance, "which refers to a certain line of action" (p. 20) like meeting goals, and affective, "which is an emotional orientation" (p. 20) like feeling personally invested in the goals. Bruning et al. (2004) found that personal commitment to the organization-public relationship strongly predicted whether a customer would say a company had met or exceeded the customer's expectations, rather than saying it had not met those expectations. Another study by Bruning and Galloway (2003) found that a public's commitment to an organization includes both personal commitment and comparison of alternatives, which further refined the scale. Commitment also substantially related to whether a citizen felt he/she benefitted from his/her association with the city government (Bruning et al., 2008).

Satisfaction is "the extent to which one party feels favorably toward the other because positive expectations about the relationship are reinforced" (Hon & Grunig, 1999, p. 20). This positive feeling is "an affective state resulting from an overall evaluation of his or her relationship with an organization" (Kim & Chan-Olmsted, 2005, p. 148). In their 2005 study,

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Kim and Chan-Olmsted found that, of the four OPR outcomes, only satisfaction significantly predicted customers' brand attitudes toward Sony products. Bruning (2002) also found that students' overall satisfaction with their college experience and their satisfaction with the university-student relationship were both strongly related to whether they would return to the institution in future years. In Waters' 2011 study of nonprofit donors, he found that satisfaction was one of two outcomes that significantly predicted a donor's participation in the most recent fundraising campaign.

Relationship management theory is particularly applicable to the practice and study of fundraising because building relationships with publics are central to both public relations and fundraising (Kelly, 1991). Waters' 2008 study found that repeat donors valued all four OPR outcomes more highly than one-time donors. He also found in both 2008 and 2011 that major gift donors valued these outcomes more highly than annual donors. These four outcomes also were significantly related to a donor's giving history, so that the higher the ratings on the OPR outcomes, the more years a donor had of past giving (Waters, 2011).

When applied to fundraising situations, studies have also demonstrated the ability of relationship attitudes to predict behaviors of publics who are involved with charitable organizations. In looking at college alumni's willingness to make financial contributions to their alma mater, Wright and Bocarnea (2007) found that "donor OPR significantly predicts alumni donor attitudes toward willingness to contribute to unrestricted funds" (p. 215). While OPR did not predict the size of the gifts or frequency of giving, the findings "suggest that donor OPR is an important nonprofit higher education organization development variable that nonprofit researchers, leaders, and practitioners should consider" (p. 230) in their donor engagement efforts.

Stewardship Theory

Stewardship theory fits nicely with relationship management theory in public relations, and it suggests alternate maintenance strategies that lead to the four OPR outcomes (Hon & Grunig, 1999). Kelly (2001) developed the ROPES model of public relations to emphasize the ongoing nature of relationships between organizations and publics. ROPES is an extension of the ROPE model of public relations developed by Jerry Hendrix, which outlined a relationship management process focused on the four steps of research, objectives, programming, and evaluation (Kelly, 2001). Public relations emphasizes maintaining relationships just as much as establishing new ones, and therefore, Kelly argues, public relations process models must include a final step to keep the relationship ongoing in nature. Stewardship is this final step according to her ROPES model of public relations, which consists of the five sequential steps of research, objectives, programming, evaluation, and stewardship (Kelly, 2001). These very same strategies can be applied to fundraising because fundraising is a form of public relations between organizations and their donor publics (Kelly, 1991). The ROPES process can therefore be applied to fundraising to develop a "strategic, integrated approach to raising all gifts and managing donor relations" (Kelly, 1998, p. 27). Stewardship consists of four communication strategies, which exist on a continuum and apply to fundraising in the following ways: reciprocity (showing gratitude to donors for gifts), responsibility (using gifts as the donor intended), reporting (informing donors of gift use), and relationship nurturing (continually keeping in contact with donors) (Kelly, 1998). See Appendix B for an illustration of stewardship.

Research has found that the stewardship strategies of reciprocity, responsibility, reporting, and relationship nurturing can be employed by organizations to predict the relationship management outcomes of trust, control mutuality, commitment, and satisfaction (Waters, 2008;

Waters, 2009; Waters, 2011). Studies found that stewardship leads to stronger evaluations of the organization-public relationship outcomes, and in one case, stewardship strategies were stronger predictors of these outcomes than public relations cultivation strategies (Waters, 2009). In many studies, major gift donors rated all four stewardship strategies more highly than did annual donors (Waters, 2008; Waters, 2009; Waters, 2011). Other studies reiterated the importance of stewardship practices. Another case study examined the Coaches vs. Cancer campaign at a major university and found that the campaign was not successful because it did not employ Kelly's stewardship strategies in the execution of the campaign (Worley & Little, 2002). These studies only applied stewardship theory to donors of nonprofits, so Waters has called for more work to be done in testing stewardship theory in other areas of public relations.

Although more work needs to be done, literature has already defined the four strategies of stewardship. The first, reciprocity, is "a universal component of all moral codes" according to Alvin Gouldner (as cited in Kelly, 2001, p. 284). If an organization "takes" something from someone or a public, they must give something in return to follow this moral code. In fundraising, this is manifest when organizations show their thanks—in the form of a personalized letter, for example—for the gift. In two-way symmetrical public relations, reciprocity is this "process of continual and reciprocal exchange between an organization and its key publics" (Kelly, 2001, p. 285). Merchant, Ford, and Sargeant (2010) found that acknowledging a donor's gift with a letter (reciprocity) is important to building a positive organization-donor relationship, and a donor's negative emotions increase when a letter is not sent. In Waters' 2009 study, reciprocity was rated the highest by donors but had no significant influence on any of the four relationship outcomes. In Waters' 2011 study, reciprocity was found to have significant influence on the satisfaction of major gift donors, one of only two to do so (reporting was the

other). However, in the same study, reciprocity also had a statistically negative effect on trust for annual donors.

Responsibility means that organizations strive to keep their word. The organization must fulfill certain promises it made to the donor when soliciting the gift, demonstrating the "organization is worthy of supportive actions and behaviors" (Kelly, 2001, p. 285). Otherwise, the organization may lose the trust and support of its donors (Kelly, 2001). In many studies, responsibility seems to provide some of the strongest links between stewardship strategies and relationship management outcomes. In Waters' 2009 study, responsibility significantly influenced donors' evaluation of the relationship management strategy of commitment, the third-strongest link in the study. It also impacted satisfaction, control mutuality, and trust significantly as well. In Waters' 2011 study, responsibility's influence on satisfaction and responsibility's influence on commitment were the second and third strongest links found. Responsibility was also one of the few strategies that influenced the relationship outcome of trust for both major gift and annual donors.

Reporting is the duty of an organization "to keep publics informed about developments related to the opportunity or problem for which support was sought" (Kelly, 2001, p. 285). It reinforces positive attitudes and behaviors and allows publics to be accountable to society for their actions (Kelly, 2001). While reporting was found to predict relationship management outcomes for donors, other stewardship strategies were stronger influencers in Waters' 2009 study. In Waters' 2011 study, reporting had a significant effect on satisfaction for major gift donors, but this relationship was negative, the only such relationship found.

Relationship nurturing may be the most important facet of stewardship: "Relationships so critical to the organization's success must be nurtured" (Kelly, 2001, p. 286). Particularly in

fundraising, repeat donors are cheaper and easier to motivate to give when compared to first-time donors. Thus, this strategy is vital for organizations to master. In practice, relationship nurturing is simple, and involves organizations keeping publics in mind at all times, particularly through involvement in the organization and keeping the public informed (Kelly, 2001). While it sounds like relationship nurturing may sound similar to the other three strategies (reciprocity, responsibility, reporting), past studies have found relationship nurturing to be a wholly separate factor than the other three (Pressgrove, 2013). The leading role of this strategy is reflected in the findings of Waters' 2009 study, which found that relationship nurturing had four of the five strongest relationships with the relationship management strategies. Therefore, it strongly predicted all four outcomes of trust, commitment, control mutuality, and satisfaction. This finding led Waters to conclude that fundraisers should spend a lot of their time on building relationships with donors. In Waters' 2011 study, he found that relationship nurturing again had significant influence on trust and control mutuality for major gift donors. For annual donors, the strongest relationship found in the study was relationship nurturing on trust. Relationship nurturing also had significant positive relationships with commitment, satisfaction, and control mutuality for annual donors.

Although no studies that tested Kelly's stewardship strategies in higher education fundraising were found by the researcher, one study found that "communication gaps" (Grant & Wolverton, 2003, p. 48) exist in current stewardship practices in higher education, meaning institutions do not communicate effectively with their donors about their gifts, leaving donors with poor perceptions of stewardship at the institution and poor overall experiences with the fundraising staff (Grant & Wolverton, 2003). The study called for the development of a "diagnostic tool" (p. 61) that could measure donors' perceptions of quality stewardship and

inform institutions how to better communicate with donors. Given other studies that have tested stewardship strategies empirically, Kelly's four parts of the stewardship process could be this tool.

Application to Higher Education

Applying stewardship theory specifically to higher education donors is valuable because many studies on higher education fundraising show that higher education donors have different motivations to give organizations than those in the nonprofit sector. Donors who give to higher education have different relationships with these organizations than they do with nonprofit organizations they may also give to. Alumni may have strong bonds with their alma maters, while donors may find multiple causes to benefit across a university, whereas nonprofits may only have one cause to offer the donor. First, studies found that students who were involved in activities while enrolled in a higher education institution were more likely to give back to that institution after graduation (Monks, 2002; Sun et al., 2007; Baade & Sundberg, 1993; Baade & Sundberg, 1996; Stutler & Calvario, 1996; Lindahl & Conley, 2002). Participating in activities like student government, athletics, performing arts, greek life, religious groups, or resident hall life leads to higher loyalty to the institution and create a feeling of connection to the school that lasts after graduation (Monks, 2003). "The more satisfied one is with their undergraduate experience, the more likely their intention will be to make a financial donation to their alma mater" (Stutler & Calvario, 1996, p. 13).

Satisfaction with the college experience was another important motivator for higher education donors. According to Monks' study (2003), students who said they were "very satisfied" (p. 126) with their experience in college were more than 2.6 times more likely to give to their alma mater than students who said they were "ambivalent," "generally dissatisfied," or

"very dissatisfied" (p. 126) with their experience. O'Neil & Schenke (2007) showed that engaging student-athletes while still in school can create positive feelings about their alma mater and lead former athletes to feel that they received benefits from their college experience. "Cultivating positive, long-term relationships with alumni, beginning when donors are still in school, has the potential to reap rewards for colleges and universities" (p. 61).

Third, students who received scholarship support were more likely to give back after graduation because they felt they had received a benefit from their school. The authors suggest creating more financial aid packages that include scholarship (rather than or in addition to loan) support will bring financial returns in the form of philanthropy after the students leave (Marr et al., 2005). A more recent study by McDearmon and Shirley (2009) disputed this claim and found that students who received loans or scholarships were not necessarily more charitable after graduation. They indicated that the rising student loan debt in recent years meant that those students who received loans or awards were no longer able to be charitable because of their financial situation. While more research is needed on this criterion, McDearmon and Shirley did suggest a fourth criterion for predicting charitable behavior: Alumni who reported being charitable to other causes outside of higher education were more likely to add their alma maters to their list of beneficiaries.

Fourth, donors don't simply rely on feelings about past experiences, but they must also feel good about the current state of the institution at the time they make a gift (Monks, 2002). Lindahl and Conley (2002) stress that the connection is built not simply by earning a degree but by continual relationship building even after graduation that "evolves only through the socialization process that results in a donor's identity with the organization or cause" (p. 95). The importance of post-graduation involvement was highlighted by a study from Weerts and Ronca

(2007). Instead of emphasizing the college experience, their study found that donors have both expectations about the college's needs and then expect to play an active role in filling these needs. These people are more likely to be involved in the college after graduation by returning to campus for visits, attending events like reunions, or keeping in touch with faculty or administrators. "Advancement officers must establish awareness of 'supporters in their backyard,' who may already be involved, but have not yet been asked to get involved as a volunteer or donor" (p. 32).

Because higher education donors have different connections to their organizations and have different motivations for supporting their organizations than nonprofit donors do, it is worth developing a study to test the organization-donor relationship in higher education as well. This study conducted a survey to test how stewardship theories can predict OPR outcomes in higher education. Because a positive relationship was found between stewardship strategies and OPR outcomes in the nonprofit sector, the researcher predicts a similar relationship to exist in higher education. Because other studies have found that involvement can mediate this relationship between relationship maintenance strategies and outcomes, the researcher also predicts that involvement will affect this relationship. Involvement may be particularly important to higher education donors who have strong connections with their alma maters. Several studies found that major gift donors valued stewardship strategies more than annual donors (Waters, 2008; Waters, 2009; Waters, 2011), so the study extended this relationship to annual gift and major gift donors in higher education.

Because Kelly (1998) emphasizes that stewardship is critical to retaining repeat donors, it is worth examining if stewardship is experienced differently in different stages. Donors usually begin their relationship with an organization by making a small gift, and as the relationship

grows and the organization demonstrates effectiveness and responsible management of the organization's funds, donors may be asked to make larger gifts (Waters, 2009; Schroeder, 2002; Ercolano, 2007). Higher education institutions maintain a strong annual giving program because future major gift donors often begin as annual donors, who provide smaller gifts (typically $1-$1,000) each year. "The annual gift has been the single most important predictor for major gift potential," writes Schroeder (2002, p. 77). Therefore, major gift donors should value stewardship higher because they should have been effectively stewarded from their first experiences as an annual donor.

Examining the jump from one major gift to two major gifts would also reveal how major gift donors at various levels of giving experience stewardship strategies differently. Major gift strategies include helping the donor think about both what he or she can do for the institution right now and what they can do in the future, hopefully moving them toward an "ultimate gift" (Dunlap, 2002, p. 42), which is the maximum gift an individual can afford to give. Moving donors to make major gifts, especially more than one, takes significant relationship nurturing (Dunlap, 2002), a key aspect of the stewardship process set forth by Kelly (1998). If an institution successfully stewards the first major gift, the second major gift would be a reflection of this positive relationship and stewardship success. Therefore, donors who make a second major gift would probably value these stewardship strategies higher than donors who have made their first gift or still only make annual gifts.

Endowments are giving vehicles that allow the donor to set up a permanent fund, invested by the institution, to provide funding for a specific purpose indefinitely (The University, 2013c). Because they are invested funds, the minimum gift level to create an endowment is

typically at the major gift level, approximately $20,000 (The University, 2013c; Office of University Development, 2012).

Involvement

The idea that involved constituents have lasting relationships with their organizations has been tested in public relations theory as well. The concept of involvement has been tested as a mediator in the relationship of organization-public relationship maintenance strategies and relationship outcomes (Bortree & Waters, 2010). It has also been found as a mediator between relationship antecedents and outcomes (Bortree, 2011). Involvement, as explicated by Zaichkowsky, describes to what level an individual is invested in a product, while being sensitive to personal, physical, and situational differences (1985). She developed a scale to test involvement in the study of consumer behavior, but the concept and scale have been used to measure "purchase decisions of financial services, sports fanaticism, brand loyalty, and news consumption" (Bortree & Waters, 2010, p. 5). Studies have found that involvement of volunteers with a nonprofit organization has positive affect on relationship outcomes, and publics with high involvement in an issue tend to be active and seek out information on that issue (Bortree, 2011). However, the concept has not been widely studied, and few applications have been made to public relations research.

Of the research that has been conducted, some studies have found that involvement is "a mediating factor in how organizational communication is processed" (Bortree & Waters, 2010, p. 4). Bortree and Waters' study (2010) found that involvement impacted how youth volunteers viewed their relationship with the nonprofit organization they volunteered for. Their study found that involvement was a mediating variable in the relationship between the relationship maintenance strategy of nurturance and five organization-public relationship outcomes, which

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included Hon and Grunig's four (satisfaction, commitment, trust, and control mutuality), and a fifth, admiration, proposed by Bortree and Waters (2010). A similar study by Bortree (2011) found that involvement is also a mediator between relationship antecedents (why a volunteer volunteers for an organization) and future intentions to volunteer with the organization. Her finding "suggests that the degree to which volunteers are involved in the organization directly impacts their future intentions toward the organization" (p. 47).

This study seeks to further explain the relationship between stewardship strategies and OPR outcomes by testing the role of this potential mediating variable of involvement in the population of higher education donors. Given the deep connections higher education donors have with their alma maters, the concept of involvement may be particularly important to explain donors' relationships with their institutions.

The Present Study

To test stewardship strategies in higher education, this study merged communications theory of public relations on relationship management and stewardship. Past studies have used organization-public relationship outcomes to measure a relationship between an organization and its publics (Bruning et al., 2004; Bruning et al., 2008; Bruning & Galloway, 2003; Hon & Grunig, 1999; Huang & Grunig, 2000; Kim & Chan-Olmsted, 2005; Waters, 2008; Waters, 2009; Waters, 2011), and theory suggests these outcomes can be applied to the donor-organization relationship found between higher education institutions and their donors. Stewardship strategies are mediating variables that can affect the outcomes of an organization-public relationship, and this study seeks to determine how stewardship strategies affect organization-public relationship outcomes in higher education. Involvement can be a second mediating variable that affects how stewardship leads to OPR outcomes. See Appendix C for a

model of the relationships being tested in this study. The following hypotheses and research questions were explored:

H1: OPR outcomes will be rated significantly higher by major gift donors with two endowments than by major gift donors with one endowment.

H2: OPR outcomes will be rated significantly higher by major gift donors than by annual donors.

H3: Stewardship strategies will be rated significantly higher by donors who have two or more endowments than by donors who have one endowment.

H4: Stewardship strategies will be rated significantly higher by major gift donors than by annual gift donors.

RQ1: For higher education donors, what is the relationship between stewardship strategies and OPR outcomes?

RQ2: How does involvement affect the relationship between stewardship strategies and OPR outcomes for each donor type?

Methodology

Instrument

To test the hypotheses and answer the research questions, a self-administered survey was distributed via email to donors of a large research university in the northeastern United States on September 17, 2013. The survey instrument started with clear instructions about the purpose of the survey and asked for informed consent of the respondent. Because a husband and wife may often use the same email address, the email with the survey was specifically addressed to one person in each household. The sample was pulled based on individual entries in the university's donor database, so the email directly addressed the respondent, unlike other telephone survey methods that interview the person with the closest birthday or simply the person who answers the phone (Groves et al., 2009).

The survey instrument was a questionnaire of attitudinal measures that have already been established as reliable and valid measures for stewardship, involvement, and OPR outcomes. The instrument used scales based on those in previously conducted studies, particularly the OPR outcome scales of Hon and Grunig (1999) and Waters' (2009) original scales for stewardship. Respondents were asked to rate their agreement with a statement on a seven-point Likert-type scale from strongly disagree (1) to strongly agree (7). Groves et al. (2009) advised that more than seven scale points can lead to cognitive burden for some respondents. Multiple items were used to operationalize one concept; for example, each of the four stewardship strategies was represented by four attitudinal questions in the scale. Using multiple items to represent one concept improves reliability of measures because it more fully captures the nuances of the attitude (Watt & van den Berg, 1995).

The instrument also included Zaichkowsky's (1985) established scale for involvement. She developed a semantic differential scale with 20 word pairs to capture the construct of involvement. This study used the same scale but included only the eight most relevant word pairs describing a person's relationship with a university. The scale was reduced in size due to fears of respondent fatigue with a 20-item scale along with the rest of the survey. The following word pairs from Zaichowsky's were included in the study: important-unimportant, of no concern-of concern to me, means a lot to me-means nothing to me, valuable-worthless, matters to me-doesn't matter, significant-insignificant, essential-nonessential, not needed-needed. These terms could be easily used to describe a person's feelings about an institution of higher education, which is why they were selected. Word pairs that were not included (irrelevant-relevant, useless-useful, trivial-fundamental, beneficial-not beneficial, uninterested-interested, vital-superfluous, boring-interesting, unexciting-exciting, appealing-unappealing, mundane-fascinating, undesirable-desirable, wanted-unwanted) could apply to one aspect of a higher education institution but do not clearly apply to the entire institution. Therefore, the most applicable pairs were used to prevent confusion.

Additional questions, based on previous studies in higher education, were asked to determine other dimensions of donor involvement. These questions were if the respondent has family members at the university and how long ago the respondent made his/her first gift to the university.

In addition to attitudinal scale items for stewardship, OPR outcomes, and involvement, the survey instrument included questions on giving history. Questions asked respondents how much they have given to the university and how many endowments they have created at the university. For example, respondents answered "How much money have you given to the

university over your lifetime?" by choosing one of the following categories: "$0 to $999,"
"$1,000-$9,999," "$10,000-$19,999," "$20,000-$99,999," "$100,000-$249,999," "$250,000-
$999,999," "$1,000,000-$4,999,999," and "$5,000,000 or more." These categories were based
on the university's minimum endowment level ($20,000) (Office of University Development,
2012) and the various criteria for its university-wide gift club, which recognizes donors who
have given at least $250,000 lifetime (The University, 2013b). Donors who have created
endowments are considered major gift donors because the minimum endowment level of
$20,000 would be considered a major gift (The University, 2013c; Office of University
Development, 2012), while annual donors typically make gifts between $1 and $1,000 per year
(Schroeder, 2002). Respondents also answered "How many endowments have you created at the
university?" by choosing categories of "0 endowments," "1 endowment," and "2 or more
endowments"; these categories were based on the three population subgroups this study hopes to
test (annual donors, major gift donors with one endowment, major gift donors with two or more
endowments). Because asking donors to recall these numbers specifically can be difficult—
especially when many donors take multiple years to pay off major gift pledges—respondents
chose a category in which they fall (Groves et al., 2009). Another question asked if the
respondent received the annual endowment report sent by the university.

Demographic questions were also included at the end of the survey, asking for income
level (with categorical answer choices), race, age, gender, and education level. The questionnaire
included questions about the respondents' relationships with the university, if they are an
alumnus/a, and how satisfied they were with their undergraduate experience. These questions
were based on previous studies examining alumni giving (Monks, 2002; Sun et al., 2007; Baade

& Sundberg, 1993; Baade & Sundberg, 1996; Stutler & Calvario, 1996; Lindahl & Conley, 2002).

Once the survey was designed, questions were proofread and approved by public relations scholars working with the researcher and others who had not seen the survey previously. After any errors were fixed, the prenotification email and actual survey link emails were sent to the sample on September 12, 2013.

The survey mode was email. The university's database included email addresses for all donors who provide one, and much donor communication is conducted via email. This mode was selected because of the availability of email address information in the donor database and low cost of creating and distributing this survey (Groves et al., 2009). No cost was required to administer the email questionnaire for this survey because the researcher had access to both the email list and email administration system.

This mode should not have been susceptible to undercoverage bias concerns that are typically present when administering a survey via email. Email surveys can present issues of undercoverage of people in certain demographic groups, like those with little education, poor health, elderly, or poor economic status (Couper et al., 2007). However, university donors, by nature of the kind of donors who are able to create endowments or make philanthropic gifts, are educated, typically healthy, and wealthy. Many are elderly, but this should not cause Internet access issues because elderly donors typically have spent their lives in successful careers, which means they should be accustomed to conducting business and communicating effectively using online technology.

The email distribution followed best practices for other self-administered surveys. A prenotification email was sent to donors alerting them that they had been selected to participate

in a survey about their experiences with stewardship practices at the university. Research has found "an advance letter mailed to sample households can generate higher rates of cooperation" (Groves et al., 2009, p. 205). No incentive was offered because the topic should have been salient and important to the entire population of donors. "Without an incentive, the respondents consist of those interested in the topic" (Groves et al., 2009, p. 206). However, the entire donor population had some level of interest because they had already demonstrated their interest in the university by making a gift; therefore, there was little need to motivate donors to be interested in the topic. Selected respondents may have even viewed the experience positively because a survey showed that the university was listening to their voices, an important part of stewardship, vital to the symmetrical public relations model which emphasizes building relationships with donors (Kelly, 1991; Kelly 1998). An email containing a URL link to the survey was sent to recipients on September 19, 2013. A follow-up email was not sent because the researcher received approximately 2,000 responses to the survey in 11 days and thus did not see a need to boost response rates with a follow-up email.

Population

While the population was higher education donors, the sampling frame for this study was donors at a large research university in the northeast United States. While creating a sampling frame of donors from multiple universities could have improved generalizability of the findings, several reasons supported the use of a sampling frame of donors from one university. First, as a professional in development at this particular university, the researcher had access to the available data on all donors to and alumni from the university via its donor information database. Using information that was readily available to the researcher prevented additional fees from being levied by any information-gathering services that would have been required to create a

cross-sectional sample and prevented the hassle of negotiation with other universities. These other universities may have had incomplete records for their donors or may have been reluctant to reveal information to a fundraiser at a competing university, obstacles that may have caused delays in implementing the study and/or raised questions about the quality of the sample.

Also, when the university's donors saw a survey from a researcher of that same university, they may have been more likely to answer the questionnaire than would donors from other institutions. Studies have found that people are more likely to respond to a survey questionnaire if they have an interest in the topic or have a connection with the sponsor of the survey (Groves et al., 2009; Shropshire et al., 2009). Using a sampling frame specific to this university may have increased the likelihood of a high response rate because donors had a relationship and personal interest in the university and philanthropy to it. Sending this survey to donors from this university could have also been considered an additional form of stewardship, which emphasizes staying in communication with donors (Kelly, 1998).

Sampling

A census was taken from the sampling frame of all donors with lifetime giving of $20,000 or more as recorded in the university's donor database. Only individuals were part of the sampling frame, excluding corporations or foundations, which are also listed in the donor database. Also, only individuals who have emails listed in the university's database were included in the frame. Annual donors typically number 100,000 per year because they include anyone who has made a gift to the university under $50,000 in a given year (The University, 2013a). To make this population more manageable from a research standpoint and to ensure all donors were given an equal chance to be chosen for the study, annual giving population was defined as donors who had given $20,000 or more to the university during the course of their

lifetime but had not created any endowments. On the other hand, 2,356 donors had created

endowments at the university (A. Hopkins, personal communication, April 15, 2013), so these

donors comprised the other parts of this population (major gift donors with one endowment and

major gift donors with two or more endowments). According to this university's definition,

endowment donors must give at least $20,000 to the university to create an endowment, so their

lifetime giving to the university would be at least $20,000. This way, the annual giving and the

major gift donors were comparable because all participants have given at least $20,000 to the

university in their lifetime. They were comparable because donors at this level have similar

engagement levels and relationships with the university than donors at lower levels (like those

who give $100 a year or $1,000 lifetime). This focus allowed the researcher to more effectively

examine any differences between the annual donors, major gift donors with one endowment, and

major gift donors with two or more endowments.

The donor population information was obtained from the university's donor and

stewardship database. The researcher was able to gain the assistance of the development office to

obtain donor contact information with two stipulations: ensure confidentiality of the donor

information and do not contact donors who have previously told the university they did not want

any further communications from it. The researcher respected these two requests. The researcher

obtained the annual donor information from the university's research office whose data was

pulled from the university's donor database. The researcher obtained the information on major

gift donors with at least one endowment from the university's donor relations office whose data

was pulled from the university's stewardship donor database. Therefore, the study used contact

information that was as up-to-date and accurate as the university's own fundraising records. The

study was endorsed and approved by the university's development office, and thus donors were

contacted through the same communication channels that are used for other fundraising communications from this university.

According to the information obtained from the university's donor database, 636 donors had created two or more endowments at this university and fit the sampling frame criteria (K. Tolton, personal communication, August 26, 2013), while 1,973 had created only one endowment and fit the sampling frame criteria (K. Tolton, personal communication, August 30, 2013). Annual donors with $20,000 or more lifetime giving and no endowments who fit the sampling frame criteria numbered 5,553 (B. Laskowski, personal communication, August 22, 2013). Recent email-only surveys to donors sent by the university had been met with response rates as low as 18% for major gift donors (K. Meyer, personal communication, July 10, 2013), which is why the entire population of 8,162 donors was included in the sample.

Reliability and Validity

Because measures in this study were based on previously used measures to test OPR, stewardship, and involvement, the researcher expected them to be reliable and valid. Measures for OPR, stewardship, and involvement were multi-item measures that studies have already found to be internally reliable with Cronbach's alpha (Waters, 2009; Hon & Grunig, 1999; Zaichkowsky, 1985). Measurement validity were expected to be high because these measures had been shown to demonstrate the concepts of stewardship; OPR outcomes of trust, satisfaction, control mutuality, and commitment; and the construct of involvement (Waters, 2008; Waters, 2009; Waters, 2011; Wright & Bocarnea, 2007; Hon & Grunig, 1999; Bortree & Waters, 2010; Bortree, 2011; Zaichkowsky, 1985). The measures were also expected to have high concurrent validity, meaning the measures for stewardship and OPR in this study were expected to have similar relationships to each other and other variables as past studies conducted with these

measures (Watt & van den Berg, 1995). To see a sample of the survey instrument used in this study, please see Appendix D.

After data were collected, the first step was to assess validity of the measures used in the study. To accomplish this test, an exploratory factor analysis of correlation with principal components extraction was conducted for the stewardship variables because these variables are still in the exploratory stages of theoretical development (Stevens, 2002). Stewardship has not been tested on many different populations nor has it been widely tested in higher education donor populations, so it was important to test the validity of the stewardship strategies in this study's sample. Because OPR outcomes and involvement measures have been tested and determined to be valid in many other studies (Zaichkowsky, 1985; Bortree & Waters, 2010; Bortree, 2011; Wright & Bocarnea, 2007; Pressgrove, 2013; Hon & Grunig, 1999), confirmatory factor analysis was used to test OPR outcomes. All four factors behaved as they had in previous studies.

For stewardship, the factor analysis found that items loaded into only three factors, unlike past studies that proposed four factors for stewardship (Kelly, 1998; Kelly, 2001; Pressgrove, 2013; Waters, 2008; Waters, 2009; Waters, 2011). Items for relationship nurturing and reporting generally loaded on one factor, which was called "respect" in this study. The other two factors of reciprocity and responsibility loaded on two other separate factors. Two items ("The university informs donors about its fundraising successes" and "Because of my previous donations, the university recognizes me as a friend") did not load strongly on any one factor, and thus they were dropped from the analysis. The survey items and their primary factor loadings are listed in Table 1. After factor analysis was conducted and only three factors were found, the analysis for the

study was conducted using only three stewardship strategies: respect, reciprocity, and

responsibility.

Table 1
Stewardship Factor Loadings

Survey Item	Respect Loading	Responsibility Loading	Reciprocity Loading
Donors have confidence that the university will use their donations wisely.	**.562**	.389	.274
The university is more concerned with its fiscal health that with its relationships with donors.	**.745**	.155	.049
The university is not sincere when it thanks donors for their contributions.	**.749**	.130	.202
The university uses donations for projects that are against the will of the donor.	**.603**	.423	.090
Donors receive personalized attention from the university.	**.609**	.316	.440
Donors only hear from the university when it is soliciting for donations.	**.629**	.299	.256
The university tells donors what projects their donations will fund.	.189	**.819**	.212
The university does not provide donors with information about how their donations were used.	.334	**.753**	.120
The university considers its donors when deciding how to use their donations.	.481	**.618**	.168
The university tells donors how it has used their donations.	.304	**.760**	.281
The university invites donors to participate in special events that it holds.	.394	.263	**.509**
The university's annual report details how much money was raised in that year.	.030	.411	**.591**
The university acknowledges fundraising donations in a timely manner.	.272	.163	**.760**
The university always sends me a thank you letter for my donations.	.177	.017	**.783**

Once the factors were extracted, indexes were created for respect, responsibility, and reciprocity as well as the involvement and OPR outcomes. Cronbach's alpha was used to assess the reliability of the new scales. Each scale achieved a reliability of 0.7 or higher. See Table 2 for the indexes and their reliabilities, and see Table 3 for descriptive statistics.

Table 2
Cronbach's Alpha for Indexes

Index	Alpha score
Respect	.845
Responsibility	.868
Reciprocity	.732
Trust	.934
Commitment	.878
Satisfaction	.916
Control Mutuality	.897
Involvement	.925

Table 3
Mean and Standard Deviation for Indexes

Index	Annual Donors		Major Gift Donors, One Endowment		Major Gift Donors, Two or More Endowments	
	Mean	SD	Mean	SD	Mean	SD
Respect	4.86	1.23	5.43	1.07	5.70	1.05
Responsibility	4.54	1.40	5.40	1.17	5.76	0.92
Reciprocity	5.88	0.85	6.10	0.84	6.30	0.72
Trust	4.37	1.45	4.95	1.31	5.28	1.21
Commitment	5.09	1.43	5.58	1.22	5.83	1.13
Satisfaction	4.74	1.57	5.37	1.31	5.64	1.26
Control Mutuality	4.27	1.51	4.97	1.33	5.26	1.31
Involvement	6.08	0.99	6.20	0.87	6.37	0.74

Results

Participants

The survey was sent to 7,784 donors who met the sampling frame criteria. The survey yielded 1,709 results (1,084 from annual donors, 441 from major gift donors with one endowment, and 184 from major gift donors with two or more endowments). The simple response rate was 20.3% for annual donors (n=1,084); 23.9% for major gift donors with one endowment (n=441); and 30.4% for major gift donors with two or more endowments (n=184). The proportion of respondents from each group nearly reflects the proportion of donors in the sample. In the sample, 68% (n=5,330) were annual donors; 24% (n=1,848) were major gift donors with one endowment; and 8% (n=606) were major gift donors with two or more endowments. Of the respondents, 63% (n=1,084) were annual donors; 26% (n=441) were major gift donors with one endowment; and 11% (n=184) were major gift donors with two or more endowments.

The participants were rather homogenous, reflecting the donor profile for this university. They were primarily male (70.5%, n=1,205), white/Caucasian (94.8%, n=1,620), and over the age of 50 (86.3%, n=1,466). Many participants indicated they had made their first gift to the university decades ago, the majority stating their first gift was 20-29 years earlier (24.2%, n=414), followed by 30-39 years ago (22.2%, n=380), then 10-19 years (21.1%, n=248). The majority were also alumni of the university (79.8%, n=1,364), and thus almost all participants had an education level of a four-year bachelor's degree or higher (94.7%, n=1,610). Of those that indicated they were alumni, just over half indicated they were "very satisfied" (the highest rating) with their undergraduate experience (58.4%, n=796). A large number of participants also indicated they had family members who were currently part of the university community (64.3%,

n=1,099). Participants also reported having a high yearly household income of $200,000 or greater (40.3%, n=689), which also matched the donor profile for households that have given $20,000 or more to the university in total.

However, participants' responses about their approximate giving level or number of endowments created at the university did not match the university's records. Although donors in the sample frame were selected because their household had given $20,000 or more in total to the university, 14% of respondents (n=239) indicated they had given less than $20,000 to the university. Also, more participants reported having endowments and more participants reported having multiple endowments than the university had in their records. Anticipating potential inconsistencies, the researcher used the university's records to divide respondents into appropriate endowment categories (annual donors, major gift donors with one endowment, major gift donors with two or more endowments) and then sent each group the same survey using three unique URLs. Because all responses were anonymous, the researcher was able to distinguish responses from donors in each of the three groups based on what URL he/she responded to. The decision was made because respondents may not have remembered their giving history correctly or misunderstood the question, leading to responses inconsistent with the records. The analysis used the categories created from the university's records rather than self-report answers to ensure a more accurate analysis.

Inferential Statistics

Hypothesis 1. A two-tailed T-test to compare means was also used to address Hypothesis 1, which predicted that major gift donors with two endowments would rate OPR outcomes significantly higher than would major gift donors with one endowment. Donors with two or more endowments rated each OPR strategy higher than donors with only one endowment at the $p<.05$

level. The largest difference was for trust (m=0.33, *p*=.003) and the smallest was for

commitment (m=0.25, *p*=.017). The differences for satisfaction (m=0.27) and control mutuality

(m=0.29) were significant at *p*=.017 and *p*=.013, respectively. Hypothesis 1 was supported. See

Table 4 for results.

Table 4			
T-test Comparing Major Gift Donors with One Endowment and Major Gift Donors with Two or More Endowments on OPR Outcomes			
OPR Outcome	*T*	*df*	*p*
Trust	-2.93	623	.003
Commitment	-2.38	623	.017
Satisfaction	-2.83	623	.017
Control Mutuality	-2.49	623	.013
Note: Reported scores are for equal variances assumed.			

Hypothesis 2. Because Hypothesis 1 determined that major gift donors with one

endowment and major gift donors with two or more endowments rated OPR outcomes

differently at a level of significance, Hypothesis 2, which predicted major gift donors would rate

OPR outcomes significantly higher than annual donors, was tested using a one-way ANOVA

with Bonferri post-hoc analysis. This test was used to compare all three groups of donors (annual

donors, major gift donors with one endowment, and major gift donors with two or more

endowments) to each other. The differences between all groups were found to be significant at

the *p*<.001 level (trust $F(2, 1706)=51.23$; commitment $F(2, 1706)=36.96$; satisfaction $F(2, 1706)=47.38$; control mutuality $F(2, 1706)=60.95$). Hypothesis 2 was supported; see Table 5 for

results.

Table 5			
One-Way ANOVA for OPR Outcomes			
OPR Outcome	*F*	*df*	*p*
Trust	51.23	1708	.000
Commitment	36.96	1708	.000

| Satisfaction | 47.38 | 1708 | .000 |
| Control Mutuality | 60.95 | 1708 | .000 |

The post-hoc analysis found that each group differed except for the difference between major gift donors with one endowment and major gift donors with two or more endowments for commitment (*p*=.10), satisfaction (*p*=.11), and control mutuality (*p*=.07). For trust, these two groups were significantly different at the *p*=.02 level. When compared to annual donors, both groups were significant at *p*<.001 for each OPR outcome. While these differences were insignificant in this test, the t-test for Hypothesis 1 found that their means were significantly different at the *p*<.02 level. This ANOVA revealed that the greatest difference in means exists between the annual donors and the major gift donors (*p*<.001).

Hypothesis 3. A two-tailed T-test to compare means was also used to test Hypothesis 3, which predicted that major gift donors who have two or more endowments would rate stewardship strategies significantly higher than would major gift donors with one endowment. As predicted, donors with two or more endowments rated each stewardship strategy higher than donors with only one endowment. Each difference was significant at the *p*<.005 level. The largest difference was for responsibility (m=0.35, *p*=<.001), and the smallest was for reciprocity (m=0.2, *p*=.004). The difference for respect was m=0.28 (*p*=.003). Hypothesis 3 was supported as well; see Table 6 for results.

Table 6			
T-test Comparing Major Gift Donors with One Endowment and Major Gift Donors with Two or More Endowments on Stewardship Strategies			
Stewardship Strategy	*T*	*df*	*p*
Respect**	-2.96	623	.003
Responsibility*	-4.06	429.35	.000
Reciprocity**	-2.91	623	.004
Note: * indicates scores are for equal variances not assumed. ** indicates scores are for equal variances assumed.			

Hypothesis 4. Because Hypothesis 3 determined that major gift donors with one endowment and major gift donors with two or more endowments rated stewardship strategies differently at a significant level, Hypothesis 4, which predicted that major gift donors would rate stewardship strategies higher than would annual gift donors, was tested using a one-way ANOVA with Bonferri post-hoc analysis. As with OPR strategies, this test was used to compare all three groups of donors (annual donors, major gift donors with one endowment, and major gift donors with two or more endowments) to each other. The relationships between all groups were significant at the $p<.001$ level (respect $F(2, 1706)=64.85$; responsibility $F(2, 1706)=113.41$; reciprocity $F(2, 1706)=26.13$). Thus, Hypothesis 4 is supported; see Table 7 for results.

Table 7
One-Way ANOVA for Stewardship Strategies

Stewardship Strategy	F	df	p
Respect	64.85	1708	.000
Responsibility	113.41	1708	.000
Reciprocity	26.13	1708	.000

The post-hoc analysis found that every group differed significantly from one another. The relationships between the annual donors and the major gift donors were significant at the $p<.001$ level, as was the case with OPR outcomes. For respect, the difference between the major gift donors with one endowment and the major gift donors with two or more endowments was significant at $p=.02$; for responsibility, the difference was significant at $p=.005$; and for reciprocity, the difference was significant at $p=.01$.

Research Question 1. The first research question asked what the relationship between stewardship strategies and OPR outcomes would be for each type of donor (annual donors, major gift donors with one endowment, major gift donors with two or more endowments). This

question was answered using linear regression to test if each stewardship strategy led to each OPR outcome. Regression was run for each of the three donor groups, so relationships between stewardship strategies and OPR outcomes were tested for annual donors separately from major gift donors with one endowment and from major gift donors with two or more endowments.

For annual donors, respect was by far the strongest predictor of each OPR outcome, while responsibility and reciprocity were very weak in each case. Respect (β=.61, t(1079)=23.09), reciprocity (β=.15, t(1079)=6.03), and responsibility (β=.14, t(1079)=6.07) all significantly predicted trust at the p<.001 level with R^2=.66, F(3, 1080)=702.72, p<.001 for the model. For commitment, however, only respect (β=.61, t(1079)=26.41, p<.001) and reciprocity (β=.26, (1079)t=11.03, p<.001) significantly predicted this outcome (R^2=.63, F(2, 1081)=939.49, p<.001). All three stewardship strategies significantly predicted satisfaction, with respect being the strongest (β=.66, t(1079)=24.82, p<.001), followed by reciprocity (β=.15, t(1079)=6.51, p<.001), and responsibility (β=.07, t(1079)=2.78, p<.005), which was slightly less significant as a predictor in the model (R^2=.65, F(3, 1080)=684.40, p<.001). Last, for control mutuality, respect remains the strongest predictor (β=.69, t(1079)=27.26, p<.001), but responsibility is slightly stronger (β=.11, t(1079)=4.39, p<.001) than reciprocity (β=.09, t(1079)=3.90, p<.001), with the model R^2=.68, F(3, 1080)=773.61, p<.001. See Figure 1 for an illustration.

Stewardship Strategies

OPR Outcomes

Respect

Responsibility

Reciprocity

Trust

Commitment

Satisfaction

Control Mutuality

.61**

.61**

.14**

.07*

.11**

.15**

.26**

.66**

.15**

.69**

.09**
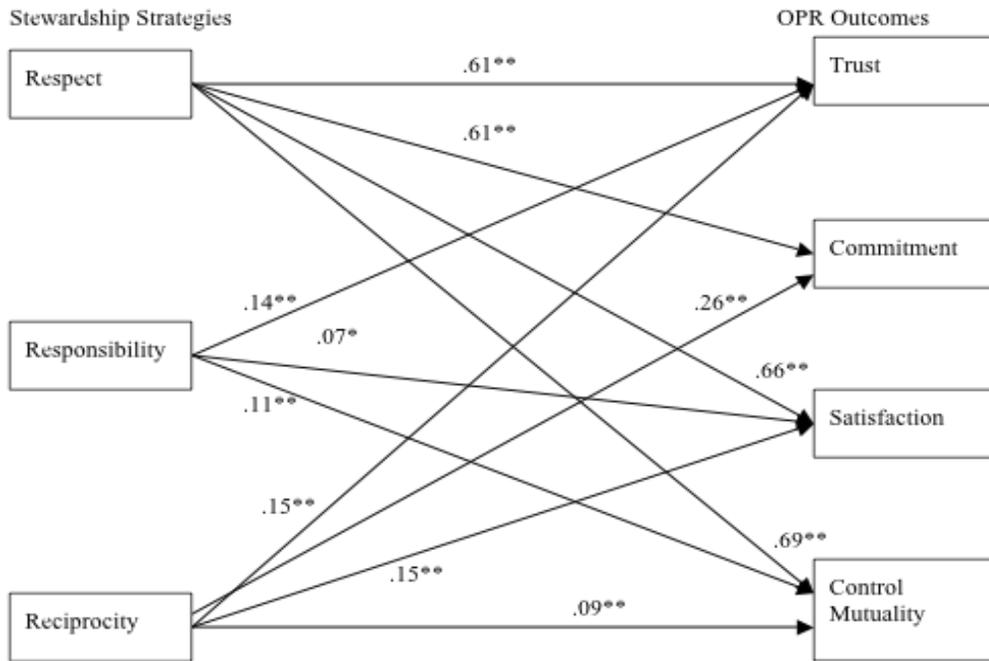
* indicates $p=.005$; ** indicates $p<.001$

Figure 1. This figure shows the relationship between stewardship strategies and OPR outcomes for annual donors. Beta scores show the strength of the relationship beside each line connecting the variables.

Similarly, for major gift donors with one endowment, respect was still the strongest predictor for OPR outcomes whereas responsibility was not a predictor at all. Reciprocity was still very weak but present. Only respect (β=.71, $t(437)$=19.78, $p<.001$) and reciprocity (β=.13, $t(437)$=3.67, $p<.001$) predicted trust, with the model R^2=.63, $F(2, 438)$=382.18, $p<.001$. For commitment, again only respect (β=.57, $t(437)$=15.48, $p<.001$) and reciprocity (β=.31, $t(437)$=8.427, $p<.001$) were predictors (R^2=.62, $F(2, 438)$=362.70, $p<.001$), but reciprocity was a bit stronger for this outcomes than the others. Respect (β=.72, $t(437)$=20.36, $p<.001$) and reciprocity (β=.13, $t(437)$=3.70, $p<.001$) also predicted satisfaction (R^2=.64, $F(2, 438)$=403.11, $p<.001$). Last, control mutuality also was only predicted by respect (β=.76, $t(437)$=21.35, $p<.001$) and reciprocity (β=.08, $t(437)$=2.11, $p<.05$) with the model R^2=.64, $F(2, 438)$=252.14, $p<.001$). See Figure 2 for an illustration.

Stewardship Strategies   OPR Outcomes

Respect   .71**   Trust

.57**

.72**

.76**

Responsibility   Commitment

.31**

Satisfaction

.13**   .13**

.08**   Control Mutuality

Reciprocity
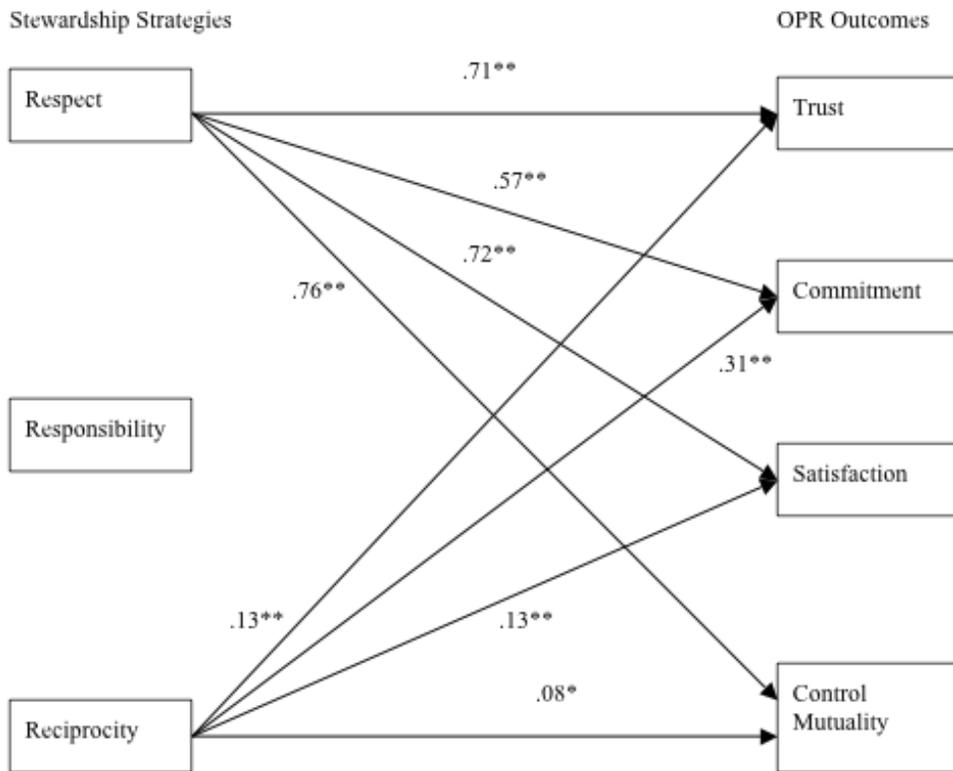
*indicates *p*<.05; ** indicates *p*<.001

Figure 2. This figure shows the relationship between stewardship strategies and OPR outcomes for major gift donors with one endowment. Beta scores show the strength of the relationship beside each line connecting the variables.

For major gift donors with two or more endowments, respect remained the strongest predictor. Respect (β=.59, t(179)=9.50, p<.001), reciprocity (β=.17, t(179)=3.01, p<.005), and responsibility (β=.14, t(179)=2.31, p<.05) all predicted trust, with respect also having the strongest relationship with trust (R^2=.67, F(3, 180)=129.83, p<.001). For commitment, only respect (β=.60, t(179)=10.70, p<.001) and reciprocity (β=.29, t(179)=5.19, p<.001) were predictors with the model at R^2=.66, F(2, 181)=178.54, p<.001. A similar relationship was found for satisfaction, where respect (β=.70, t(179)=12.56, p<.001) and reciprocity (β=.17, t(179)=3.00, p<.005) were the only predictors (R^2=.66, F(2, 181)=180.72, p<.001). However, for control mutuality, reciprocity was no longer a predictor, and respect (β=.65, t(179)=10.47, p<.001) and responsibility (β=.19, t(179)=3.12, p<.005) are the only two predictors with R^2=.63, F(2, 181)=159.68, p<.001). See Figure 3 for an illustration.

Stewardship Strategies   OPR Outcomes
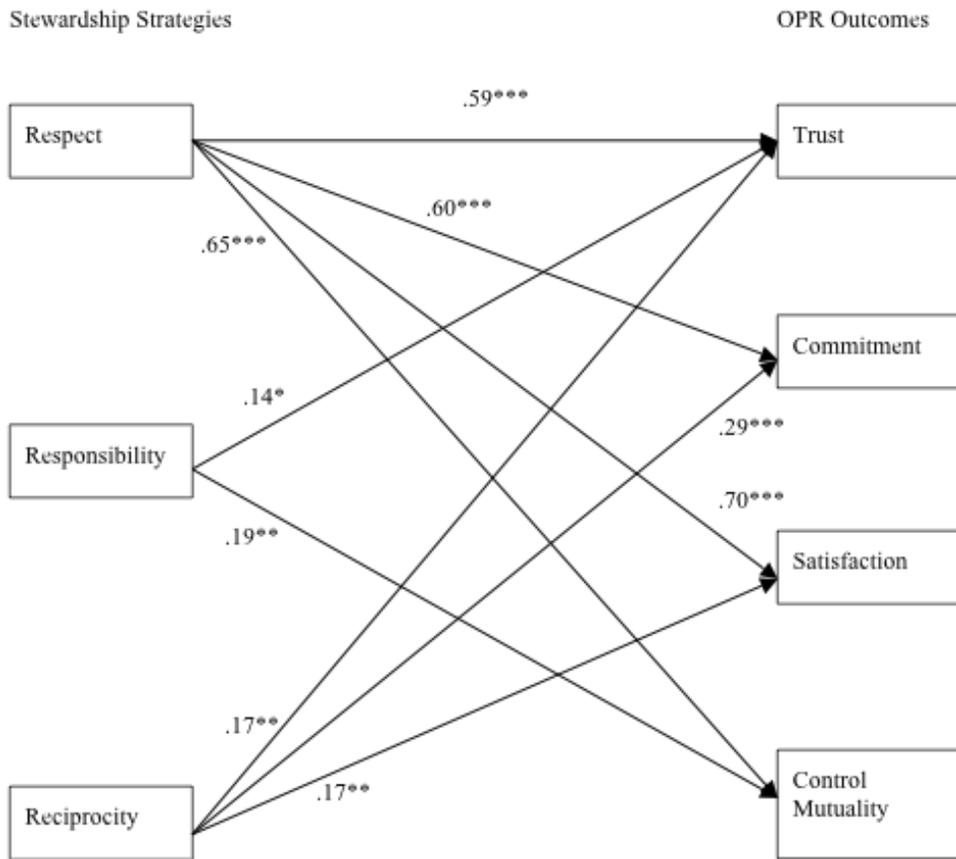
* indicates *p*<.05; ** indicates *p*<.005; *** indicates *p*<.001

Figure 3. This figure shows the relationship between stewardship strategies and OPR

outcomes for major gift donors with two or more endowments. Beta scores show the strength

of the relationship beside each line connecting the variables.

Figures 1, 2, and 3 illustrate the relationships discovered to answer Research Question 1. To answer the question for annual donors, all three stewardship strategies predict OPR outcomes of trust, satisfaction, and control mutuality, while only respect and reciprocity predict commitment. For major gift donors with one endowment, only respect and reciprocity predicted all four OPR outcomes. For major gift donors with two or more endowments, all three stewardship strategies predicted trust, while only respect and reciprocity predicted commitment and satisfaction. For control mutuality, however, only respect and responsibility predicted this outcome, a unique combination. In each relationship, however, respect was by far the strongest predictor; only once did another strategy have a beta score of .30 or higher (reciprocity and commitment for one endowment major gift donors).

Research Question 2. This question asked how involvement affected the relationship between stewardship strategies and OPR outcomes for each donor type. To explore this question, the structural equation modeling technique of path analysis was used to determine if involvement was a mediator between stewardship strategies and OPR outcomes. Path analysis was used because the study was measuring only observed variables.

In the path analysis model for involvement (default model CMIN=4.23, p=0.24, DF=3, RMSEA=.02), respect was still by far the strongest predictor of each OPR outcome (r=.62 respect-trust, r=.56 respect-commitment, r=.66 respect-satisfaction, r=.70 respect-control mutuality). Of the stewardship strategies, only respect and reciprocity loaded on involvement, and these relationships were weak (r=.29 and r=.16, respectively). Involvement also weakly loaded on three OPR outcomes of trust (r=.04), commitment (r=.16), and satisfaction (r=.07). Three relationships (responsibility and involvement; responsibility and commitment; involvement and control mutuality) were dropped from the model because the model did not

indicate a relationship existed. The path analysis found that involvement does positively add to respect's and reciprocity's relationships with trust, commitment, and satisfaction, but only slightly. Also, involvement did not explain responsibility's relationships with OPR outcomes nor did involvement contribute to relationships with control mutuality.

These results showed that involvement is not a true mediator between stewardship strategies and OPR outcomes but also showed that it does contribute some explanation to some relationships between stewardship strategies and OPR outcomes. Eveland's study of true mediation (2002) showed that a mediator must fully replace the relationships between the independent and dependent variable. In this study, involvement did not replace the relationships between stewardship strategies and OPR outcomes. Because it does contribute slightly to the relationships between stewardship strategies and OPR outcomes, involvement can be considered a moderator, or a confounding variable that slightly affects the relationship between stewardship strategies and OPR outcomes, as defined by Watt and van den Berg (1995). In other words, involvement does add some further explanation to the relationships between respect and reciprocity on trust, commitment, and satisfaction, but it is not very useful to help us explain the overall model of stewardship strategies and OPR outcomes. See Table 8 for results of the path analysis and Figure 4 for an illustration of the model for involvement as a moderator.

Table 8

Path Analysis of Involvement as Moderator of Stewardship Strategies and OPR Outcomes

Relationship	Parameter Estimate	Standard Error	*p* value
Respect –> Involvement	.23	.02	<.001
Respect –> Trust	.73	.02	<.001
Respect –> Commitment	.64	.02	<.001
Respect –> Satisfaction	.83	.03	<.001
Respect –> Control Mutuality	.87	.03	<.001
Reciprocity –> Involvement	.18	.03	<.001
Reciprocity –> Trust	.22	.03	<.001
Reciprocity –> Commitment	.39	.03	<.001
Reciprocity –> Satisfaction	.24	.03	<.001
Reciprocity –> Control Mutuality	.15	.03	<.001
Responsibility –> Trust	.13	.02	<.001
Responsibility –> Satisfaction	.06	.02	.002
Responsibility –> Control Mutuality	.10	.02	<.001
Involvement –> Trust	.07	.02	<.001
Involvement –> Commitment	.24	.02	<.001
Involvement –> Satisfaction	.11	.02	<.001

Respect

Responsibility

Reciprocity

e1

e2

e3

Involvement

e4

Trust

Commitment

Satisfaction

Control Mutuality

e5

e6

e7

e8

.29

.12

.16

.09

.05

.66

.24

.13

.13

.08

.62

.70

.07

.16

.56

.04
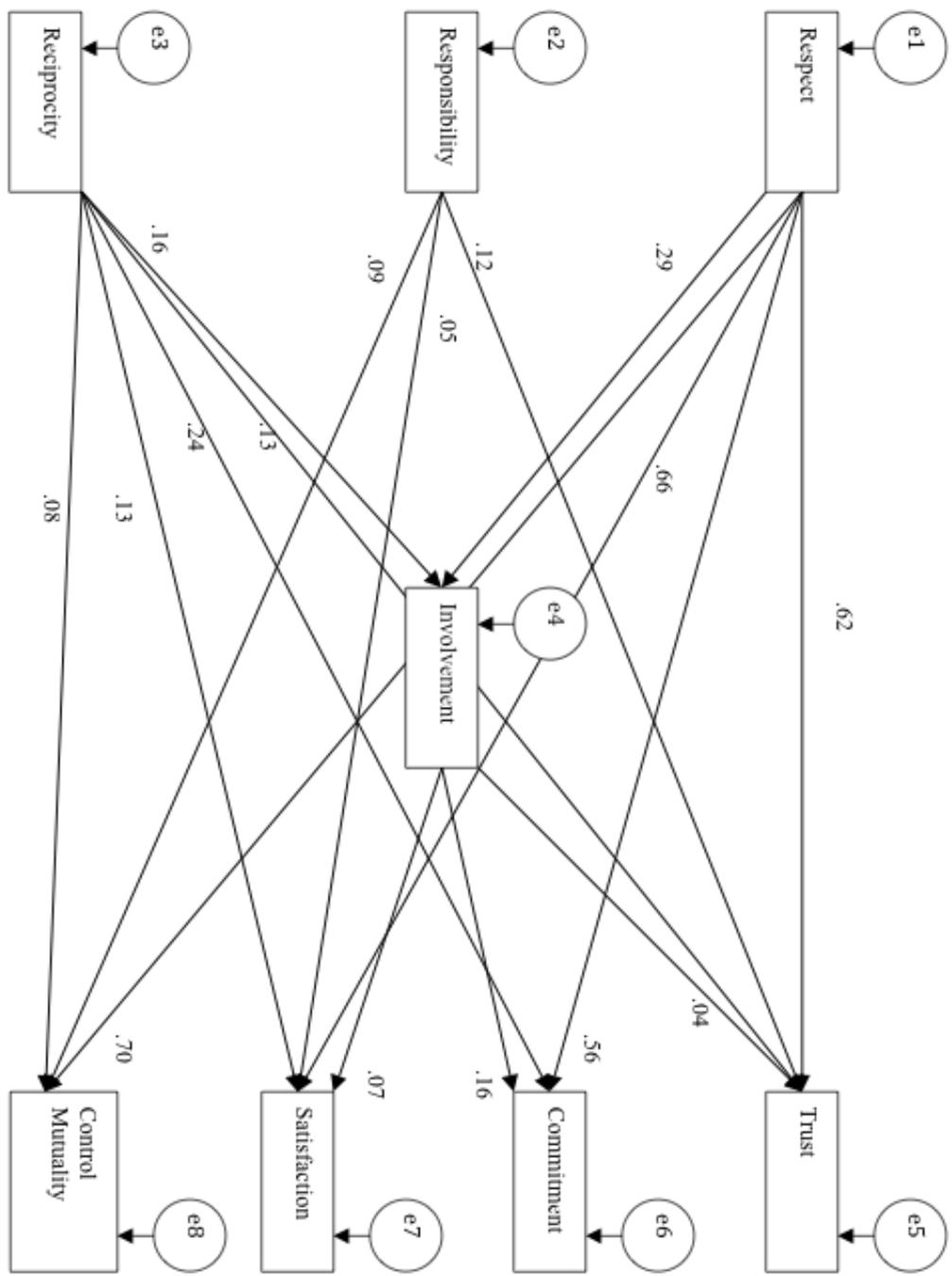
Figure 4. This figure illustrates the path analysis model for involvement as a moderator for stewardship strategies and OPR outcomes. Standardized regression weights are written beside the line indicating the relationship.

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To further understand how involvement can explain the relationship between stewardship strategies and OPR outcomes, a second path analysis was performed without including involvement as a moderator. This model examined all of the relationships between stewardship strategies and OPR outcomes in one model (default model CMIN=1.23, p=0.27, DF=1, RMSEA=.01). Results of this test showed that this model without involvement was a slightly better fit for the data than the one with involvement. The goodness of fit index (GFI), the noncentrality parameter (NCP), and the root mean square error of approximation (RMSEA) indicated that the model without involvement was a slightly better fit (Raykov & Marcoulides, 2000): without involvement default model GFI=1.00 and with involvement default model GFI=0.99; without involvement default model NCP=0.23 and with involvement default model NCP=1.23; default model with involvement RMSEA=.02 and without involvement RMSEA=.01. One relationship (responsibility and commitment) was not significant and was dropped from further analysis, as it was from the model with involvement.

When comparing factor loadings from the model with involvement to the model without involvement, we see involvement contributing to the relationships between respect and its OPR outcomes the most. Respect's effect on commitment as measured by r is higher by almost 0.05 when the model does not include involvement, the relationship with the greatest difference between the two models (r=.56 with involvement, r=.61 without involvement). Almost every relationship in the model is higher without involvement, except for respect on control mutuality, where the r value decreased by 0.001 without involvement (r=.708 with involvement, r=.707 without involvement). Only reciprocity's effect on control mutuality and responsibility's effect on satisfaction remained the same between the two models (r=.08 for reciprocity-control mutuality and r=.05 for responsibility-satisfaction). While these differences are not large, this

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comparison shows that involvement did contribute some explanation to many relationships in the

model, particularly respect's influence on OPR outcomes. Because these differences are not large

in value, however, this comparison is just another way to confirm that involvement does not help

explain much about the relationships between stewardship and OPR outcomes. A model without

involvement at all is actually a better explanation for the relationships between stewardship

strategies and OPR outcomes. See Table 9 for results of the path analysis for stewardship

strategies and OPR outcomes. See Figure 5 for the illustration of the path analysis for

stewardship strategies and OPR outcomes.

Table 9
Path Analysis of Stewardship Strategies and OPR Outcomes

Relationship	Parameter Estimate	Standard Error	p value
Respect –> Trust	.75	.02	<.001
Respect –> Commitment	.69	.02	<.001
Respect –> Satisfaction	.85	.03	<.001
Respect –> Control Mutuality	.87	.03	<.001
Reciprocity –> Trust	.24	.03	<.001
Reciprocity –> Commitment	.44	.03	<.001
Reciprocity –> Satisfaction	.26	.03	<.001
Reciprocity –> Control Mutuality	.15	.03	<.001
Responsibility –> Trust	.13	.02	<.001
Responsibility –> Satisfaction	.06	.02	.002
Responsibility –> Control Mutuality	.10	.02	<.001

Reciprocity

Responsibility

Respect

.14

.12

.09

.71

.05

.08

.14

.27

.68

.61

.63

Control Mutuality

Satisfaction

Commitment

Trust
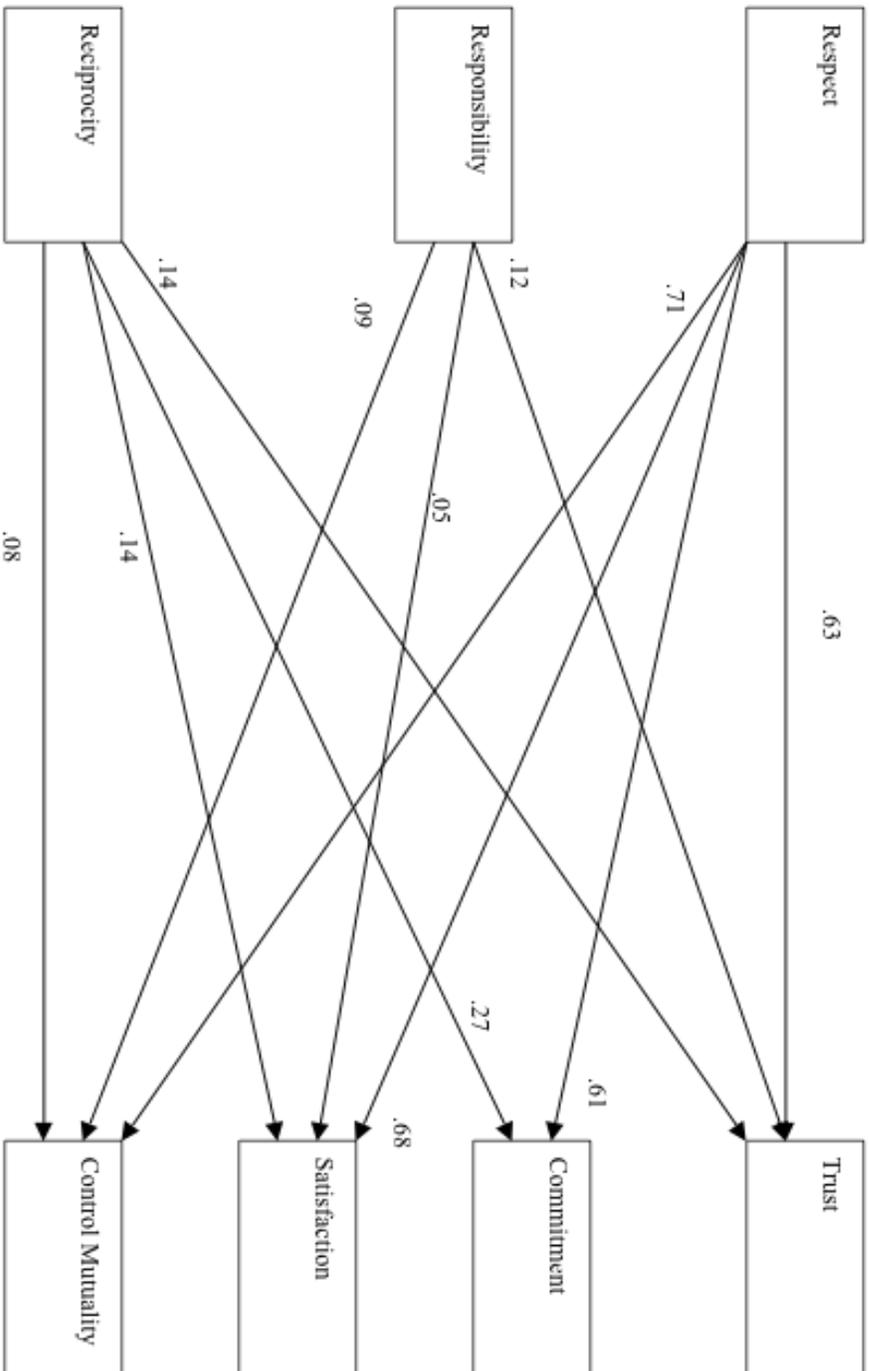
Figure 5. This figure illustrates the path analysis model for stewardship strategies and OPR outcomes. Standardized regression weights are written beside the line indicating the relationship.

Discussion

This study sought to explore public relations fundraising theory by examining organization-donor relationships in higher education. The study looked at the relationship between stewardship strategies, OPR outcomes, and involvement for three groups of donors: annual donors, major gift donors with one endowment, and major gift donors with two or more endowments. Donors who had given at least $20,000 in their lifetime to a large university in the northeastern United States were sent an email questionnaire about their relationship with the institution as a donor. Results supported previous research that found that stewardship strategies positively affected OPR outcomes and that major gift donors rate these strategies and outcomes higher than annual donors. The study also found that stewardship consists of only three strategies (respect, responsibility, and reciprocity) and that respect may actually have the strongest relationship with OPR outcomes for higher education donors. The study also found that involvement has only a slight influence on the stewardship-OPR outcomes relationship and thus is not a mediator of the relationship for higher education donors.

Summary of Findings

Based on factor analysis, this study proposes a new strategy called respect, which merges the strategies of reporting and relationship nurturing. According to the factors that made up the concept in this study, respect means the organization uses donations wisely, is concerned with the donor more than its fiscal health, is sincere when thanking the donor, uses donations as the donor intends, provides the donor with personalized attention, and communicates with the donor when not soliciting for more donations. This new strategy accompanies the previously suggested strategies of responsibility and reciprocity. Because this is one of the first such studies applied to higher education donors, this study suggests that higher education donors may require a different

set of stewardship strategies to maintain and nurture their relationships with higher education institutions than previously suggested. Previous studies suggested four distinct stewardship strategies (reciprocity, responsibility, reporting, and relationship nurturing) to maintain donor relationships with an organization (Kelly, 1998; Kelly, 2001; Pressgrove, 2013; Waters, 2008; Waters, 2009; Waters, 2011), but this study found that only three such strategies were present in the higher education donor-organization relationship.

Another important finding is the strength of respect's influence on OPR outcomes. Respect was by far the strongest predictor of each OPR outcome for annual donors, major gift donors with one endowment, and major gift donors with two or more endowments. Respect's beta scores in predicting OPR outcomes ranged from β=.59 to β=.76, while reciprocity or responsibility reached the threshold of β=.3 only once (reciprocity predicting commitment for major gift donors with one endowment). Respect may be the strongest of the three predictors because of the nature of higher education donors' relationships with their institutions, particularly those giving $20,000 or more as in this study. This giving level represents a significant investment in an organization, and thus donors may feel the institution should give them a high level of attention and respect in return. Also, this population was comprised mostly of alumni from this institution, and college alumni feel a very strong connection to their alma mater. Because this population feels a strong positive connection to their alma mater as alumni, as donors, then, they would value respect from their alma maters in return.

Conversely, responsibility had very little effect on OPR outcomes, predicting no OPR outcomes for major gift donors with one endowment. Responsibility may not have as strong an influence in the higher education donor population because of the very strict laws governing how these institutions can use their donations, particularly for donors who create endowments. When

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donors create an endowment, they and the institution sign guidelines stipulating exactly how the university can use the funds. The university may not use the funds for any other purpose without the donor's consent and a revision of the signed guidelines. Because these safeguards are in place, donors may not feel concerned that the institution would use the funds irresponsibility and thus the stewardship strategy of responsibility has little influence on a donors' relationship with the university.

Responsibility is a predictor of trust, satisfaction, and control mutuality for annual donors, however, because they do not necessarily sign agreements stipulating exactly how the university uses their donations. If the institution demonstrates responsibility to them, they may feel more inclined to trust the institution, be satisfied with it, and feel that there is shared control of the relationship. For major gift donors with two or more endowments, responsibility also predicts trust and control mutuality. On this end of the spectrum, donors who invest significant amounts of money to create two or more endowments would value responsibility because the institution is showing that it is using their donations wisely. Even though these donors also have signed endowment guidelines with the university, donors may be more concerned about the use of their funds because of the larger amount of money involved. Responsibility, then, would build the donor's trust in the institution and feelings of shared control in the relationship when the institution follows the donor's wishes.

While respect was the strongest predictor for all OPR outcomes and responsibility was sometimes absent, reciprocity was found to be a predictor of every OPR outcome for annual donors and major gift donors with one endowment. This relationship—although weaker than respect—reflects donors' appreciation of the institution acknowledging their donations and showing them gratitude at every giving level. When donors feel appreciated, every aspect of the

organization-donor relationship is strengthened. Reciprocity also predicted three outcomes for major gift donors with two or more endowments, reflecting how showing thanks at this giving level also boosts donors' feelings of trust, commitment, and satisfaction with the organization.

The only place where this relationship seems to disappear is in predicting control mutuality for major gift donors with two or more endowments. Responsibility was found to predict control mutuality for major gift donors with two or more endowments while reciprocity did not. The reversal of these two strategies may be because major gift donors with two or more endowments are typically the institution's highest-level donors. Because their gifts to the institution involve a significant amount of money, they may value the institution's responsibility for their donations over being thanked for their contributions. This relationship may be present for control mutuality because donors at this level may also be concerned about the institution using their funds as they intended, particularly because they have given so much to the institution. If the institution is responsible with the large gifts, this would positively influence the donor's feelings that they have shared control for the use of the funds and thus positively increase their feelings about the organization-donor relationship. On the other hand, thanking donors would not necessarily mean that the institution is providing shared control of their donation funds and thus would not lead to stronger feelings of control mutuality in the relationship. Thus, as donors give more money, they will more strongly value control mutuality outcome of their relationship.

While respect is the strongest predictor, it loads most strongly on control mutuality of all the OPR outcomes (β=.69 for annual donors, β=.76 for major gift donors with one endowment, and β=.65 for major gift donors with two or more endowments), and its direct relationship in the model is the strongest of all (r=.70). This finding suggests that for donors to feel that the

institution is providing shared governance of their donation funds, respect is the best strategy. It also shows that respect is most important to building the outcome of control mutuality than it is to building the other three strategies. This relationship makes logical sense. Donors want to feel as if they still have a say in the way their funds are used even after giving them to the higher education institution. Showing respect for the donor and his or her wishes for the use of those funds would demonstrate shared control of the gift between the donor and institution.

Another significant finding is that the concept of involvement does little to explain the stewardship strategies-OPR outcomes model found in this study. Involvement did contribute some positive influence to the relationships between respect and trust, commitment, and satisfaction and reciprocity and trust, commitment, and satisfaction, but the contribution was minimal. (Involvement's regression weights on these three OPR outcomes were no greater than $r=.16$.) Because stewardship strategies still exerted a direct influence on the four OPR outcomes after involvement was included in the model, this study shows that involvement may not add much explanation to the positive relationship seen between stewardship strategies and OPR outcomes. This finding is particularly important for higher education fundraising because it reveals that even when donors feel closely involved with their institutions, stewardship seems to be the more suitable explanation for positive organization-donor relationships than the donor's perceived involvement with the institution.

Theoretical Implications

This study found that major gift donors rated these four outcomes significantly higher than annual donors did. Additionally, this study further extended this theory by suggested major gift donors with two or more endowments rate these outcomes significantly higher than major gift donors with one endowment, suggesting that differences exist even within the overall group

of major gift donors. These findings support other public relations theory that building positive OPR outcomes may lead to customer and donor retention and increased giving (Bruning, 2002; Bruning & Hatfield, 2004; Bruning et al., 2004; Bruning et al., 2006; Waters, 2011; Wright & Bocarnea, 2007). Previous studies found that major gift donors rated all four OPR outcomes (trust, commitment, satisfaction, control mutuality) significantly higher than annual donors did (Waters, 2008; Waters, 2011).

This study supported these findings that stewardship strategies positively predict OPR outcomes, but it questioned the four distinct strategies developed by Kelly (1998, 2001). A factor analysis in this study found that reporting and relationship nurturing could be collapsed into one factor called respect, and thus only three stewardship strategies were needed to predict the four OPR outcomes. Unlike previous studies that found relationship nurturing was the strongest predictor of OPR outcomes (Pressgrove, 2013; Waters, 2009; Waters, 2011), this study found that respect was the strongest predictor of OPR outcomes. This finding indicates that perhaps the four stewardship strategies previously suggested should be better defined. Previous studies on stewardship found that the stewardship strategies of reciprocity, responsibility, reporting, and relationship nurturing predict OPR outcomes (Waters, 2008; Waters, 2009; Waters, 2011).

As with OPR outcomes, this study found that major gift donors with two or more endowments also rated stewardship strategies higher than major gift donors with one endowment, suggesting differences exist even within the major gift donor category. These findings support Kelly's theory that stewardship is an important part in the fundraising process and may help lead donors to future giving and increased giving (Dunlap, 2002; Kelly, 2008; Kelly, 2001; Schroder, 2002). Previous studies also found that major gift donors rated

stewardship strategies significantly higher than did annual donors (Waters, 2008; Waters, 2009; Waters, 2011).

Unlike these previous studies, this study found that involvement did not have a strong influence on the relationship between stewardship strategies and OPR outcomes and thus could only be considered a moderator and not a mediator of the relationship. This finding partly supports previous theory that involvement has some positive influence on donors' relationship outcomes with their alma maters and may lead to alumni gifts after graduation (Lindhal & Conley, 2002; Monks, 2007; Weerts & Ronca, 2007; Monks, 2002; Sun et al., 2007; Baade & Sundberg, 1993; Baade & Sundberg, 1996; Stutler & Calvario, 1996). However, the present findings also suggests that involvement does not contribute much to building the organization-donor relationship in higher education and does not challenge the theory that stewardship strategies alone lead to higher OPR outcomes. In previous studies in marketing and public relations, involvement was defined broadly as feeling a level of investment with a product (Zaichkowsky, 1985). In higher education, several studies defined involvement as being invested in an institution, and they found that involvement with an institution make alumni more inclined to give to their institution after graduation. Studies defined involvement in various ways, including being involved with one's alma mater after graduation (Lindhal & Conley, 2002; Monks, 2007; Weerts & Ronca, 2007) or being involved when an undergraduate student (Monks, 2002; Sun et al., 2007; Baade & Sundberg, 1993; Baade & Sundberg, 1996; Stutler & Calvario, 1996; Lindahl & Conley, 2002). Other studies found that involvement was a mediator between relationship maintenance strategies and outcomes (Bortree & Waters, 2010) as well as relationship antecedents and outcomes (Bortree, 2011) in volunteer-organization relationships. The present study did not match these results.

Practical Implications

This study has important practical implications for higher education fundraising professionals. First, the findings of this study reinforce the importance of practicing stewardship regularly for any level donor in higher education fundraising programs. The results of this study reinforced the idea that donors who create endowments feel more positively about their relationship with the institution. The study also found that donors who create endowments value stewardship more positively; thus, stewardship should not stop or decrease after donors create endowments or increase their giving to the institution. Stewardship may even continue to enhance donors' relationships with the institution as they move to the highest giving level (in this study, major gift donors with two or more endowments). This study suggests that higher education fundraising programs should institute a stewardship plan for donors at every level to help increase donors' positive feelings about their relationship with the institution.

Fundraising professionals who wish to strengthen donors' relationships with the university should focus on the stewardship strategy of respect. In this study, respect was the strongest predictor of OPR outcomes for every giving level and was the strongest predictor of OPR strategies in the model for all donors. The strength of this relationship would indicate that donors most value respect from the institution as a way to build its feelings of trust, satisfaction, commitment, and control mutuality. Increasing these positive feelings about the institution may help deepen the organization-donor relationship and thus lead the donor to continue making gifts to the institution and possibly increasing their giving amount.

Similarly, this study indicated that fundraising professionals should also focus on reciprocity as an important strategy for building relationships for donors at all giving levels. Although weaker than respect, reciprocity was an important predictor of many OPR strategies in

this study. This finding would indicate that fundraising professionals should thank donors for every kind of gift, no matter if they are major gift donors with multiple endowments or annual donors who do not have any endowments. It reinforces the idea that donors do not tire of hearing "thank you" for their gifts and that the act of thanking a donor may even deepen the organization-donor relationship and could lead to continued or increased giving.

Fundraising programs would be wise to invest in a strong stewardship program if it wishes to strengthen donors' relationships with the institution. This study demonstrated that stewardship strategies are stronger predictors of relationship outcomes than donors' involvement with the institution, challenging the notion that building involvement with an institution is the best way to strengthen donors' relationship. This does not mean that involvement does not add to the organization-donor relationship; this study found that involvement did slightly explain the stewardship-OPR outcome model. However, the strongest predictors of OPR outcomes were stewardship strategies without involvement. This study indicates fundraising programs should focus its resources on building a strong stewardship program over initiatives to build involvement.

Limitations

The findings of this study cannot be generalized outside the population and environment tested in this study (donors of $20,000 or more to this one large institution in the northeastern United States).

This study was conducted at a major research university that was still dealing with the aftermath of a major administrative crisis that occurred only two years prior. Given this context, the study provides important insights into crisis communication theory. In the aftermath of a crisis, this study suggests that respect, reciprocity, and responsibility are crucial strategies for

fundraisers to use to continue building their relationships with donors, whose views of the institution may have been affected by the crisis. Because all of the relationships found in the study were positive, it suggest that these strategies would help improve any damaged relationships with donors. The study also suggests that keeping donors involved with the institution—before and after the crisis—may add some additional strength to the organization-donor relationship. However, generalizability is also affected because of the situation in which the study was conducted. The findings of this study may be influenced by donors' feelings about the recent crisis and may therefore be unique to this institution's situation at the time the study was conducted.

This study conducted a census of donors who had given $20,000 or more during their lifetimes to the institution because the population was manageable in size (approximately 8,000 individuals) and would allow for the highest response rate possible. A census requires that every person in a population is included, and the possibility always exists that individuals who should have been included were not (Groves et al., 2009). Data provided by the university could have errors that would have prevented the study from not sending a questionnaire to individuals that fit the population's criteria. However, the researcher has no reason to believe that any donors were omitted from the census who should have been included.

The questionnaire asked respondents to indicate how many endowments they had at the university (none, one, or two or more). When analyzing the results, the researcher found that some respondents did not indentify themselves as having the same amount of endowments as the university's records indicated. (While the researcher could not match one response with a specific person, the total responses in each category were not equal to the totals provided by the university.) However, the researcher anticipated that donors' responses may not have matched

university records exactly, so the email questionnaire was distributed using three different links: one for annual donors, one for major gift donors with one endowment, and one for major gift donors with two or more endowments, according to the university's records. Responses were therefore grouped into these three categories for analysis after discovering the discrepancies with the self-report responses. The categories determined by the university's records were used for analysis because this data should be more accurate than the respondents' self-reports. Also, the level of stewardship a donor receives for his/her giving is based on the university's records. Because this study was examining stewardship, it was logical to group donors according to their stewardship level at the university.

This questionnaire in this study contained questions adapted from measures previously tested in a nonprofit fundraising environment. These questions referred to "the university," but it may have confused some respondents, as was indicated by feedback from respondents to the researcher. Some respondents indicated they felt differently about "the university" than they felt about the college or program they have given money to at the university, and thus they were not sure if they should answer the questions about "the university" overall or about the unit to which they had the donor relationship. Perhaps the questions could have been worded to focus on one area of the university, or the researcher could have categorized donors according to what units benefited from their giving when sending out the questionnaire. However, the goal of this study was to assess the donors' relationships at the university-wide level, and the results of this study do not indicate this confusion affected the findings.

Similarly, this study sought to examine respondents' relationships with the university as donors. However, donors to a major research university like the one in this study also have other roles as members of the university community. Some respondents who were also faculty or staff

at the university indicated they were not sure how to answer some of the questions in the survey because they see the university as both an employer and beneficiary of their giving. An additional question could have asked respondents to indicate these other relationships, or the researcher could have categorized respondents according to their additional roles in the university community when sending out the questionnaire. However, this study was to look at organization-donor relationships only, and analysis did not indicate this confusion affected the results of the study.

Future Research

To test the new proposed stewardship model of respect, reciprocity, and responsibility, more tests with other higher education populations will need to be conducted. These findings will determine if higher education donors are explained with the revised stewardship model proposed by this study or if these findings are unique to this donor population. Studies should not only be replicated in similar populations (donors of $20,000 or more to large public research universities) but also in different higher education donor populations at small private institutions, large private institutions, historically black (HBCU) institutions, community colleges, and religiously affiliated institutions. These other types of institutions could follow similar or different patterns for giving as the one in this study, thus advancing fundraising theory for all types of higher education donors.

While this study informs crisis communication, this connection is made only because of the situation of the institution being studied. Additional studies on how to communicate with donors during and after an organizational crisis would be valuable to inform both crisis communication theory and fundraising communication theory, and help guide fundraising professionals who must retain donors during these crises. Future studies could incorporate

additional variables informed by crisis communication theory, study other universities dealing with crises, or conduct longitudinal studies of institutions before, during, and after crises. These additional studies could confirm or revise the respect, reciprocity, and responsibility model of stewardship in post-crisis communication theory and practice.

Future studies could also examine how involvement influences organization-public relationship outcomes directly for higher education donors. This study determined that involvement does not help explain the relationship between stewardship strategies and OPR outcomes, but perhaps involvement would be a strong predictor of OPR outcomes on its own. Future studies could see if stewardship strategies are mediators of this relationship.

Conclusion

As fundraising becomes increasingly important to the longevity and financial health of U.S. nonprofit organizations—particularly the nation's higher education institutions—understanding donor behavior is becoming increasingly important to the success of these organizations. This study sought to address this critical need for fundraising research, particularly in the field of public relations, where fundraising—the act of building relationships with donors—is a natural fit. Understanding how organizations can retain donors to their organization is an important way to ensure the long-term success of the organization, and research on this topic will help fundraisers become better relationship managers. By showing how stewardship strategies can positively influence donors' relationships with a higher education institution, this study helped to add new knowledge to the scholarship that exists on fundraising. This information helped to fill this gap in scholarly research as well as to produce useful knowledge for fundraising practitioners so they can do their jobs more effectively and can treat their donors more appropriately.

To better understand donor behavior, this study examined how stewardship strategies can impact OPR outcomes and how involvement plays a role in this relationship. It showed that stewardship is powerful influencer of OPR outcomes and that involvement does not seem to add much to these relationships. Its findings suggested several important implications for theory and practice. First, this study proposes a new model of stewardship strategies, reducing the number from four to three and introducing a new concept called respect. This study also confirms previous theory that stewardship is a powerful way to build relationships with donors. It also showed that major gift donors who have created endowments experience stewardship and relationship outcomes more positively than annual donors. It also reveals that stewardship

strategies may be the best way to increase these outcomes, even more than donors' involvement with the institution.

As higher education professionals navigate an increasingly competitive fundraising environment, the insights provided by this study may help them retain and find new donors for their institutions. This study reinforced the idea that stewardship is the essential feedback loop that builds donors' affinities for higher education institutions and motivates continued giving. It revealed that respect for these donors is the best strategy for fundraisers to use when building these lasting relationships. Those institutions that invest in stewardship programs that use the strategies of respect, reciprocity, and responsibility may have the advantage in building dedicated donor bases that will provide them with the funds needed to sustain and expand their educational missions. With dedicated donors, these institutions would have the ability to become philanthropic leaders in higher education—and even outlast the crises that may come their way.

Appendix A

Organization-Public Relationship Outcomes, According to Relationship Management Theory

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                        ┌─────────────────┐
                        │ Organization-   │
                        │ Public          │
                        │ Relationship    │
                        └─────────────────┘
            ┌──────────────┬──────┴───────┬──────────────┐
    ┌──────────┐    ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
    │  Trust   │    │  Commitment  │  │ Satisfaction │  │  Control     │
    │          │    │              │  │              │  │  Mutuality   │
    └──────────┘    └──────────────┘  └──────────────┘  └──────────────┘
```

Appendix B

Relationship Maintenance Strategies Comprising Stewardship

Appendix C

Hypothesized Model of Stewardship Strategies and OPR Outcomes

Independent Variable	Mediator	Mediator	Dependent Variable
Annual donors	Stewardship strategies	Involvement	OPR outcomes
Major gift donors, one endowment	Stewardship strategies	Involvement	OPR outcomes
Major gift donors, two or more endowments	Stewardship strategies	Involvement	OPR outcomes
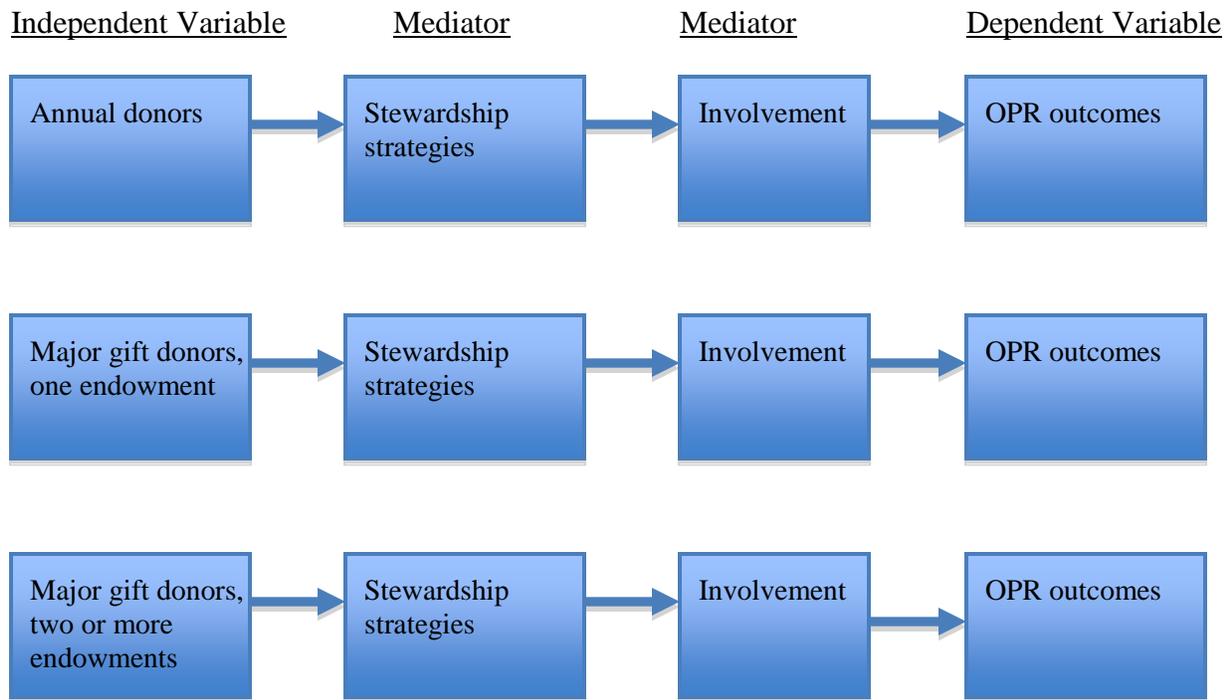
Donor Survey Instrument Example

OPR Outcome Scales (adapted from Hon & Grunig, 1999, p. 28-29)

Instructions: Rate how strongly you agree or disagree with the following statements.

<u>Trust</u>
The university treats people like me fairly and justly. (integrity)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Whenever the university makes an important decision, I know it will be concerned about people
        like me. (integrity)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university can be relied on to keep its promises. (dependability)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

I believe that the university takes the opinions of people like me into account when making
        decisions. (dependability)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

I feel very confident about the university's skills. (competence)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university has the ability to accomplish what it says it will do. (competence)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

<u>Control Mutuality</u>
The university and people like me are attentive to what each other say.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university believes the opinions of people like me are legitimate.
Strongly   Strongly

disagree   agree
1   2   3   4   5   6   7

In dealing with people like me, the university has a tendency to throw its weight around.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university really listens to what people like me have to say.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Commitment
I feel that the university is trying to maintain a long-term commitment to people like me.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

I can see that the university wants to maintain a relationship with people like me.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

There is a long-lasting bond between the university and people like me.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Compared to other organizations, I value my relationship with the university more.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Satisfaction
I am happy with the university.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Both the university and people like me benefit from the relationship.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Most people like me are happy in their interactions with the university.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Generally speaking, I am pleased with the relationship the university has established with people like me.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Stewardship Strategy Scales (adapted from Waters, 2009, p. 116)

Reciprocity
The university acknowledges fundraising donations in a timely manner.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university always sends me a thank you letter for my donations.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university is not sincere when it thanks donors for their contributions. (reverse)

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Because of my previous donations, the university recognizes me as a friend.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Reporting
The university informs donors about its fundraising successes.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university tells donors how it has used their donations.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university's annual report details how much money was raised in that year.

Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university does not provide donors with information about how their donations were used.
        (reverse)

Strongly   Strongly
disagree   agree

70

1   2   3   4   5   6   7

Responsibility
The university considers its donors when deciding how to use their donations.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university uses donations for projects that are against the will of the donors. (reverse)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Donors have confidence that the university will use their donations wisely.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university tells donors what projects their donations will fund.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Relationship nurturing
Donors only hear from the university when it is soliciting for donations. (reverse)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university is more concerned with its fiscal health than with its relationships with donors.
        (reverse)
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Donors receive personalized attention from the university.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

The university invites donors to participate in special events that it holds.
Strongly   Strongly
disagree   agree
1   2   3   4   5   6   7

Involvement (scale adapted from Zaichkowsky, 1985, p. 349-350)

Instructions: Please choose the box closest to the term that most appropriately describes your feelings about the university.

The University
important ___:___:___:___:___:___:___ unimportant*
of no concern ___:___:___:___:___:___:___ of concern to me
means a lot to me ___:___:___:___:___:___:___ means nothing to me*
valuable ___:___:___:___:___:___:___ worthless*
matters to me ___:___:___:___:___:___:___ doesn't matter*
significant ___:___:___:___:___:___:___ insignificant*
essential ___:___:___:___:___:___:___ nonessential*
not needed ___:___:___:___:___:___:___ needed

*indicates item is reverse scored

Giving History Questions

Instructions: Choose which answer best describes you.

Approximately how much money have you given the university over your lifetime, including endowments (permanent, invested financial funds)?
$0 to $999
$1,000-$9,999
$10,000-$19,999
$20,000-$99,999
$100,000-$249,999
$250,000-$999,999
$1,000,000-$4,999,999
$5,000,000 or more

How many endowments (permanent, invested financial funds) have you created at the university?
0 endowments
1 endowment
2 or more endowments

Approximately how many years ago did you make your first gift to Penn State?
50 or more
30-49
20-39
10-19
9 or less

University-Specific Questions

Do you receive the university's annual report on philanthropy and endowments?
Yes
No

Don't know

Are you an alumnus/a of the university?
Yes
No
Don't know

If you answered "No" to the previous question, skip to question x.

How satisfied were you with your student experience at the university? (based on Monks, 2003)

Very dissatisfied						Very satisfied
1	2	3	4	5	6	7

Do you have family members who were or currently associated with the university?
Yes
No
Don't know

Demographic Questions

Instructions: Choose which answer best describes you. (Respondents will select a radio button next to each answer.)

What is your age?
Under 20
20-29
30-39
40-49
50-59
60-69
70-79
80-89
90-99
Over 100
Decline to answer

What is your gender?
Male
Female
Decline to answer

What is your race?
American Indian/Alaskan Native.
Asian or Asian American (including individuals with family origins in India)
Black or African American.
Native Hawaiian or other Pacific Islander.

White or Caucasian American.
Other
Decline to answer

What is your ethnic origin?
Hispanic or Latino
Not Hispanic or Latino
Decline to answer

What is the highest level of education you have completed?
Less than high school
High school
Some college
2-year associate degree
4-year bachelor's degree
master's degree
advanced professional degree (MD/JD) or doctoral degree (PhD)
Decline to answer

Approximately what is your yearly household income?
$49,999 or less
$50,000-74,999
$75,000-99,999
$100,000-124,999
$125,000-149,999
$150,000-174,999
$175,000-199,999
$200,000 or greater
Decline to answer

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