

A Thesis

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Donor Perceptions of Cultivation and Stewardship at Lourdes University

by

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Submitted to the Graduate Faculty as partial fulfillment of the requirements for the

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Donor cultivation and retention is vital to the continued success of higher education institutions, especially at a time when tuition is on the rise and state funding continues to decrease. Mid-range donors are the future of major gifts, thus it is vital for institutions to have an adequate understanding of their giving influences and patterns. This research solicited mid-range donors for their perceptions on cultivation and stewardship practices at Lourdes University. An electronic survey was distributed to 275 individuals who were identified by Lourdes University as mid-range donors. Fifty-three surveys were electronically submitted for a response rate of 19%. Respondents placed significant value on Lourdes University's positive influence on the community. Responses also revealed that there is a lack of awareness in regards to campus events and giving societies. The researcher suggested that Lourdes capitalize on the University's involvement and influence on the community when cultivating new donors. Recommendations also included increasing donor scope through engagement of community members rather than focusing solely on alumni.

For my family, who constantly encourages me to reach for the stars. May they always know my profound love and sincere appreciation for their unending support.

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Chapter One

Overview of the Study

The aim of this study was two fold: (1) to add to the body of knowledge pertaining to mid-range donors and (2) to understand mid-range donor perceptions at Lourdes University. This research examined mid-range donors at Lourdes University, located in Sylvania, Ohio, and their perceptions on donor cultivation and stewardship. Mid-range donors, as defined by Lourdes University, is anyone who has given between \$250 and \$2,000, or anyone with a history of five or more years of giving to the University. Donor perceptions on cultivation and stewardship are crucial to improving the practices of Lourdes University's Office of Institutional Advancement. The development and retention of donors is vital to continuing fiscal success and growth.

A background of the challenges colleges and universities are faced with in regards to donor retention and increasing gifts is presented. The background is followed by a statement of the problem, which initiated this research, and the research questions, which guided this study. The significance of the research, delimitation, limitations, and assumptions is also outlined in this chapter.

Background of the Problem

For centuries, colleges and universities have relied heavily on private donations for prospering. Philanthropy in higher education has existed from the very beginning when institutions received monetary donations through their church affiliations (Thelin, 2011). While higher education institutions may be the recipients of federal funding, private institutions are not afforded state financial resources in the same capacity as public institutions.

Between the years 1997 and 2005, 27 small institutions had to close as a result of “decreased endowments, shrinking applicant pools, and facilities and technology in need of expensive renovations” (Gross, 2005). Since the economic recession of 2008, small institutions have continued to struggle with sustainability. The most recent closing of a small institution, Sweet Briar College, can be attributed to a depleting endowment. The single-sex, liberal arts institution will close its doors after a 114-year history. Over the past five years, Sweet Briar enrollment dropped, while applications increased (Jaschik, 2015). Public and private as well as large and small institutions alike experienced a range of fiscal issues following the 2008-2009 recession (Barr & McClellan, 2011).

Following the recession, philanthropic efforts became increasingly important to the financial success of higher education institutions. Mastering effective stewardship practices is critical to run successful fundraising offices. Stewardship, according to the Association of Fundraising Professionals, is defined as the process in which an institution seeks financial support, honors the donor’s intent, and acknowledges the gift through written or oral communication or a donor recognition program (Association of Fundraising Professionals, 2003).

While donations to institutions of higher learning have increased to rates higher than before the recession, during the recession, there was a significant decline in donations made to educational institutions. Since 2010, there has been a sizable increase in “educated-related philanthropy” (Tyson, 2014). The Giving USA Foundation conducted a survey to find that Americans gave a record 52 billion dollars to education in the year 2013. These donations accounted for approximately 16% of all donations to charitable causes throughout the year 2013. While financial gifts to the arts,

environmental organizations, and health organizations have increased throughout the post-recession period, educational institutions were the second most supported category, the first being religious organizations (The Giving USA Foundation, 2014).

While trends have been monitored by various organizations, few research studies in recent history have examined philanthropy in higher education. Since the year 2000, only four research studies were conducted on philanthropy in higher education. The studies were conducted at large, public, research universities. The first study examined stewardship as an organizational response (Barrett, 2004); the second study looked at motivations of major donors to music programs (Barascout, 2012); the third study investigated giving patterns of young alumni from 28 institutions (Monks, 2002); the fourth study focused on higher education institutions and how internal resources for community engagement are allocated, as well as the effect it has on their institutional advancement offices (Weerts & Hudson, 2009). A further discussion of this research will be addressed in the second chapter of this study.

While these studies aid in the understanding of philanthropy in higher education in general, they do not address several important aspects of philanthropy. With increased competition for donations, colleges and universities must have an adequate understanding of what motivates their donors as well as how effectively their development office is communicating with constituents. One group of donors in particular that tends to be understudied is mid-range donors. After exploring prior research, there were no published studies in the past 20 years that examined mid-range donors in higher education. Mid-level donors tend to be overlooked because they often “look like low-level donors” (Smercina, 2011, p. 3). However, mid-range donors are the future of major gifts

(Smercina, 2011). Nurturing mid-level donor relationships to yield major gifts in the future requires care and consideration. It is important to note that these constituents may have great giving potential, and with an informed approach, can deliver large gifts in the future. As mentioned previously, appropriate mid-range donors must be flagged for attention and watched cautiously. Just as institutions work to engage low-level donors in order to take them to the mid-range level, adequate attention must be given to mid-level donors as well.

As with any donor, appropriate and effective communication is required for successful results. However, donor communication should differ at each level of the giving pyramid. Tony Smercina, Vice President of Pursuant Fundraising, suggests that mid-range donors typically respond well to personalization (Smercina, 2011). Face-to-face solicitation will show the donor that they are of true value to an institution (Smercina, 2011). With appropriate attention and adequate engagement, mid-range donors become tomorrow's high-level donors. Thus, it is important to understand this population of donors and their giving habits.

Problem Statement

The body of literature pertaining to philanthropy at higher education institutions focuses very little on mid-range donors, an important population of constituents. As noted previously, research conducted in the past 15 years reveals that only four studies were conducted on donors and stewardship practices. None of the four studies conducted in recent history discussed mid-range donors specifically. Moreover, another examination of the research determined that no studies specific to mid-range donors were conducted in the past twenty years. Because there is little known about cultivation and stewardship

practices at small, private institutions, this study will contribute to the body of research surrounding philanthropy in higher education, specifically in relation to mid-range donors. The closing of Sweet Briar College, a small private institution, highlights the severity of an institution's need to attract and retain donors. Donors are vital to the growth and sustainability of higher education institutions. Without major gifts to the institution and its endowment, colleges and universities may be faced with significant financial challenges. With mid-range donors being the prospect for major gifts, it is critical that institutions have an adequate understanding of this population and their perceptions on cultivation and stewardship.

Research Questions

This research focused on mid-range donors at Lourdes University. For the purposes of this research, a mid-range donor is constituted by giving between \$250 and \$2,000, or anyone with a history of five or more years of giving to the University. The purpose of this study was to contribute to the body of literature pertaining to philanthropy in higher education and discover Lourdes University donors' perceptions on cultivation and stewardship as well as understand their motivations. This research was authorized by the Lourdes University Office of Institutional Advancement. Three questions guided this study:

1. What are Lourdes University mid-range donors' experiences of cultivation and stewardship as it relates to charitable giving at Lourdes University?
2. What do demographics explain about Lourdes University mid-range donors?
3. What do Lourdes University mid-range donors perceive as influences on their giving habits as it relates to giving at Lourdes University?

Significance of Research

Mid-range donors are a commonly over-looked population of donors at institutions of varying sizes. Stewardship and cultivation are both significant to institutions that rely heavily on philanthropic support for financial stability. By understanding what their constituents look like, and how to effectively steward them, institutions have a greater chance of receiving gift renewals and retaining their donors (Lagasse, 2014). This research is intended to aid in the understanding of mid-range donors' perceptions on cultivation and motivation. This study will also contribute to the understanding of donor perspectives on stewardship strategies and how to most effectively communicate with constituents.

Delimitation

This research focused on one institution, Lourdes University, in hopes of gaining a better understanding of mid-range donor perceptions on cultivation and stewardship at a small, private institution. Given the general lack of research surrounding mid-range donors at small, private institutions, this study will contribute to the body of literature by concentrating on one liberal arts university.

Limitation

This research was designed to support the Office of Institutional Advancement at Lourdes University in evaluating their donor cultivation and stewardship as it relates to mid-range donors. Other academic institutions of similar composition may benefit from the information presented. However, the findings presented in this research are not generalizable.

Assumptions

Two assumptions were made when conducting this research. The first assumption was that donors completing the survey would answer the questionnaire with honesty. The second assumption was that professionals outside of Lourdes University who are actively involved with academic fundraising, specifically at small, private institutions, would be able to obtain useful information from these findings to enhance and enrich their respective institutions and the philanthropic efforts at said institutions.

The researcher, a fundraising professional in higher education, put aside preconceived notions and perceptions on mid-range donors at private higher education institutions when reporting the findings. The analysis of research is reported without bias. This will be discussed further in Chapter three.

General Terms

Advisory Board

An advisory board is a group of influential individuals who offer counsel to the organization in which they are selected to advise. Advisory boards often do not have fiscal responsibility associated with them (Association of Fundraising Professionals, 2003).

Annual Gifts

Gifts donors make in response to yearly requests to support the institution's current operating needs. Annual gifts are usually solicited through an organized program involving direct mail, organized telephone campaigns, and personal solicitation (Worth, 1993).

Ask

The “ask” is the point during a solicitation in which the donor is approached for a specific request (Worth, 1993).

Bequest

A bequest is a gift granted upon death of a donor through their will (Worth, 1993).

Capital Campaign

A capital campaign is an “intensive fundraising effort to meet a specific financial goal within a specified period of time for one or more major projects that are out of the ordinary, such as the construction of a facility, the purchase of equipment, or the acquisition of endowment” (Association of Fundraising Professionals, 2003).

Charitable-Gift Annuity

Charitable-gift annuity is a sum of money paid in installments by a charity to a beneficiary in exchange for the donor’s gift of property or cash (Association of Fundraising Professionals, 2003).

Cultivate

To create or maintain interest of a prospective or current donor, alum, or volunteer, through the engagement of an organization’s mission, planning, or programs. (Association of Fundraising Professionals, 2003).

Deferred Gift

A deferred gift is one made by bequest, insurance, life income arrangement or trust, with the institution’s access to the principal being “deferred” until the death of the donor or another beneficiary (Worth, 1993, p. 415).

Endowment

Funds invested for the long term, with principal remaining intact and only income being available for expenditure. Income from endowment funds may be earmarked for specific programs or activities or may support general institutional needs (Worth, 1993).

Major Gift

A gift larger than an annual gift often paid in installments over a period of years and usually designated for a capital purpose. The dollar level at which a gift is considered “major” depends upon the needs and fund-raising history of the institution (Worth, 1993, p. 417).

Mission Statement

A mission statement is an organization’s purpose or plan for improving a societal need or value (Association of Fundraising Professionals, 2003).

Planned Gift

A planned gift is one that is made in the context of the donor’s complete financial and estate planning. Worth says, “Planned gifts often involve a bequest, trust, or annuity arrangement and usually provide tax benefits or other financial advantages to the donor as well as benefiting the institution” (Worth, 1993, p. 418).

Stewardship

Stewardship is the process in which an institution seeks financial support, honors the donor’s intent, and acknowledges the gift through written or oral communication or a donor recognition program (Association of Fundraising Professionals, 2003).

Summary

Many higher education institutions rely heavily on donor support for sustainability. Within the past 15 years only four studies pertaining to philanthropy in higher education were conducted. None of the four studies on higher education fundraising focused on mid-range donors. Thus, this research will add to the body of literature surrounding mid-range donors in higher education through a survey designed to understand donor motivations and perceptions on stewardship practices.

Higher education institutions should have an adequate understanding of their donors' motivations and what will inspire donors to reach the next level of giving. Colleges and universities need to improve on their practices to ensure donor satisfaction, as well as hold themselves accountable for results pertaining to their efforts. Effective donor communication and cultivation is essential to successful stewardship. To assist in the understanding of donor perceptions on cultivation and stewardship at Lourdes University, the researcher designed a survey to examine mid-range donors. The primary goal of this research was to contribute to the body of research surrounding donor cultivation and stewardship at small, private institutions.

Chapter two outlines the existing literature and research pertaining to cultivation and stewardship in higher education. Chapter three describes the research methods and procedures, provides information on the population studied, biases, and the process of analysis. Chapter four summarizes the findings from this research, and chapter five provides a discussion of the findings presented in chapter four.

Chapter Two

Review of the Literature

Chapter two examines literature pertaining to fundraising within higher education institutions. After a careful review of the research literature on mid-range donors, it was determined that there are no published works pertaining to mid-range donors at small, private institutions. However, it should be noted that institutions might survey their constituents without publishing the findings. In the past 15 years, four studies regarding philanthropy in higher education were conducted. The literature referenced in this study will help the reader understand the history of stewardship in higher education, the significance of donor cultivation, effective stewardship strategies, recent research and trends, as well as the significance of development in higher education institutions.

History of Stewardship in Higher Education

The earliest colleges in America were originally sponsored by churches and therefore had religious affiliations (Thelin, 2011). Later, the fundamental American value of separation between church and state kept higher education institutions independent from the government, and consequently free from government interference (Worth, 2002). As a result, higher education institutions were responsible for their own fundraising (Worth, 2002). American culture also emphasized individual initiative and vested interest in the public good. The aforementioned societal values combined with the American tradition of philanthropy made it possible for colleges and universities to be sustained through private stewardship (Worth, 1993). The earliest recorded fundraiser for higher education institutions was George Whitfield, who raised money for Harvard

University, Dartmouth College, Princeton University, and the University of Pennsylvania through his religious preaching tours early in the Eighteenth century (Worth, 2002).

Effective Stewardship Strategies

Though fundamental tactics have not altered greatly, donor programs and stewardship strategies have grown and matured since the beginning of higher education fundraising. Selling the college is vital to securing funds, according to J. Scott Buchanan, as cited in *Advancing the Small College* (Buchanan, 1981). Selling the college involves four elements: institutional mission, goals and plans, clientele, and a constituency program (Willmer, 1981).

The institutional mission should be used to capitalize on the uniqueness of the college or university. Institutional goals and plans should be communicated to the donor or prospective donor as a planning guide for development. The clientele that the office of institutional advancement should be focused on includes, but is not limited to, the following groups: institutional alumni, community members, parents of current students and alumni, and those with a similar religious affiliation. Finally, the constituency program should be the strategy by which the institution plans to communicate with its clientele (Buchanan, 1981).

The previously stated elements of selling the college should be utilized in the following four stages: resourcing, cultivation, solicitation, and gift renewal. The first stage, resourcing, is the process by which the institution discovers prospective donors through a system involving research, rating, and matching (Buchanan, 1981). Joshua Birkholz (2008), author of *Fundraising Analytics: Using Data to Guide Strategy* proposes that institutions prospect individuals by looking at current donor activity in

programs such as annual giving. Birkholz (2008) says the following regarding this form of gift-based prospecting:

This approach is based on an assumption that donors follow a cycle that mirrors our development process. This giving cycle says that donors give gifts to the base, they become loyal through consistent giving, this giving increases, they transition to major gift levels, and as they approach the ends of their lives, they give planned gifts (p. 32).

Gift-based prospecting requires a development office to look at individuals who are already invested in the institution, perhaps at the mid-range level. Once donors reach a specified point of giving, they are to be “flagged for individual attention,” and the development professionals can begin cultivating the donor for a more sizable gift (Birkholz, 2008, p. 31).

Cultivation is the second stage in selling the college, which necessitates the institution to adequately prepare a prospect to “respond favorably to a specific request” (Buchanan, 1981, p. 55). There are many theories on how to successfully cultivate major donors, but Russ Alan Prince and Karen Maru File (1994), authors of *The Seven Faces of Philanthropy*, suggest that identifying the donor’s personality is a crucial component of cultivation. The seven faces they refer to are ‘the communitarian, one who gives because it makes sense; the devout, an individual who gives because it is God’s will; the investor, one who believes doing good is good business; the socialite, an individual who thinks that doing good is fun; the altruist, one who believes that doing good feels right; the repayer, who does good in return; and the dynast, who does good because it is a family tradition’ (Prince & File, 1994).

Regardless of which category the prospective donor falls under, the attraction of an individual to an organization or institution is also going to rely heavily on the mutual

connections of the organization and the prospective donor. Prince and File state, “by understanding what the potential connections are and by understanding how this process operates, fund-raising executives create effective and lasting relationships with affluent prospects” (Prince & File, 1994, p. 111).

Some may argue that the most important stage of selling the college is the second, cultivation. Buchanan states the importance of cultivation programs for probing the interests of prospective donors and catering their interests to the plans and needs of the institution (Buchanan, 1981). However, it is important to note that cultivation must go further than surface level communication. To be most effective, donor cultivation requires institutional advancement professionals to include prospective donors in institutional planning in a genuine, meaningful way. Not only will this enhance the donor relationship, but also solidify the institution’s commitment to their goals (Worth, 1993).

The third stage, solicitation, is the official asking for a gift (Buchanan, 1981). Judith M. Gooch reiterates, “People give to people” (Gooch, 1995, p. 87). The point at which a development officer is expected to ask for a specific donation raises additional ethical concerns. This is, as Gooch points out, because many successful solicitors are the peers of prospective donors; she explains:

If the development officer tries to act as a peer in articulating the argument for the prospect’s support, he or she can be readily perceived as deceptive. It is not that friends cannot solicit friends: they can and do. But the basis of the relationship between the development officer and the prospect is not friendship; nor do they share a perspective of concern. This weakens the force of any appeal from the development officer (Gooch, 1995, p. 94).

Professionals in institutional advancement must remember the importance of ethical behavior, that is, to always act in the best interest of the institution in which they serve (Gooch, 1995).

Finally, gift renewal is when a donor repeats their gift, most likely because they are keen on the way an institution responded after each of their previous gifts (Buchanan, 1981). Judith M. Gooch says the following in regards to gift renewal:

Development officers come and go, as do presidents and volunteers. A donor who feels a sense of connection with what the institution is all about - the faculty and the students - is likely to continue to support it, and to make gifts to meet real needs (Gooch, 1995, p. 100).

Significance of Development in Higher Education Institutions

Whether the donor is a lifetime friend of the institution or a young alumnus, the level of care and attention given to their friendship should be the same. However, the cultivation process will likely be different with each donor. It is believed that donors of a younger age make their decisions regarding stewardship faster than their older counterparts and often without an extended relationship with an institution. This also makes younger donors more prone to respond to ideas faster than older donors. That being said, it should be noted that younger donors are also more disposed to stop giving to an institution and may have less loyalty (Willmer, 1993). It is also important to note that millennials, those born between the years 1982 and 2001, are known for their volunteering (Drezner, 2011). Much like the gift-based prospecting, volunteers are likely to be motivated to give due to their commitment of service. Professionals in institutional advancement should continue to nurture the institution's relationship with young donors, since they are the prospective planned giving donors, as well as potential major gift donors (Willmer, 1993).

Many younger donors begin giving under the category of unrestricted funds and eventually fall under the major gift category when their relationship is appropriately fostered. There are three general methods for giving at higher education institutions; they

are: unrestricted, capital, and endowment. Unrestricted funds are raised through mail, telephone, or personal visits. Often solicited through personal contact, capital gifts are donations used to fund buildings and equipment. Finally, endowment funds are typically used to provide scholarships, programs, academic chairs, and unrestricted funds. Unrestricted funds, also known as annual funds, comprise the “money to live by” for many small, independent higher education institutions (Willmer, 1993, page 41).

Regardless of which method of giving is pursued, preparation and planning is required of the fundraiser. In his book *Winning Strategies in Challenging Times for Advancing Small Colleges*, Wesley K. Willmer (1993) explains the significance of preparation and planning. Willmer states, “while planning is vitally important to a successful fund-raising operation, it must be based on information gained through a market analysis and a study of who gives to the institution and why” (Willmer, 1993, page 34). Fundraising plans should be centered on the institutional mission and objectives (Willmer, 1993). Institutional advancement goals, which often include cultivating donors for gift renewal, are most successful when institutional friendships offer support and understanding. This can be achieved through either oral or written communication with a college or university’s donor population (Willmer, 1981). It is expected that the college or university president is the main solicitor, particularly of major gifts, through their communication plan with his or her constituents (Ryans & Shanklin, 1986).

Ralph L. Lowenstein (1997) explains in *Pragmatic Fund-Raising for College Administrators and Development Officers*, that communication is not only vital in regards to prospective donors and securing donations but also in remembering those who gave in the past. The focus for offices of institutional advancement frequently seems to be on the

next potential donor; when in actuality, it is imperative to maintain communication with previous donors. Lowenstein suggests the following tools for successful stewardship: phone calls, birthday greetings, and visits. Each of these tools allows for continued communication without asking for a donation with each conversation (Lowenstein, 1997). A reaction from a donor's response to a proposal was recounted in *Strategic Planning, Marketing & Public Relations, and Fund-raising in Higher Education*, "This is wonderful and I promise you that we will consider it -- as soon as you thank us for the last gift that we gave to your institution" (Ryans & Shanklin, 1986, p.181). Expressing gratitude for gifts is not only courteous, but also necessary to maintain a healthy relationship with current and prospective donors.

While expressing gratitude for gifts is critical, expressing appreciation for volunteers is also vital. It is no secret that small private liberal arts institutions could not function without volunteers. Volunteers of all ages may serve in many different areas, be it as a member of the Board of Trustees, serving on an advisory or alumni board, or a community member volunteering at an annual fundraiser. However, offices of institutional advancement must remember that volunteers often make the best salesperson for the college for they have already been persuaded by the college and are committed to the institution in one way or another. It must be noted that while volunteers may play a key role in major gifts, a third party may inhibit a donor from speaking freely, such as with deferred gifts (Rhodes, 1997). Rhodes (1997) states, "in soliciting a deferred gift, one tries to establish a client-professional relationship in which the donor or client gains enough confidence in the professional or solicitor to reveal what assets and needs he or

she has” (p. 68). Revealing such personal needs may make the donor uncomfortable if a third party becomes involved (Rhodes, 1997, p. 69).

Recent Research Pertaining to Philanthropy in Higher Education

Within the past 15 years, only four studies pertaining to philanthropy in higher education were conducted. The first study, *Gifts on a High Note* (Barascout, 2012), is a case study of major donors to music programs; the second study by T. Gregory Barrett (2004); aimed at understanding the interaction of organizational contexts and institution and task environments as it relates to fundraising within several schools at the University of Michigan. The third study, by James Monks (2002), investigated giving patterns of young alumni from 28 institutions. Finally, the fourth study, by Weerts & Hudson (2009), focused on higher education institutions and how internal resources for community engagement are allocated, as well as the effect it has on their institutional advancement offices.

Barascout (2012) conducted his qualitative study by investigating motivations of donors who gave to music programs at large, public, research universities. Two institutions were examined in this study, referred to as Millichap University and Moss University. Barascout interviewed donors on their motivation and giving patterns to obtain information for this research. Barascout found that the two largest influences on individuals giving to music programs were “affinity for music and arts” and the other was what he considered to be “global motives” (Barascout, 2012, p. 86). The term “global motives” was used to describe donors who view music as an important and positive influence on the community and improving civilization. It was also noted that the global

motives were “closely related to the donors’ view on the importance of higher education” (Barascout, 2012, p. 86).

Barrett (2004) explored stewardship at the University of Michigan by collecting documents, archived records, and interviews at five schools at the University. Barrett determined that there were common understandings and beliefs on stewardship among the five schools studied. The data showed that “influence on stewardship included institutional environment” as well as the University’s commitment to raise money through the organizational context. The organizational context referenced in this study includes centralization, reputation, interactions, politics, and competition. The author found that resource dependence and the uncertainty of “donor behavior” were significant factors in stewardship practices from the professional schools and colleges considered at the University of Michigan (Barrett, 2004).

A third study, investigated giving patterns among young alumni from 28 institutions (Monks, 2002). Monks used a survey to better understand the participants’ undergraduate experience, current activities, satisfaction with their alma mater, and demographics. This research found that graduates with a Master’s of Business Administration or law degrees averaged higher donations, while graduates with Doctor of Philosophy degrees did not give significantly more than others. Similarly, alumni who reported involvement with on-campus activities, organizations, or faculty and staff members, had a higher average of donations to their alma mater than those who were not active participants on campus throughout their undergraduate degree. According to the survey, conducted in 2000, black, Hispanic, and individuals from multi-racial or multi-ethnic groups give 39, 23, and 27 percent less than their white counterparts, respectively.

Monks also found that married individuals give, on average, 18% more to their alma mater than single people. Finally, Monks stated: “The single biggest determinant of the generosity of alumni donations is satisfaction with one’s undergraduate experience” (Monks, 2002, p. 129).

A 2009 study was conducted to examine how higher education institutions “allocate internal resources to support engagement and how these campuses have reshaped their institutional advancement programs” (Weerts & Hudson, 2009, p. 65). Many institutions have worked to increase community engagement through partnerships and branding. This study focused on 15 institutions: three land-grant universities, three private research universities, three comprehensive universities, three private liberal arts colleges, and three associate colleges. A thematic analysis of institutional responses to four questions was conducted to determine findings. The results showed that generally, private liberal arts colleges and community colleges had engagement programs already “deeply embedded within the core teaching and learning philosophies”. Such was not the case with the large, research institutions. The budgets and internal support of engagement was “more complex” (Weerts & Hudson, 2009, p. 69). Finally, in regards to fundraising, it was found that increasing community engagement has shown to increase public support for higher education institutions (Weerts & Hudson, 2009). Given the gap in current research pertaining to fundraising in higher education, it is important to consider recent trends in the area of philanthropy in order to understand what is happening in this field.

Recent Trends in Higher Education Philanthropy

Effective communication is crucial to a successful Office of Institutional Advancement. Social media and online communication has made it easier for institutions

of higher learning to contact and stay connected with alumni, especially younger alumni. Furthermore, with so many colleges being present on various forms of social media, institutions are able to connect with current students and young alumni to increase their records of potential donors and keep up-to-date contact information. However, the statistics, which prove that alumni donations are down but donor support has increased, supports the notion of the large income gap among socioeconomic statuses. According to Marts and Lundy, a philanthropic consulting firm, 2013 marked the “return of major gift contributions to academia” (Marts and Lundy as cited in Troop, 2014).

Lippincott notes the significant student debt problem in America as a large contributing factor to the decrease in alumni giving (Lippincott as cited in Tyson, 2014). Don Troop, author of *Gifts to Colleges Hit \$33.8 Billion*, an article from the *Chronicle of Higher Education*, reports that alumni support has been on a constant decline for over 25 years. However, while alumni support has decreased steadily, alums also make up the largest group of contributing donors to individual institutions. This again supports the facts that while overall constituent numbers are down, sizable gifts are up (Troop, 2014).

Many donors recognize that colleges and universities are one of the most sensible places to invest their money. Not only are colleges and universities well worth the investment for their educational benefits, but donors also recognize that higher education institutions contribute greatly to society. Donors also have the opportunity to invest in colleges and universities through various facets, including, but not limited to, athletics, fine arts, social causes, economic development, or research (Tyson, 2014). Thus, it is crucial that institutions use their mission and development plan to motivate donors, specifically mid-range donors.

According to *Understanding Donor Motivations for Giving* (2009), donors from the Midwest/Plains region are highly motivated by community needs. In 2007, The Center on Philanthropy at Indiana University conducted the Charity Survey, which found that the number one priority for philanthropists in the Midwest/Plains region was “making the community better,” followed closely by “making the world better” (Center on Philanthropy, 2009, p. 20). Those that identified making the world a better place as their most motivational factor in charitable giving, on average, made larger gifts (Center on Philanthropy, 2009).

The 2007 Charity Survey also found that donors who make over \$100,000 consider “making the community better” the top priority when considering charitable donations. Both income groups of those making less than \$50,000 as well as those making between \$50,000 and \$100,000, recognized basic needs as the driving force behind their contributions (Center for Philanthropy, 2009, p. 27). Those who have completed an associate’s degree or higher, labeled “making the world better” their largest motivating factor of donating, while those who have achieved a high school degree or less agreed that “helping the poor” was more influential on their philanthropic decisions (Center on Philanthropy, 2009, p. 29).

Summary

This chapter presented literature pertaining to fundraising within higher education institutions. It was noted that only four studies relating to philanthropy in higher education were conducted in the past 15 years. None of those four studies focused on mid-range donors at small, private institutions. Thus, the bulk of the research is based on textbooks and recent trends in overall donations to higher education institutions.

Beginning with the history of stewardship, this chapter examined the significance of donor cultivation as well as effective stewardship strategies and the significance of development in higher education institutions.

It is crucial that fundraising professionals understand the significance of effective stewardship strategies that have proven to be successful for other institutions of higher learning. It is also vital for this study that the impact of donor cultivation be understood. By understanding donor motivations and perceptions on cultivation and stewardship, institutional advancement programs can evaluate their strategies to enhance donor relations. Finally, by understanding the perceptions on donor influences and giving habits, fundraising professionals can tailor asks to garner successful giving.

Chapter Three

Research Design and Methodology

This research was designed to investigate the perceptions on cultivation and stewardship of mid-range donors at Lourdes University. Three research questions were derived based upon gaps in the literature. Three research questions guided this investigation:

1. What are Lourdes University donors' experiences of cultivation and stewardship as it relates to charitable giving at Lourdes University?
2. What do demographics explain about Lourdes University mid-range donors?
3. What do Lourdes University mid-range donors perceive as influences on their giving habits as it relates to giving at Lourdes University?

Context of the Institution

Lourdes University in Ohio, is a prime example of an institution that relies heavily on donor support for existence. In addition, this University is particularly interested in understanding their mid-range donor constituents, because little is known in the literature about this population. Furthermore, mid-range donors are prospective major donors, which make them an important population to study.

In August 2011, Lourdes College transitioned to Lourdes University. Since then, Lourdes University has experienced a change in leadership, with three different presidents in the past four years. These changes, in conjunction with the transition to retain traditional students, make donor retention and satisfaction vital. As the administration, in union with the board, looks to the future and works to update their strategic plan, it is imperative that they take donor perceptions into account. The Lourdes

University Vice President for Institutional Advancement noted that mid-range donors make up a large portion of the institution's donor population.

In addition to renewing the University strategic plan, Lourdes is in the process of rebranding the institution and expanding amenities. Residence halls were purchased in 2011 along with property adjacent to the University. The purchased land is amidst a face-lift and currently undergoing extensive changes, including the addition of a sports complex. These physical changes, concurrent with rebranding through heightened admissions standards, means Lourdes University must take donor satisfaction very seriously. As a newly defined institution, Lourdes is in a prime position to reexamine donor practices while focusing on the improvement of existing donor relationships and taking the opportunity to capitalize on the acquisition and retention of new donors.

Description of Lourdes University

Lourdes University is a Catholic, co-educational liberal arts institution located in Sylvania, Ohio. Lourdes University began as an extension of the College of Saint Teresa, located in Winona, Minnesota in 1943. In 1958, the community of Franciscan sisters founded Lourdes Junior College, which, at the time, was strictly a school for religious women. Lourdes received accreditation from the North Central Association of Colleges and Schools in 1964, before admitting laywomen in 1969 and laymen in 1975.

For the remainder of the Twentieth century, Lourdes College was a school for non-traditional and commuter students. Although it was not a community college, the school did not offer athletic programs, housing, or traditional on-campus activities, such as Greek fraternities and sororities.

Along with a name change in 2011, Lourdes expanded their territory to now offer campus housing. In addition, Lourdes University is in the process of completing their mid-campus project, connecting the main campus, home of the academic halls, to their residence halls. The University is in the middle of a large fundraising campaign, and the Office of Institutional Advancement would like to focus on the continued improvement of relationships with existing donors while attracting and retaining new donors (Lourdes University, 2015).

Research Method and Design

The researcher used a self-designed mixed-methods approach to this study, using both quantitative and qualitative questions in the survey (Appendix B). A mixed method survey, which uses quantitative and qualitative questions, was chosen, as a quantitative survey would not have adequately captured each of the possible responses for donor perceptions on experiences with cultivation and stewardship practices. The survey was self-designed since there was not an existing research instrument that examined cultivation and stewardship. Also, a self-designed survey allowed the researcher to capture information specific to Lourdes University. Survey research, according to Anol Bhattacharjee (2012) can be used for descriptive, explanatory, or exploratory research. Due to the lack of existing research on mid-range donor perceptions of cultivation and stewardship at similarly small, religious higher education institutions undergoing extensive changes, this research is an exploratory design aimed at providing a direction for future research at analogous institutions (USC Libraries, 2015). Similarly, given the lack of an existing instrument used to measure donor perceptions at small institutions, the questionnaire was self-designed by the researcher.

Survey research was the chosen tool given the ability to measure unobservable data, such as people's giving preferences, beliefs, and behaviors. Given the cost of a paper survey, and the anonymity of an individualized survey link, an electronic survey was believed to be the best choice. Additionally, survey research is unobtrusive and allows for confidentiality of constituents (Bhattacharjee, 2012). The researcher did not obtain personal or contact information in order to conduct this study. Lourdes University was responsible for sending out the live survey link via electronic mail to those who classified as mid-range donors. Cost and time were also taken into consideration when weighing possible research instruments.

Sample and participants. The sample of donors selected for this study was comprised of those who had a giving history of five or more years or whose individual contributions ranged between \$250 and \$2,000. Based upon Lourdes University's statistics, mid-range donors were defined by the aforementioned parameters. Because this sample is defined by these parameters, it is considered a criterion sample. Criterion sampling is used for cases in which the researcher is looking to research a population of individuals that meet pre-determined criteria (Robert Wood Johnson Foundation, 2008). To reduce errors, the entire mid-range donor population, consisting of 275 donors, received the electronic survey from Lourdes University. The Office of Institutional Advancement retrieved emails by querying their electronic donor database.

Instrumentation. The research instrument, an electronic survey created on the website Qualtrics, contained 32 questions. The 32 included 11 demographic questions, 9 open-ended questions, 5 close-ended questions, and 7 Likert-scale questions. The demographics questions were chosen to better understand the survey participants. The

close-ended questions were used for questions regarding attendance and participation in events and awareness of stewardship initiatives at Lourdes University. Finally, the Likert-scale questions and open-ended questions were used to obtain knowledge of donor perceptions on communication, events, and additional demographic information (e.g. career).

Field procedures. Lourdes University sent the live survey link through their electronic mail system to 275 donors who fell within the parameters created by the Lourdes University Office of Institutional Advancement. The Lourdes University Office of Institutional Advancement created the criteria used for defining mid-range donors and ran a report to determine the constituents that fell within those parameters. Upon completion of data retrieval for mid-range constituents, Vice President of Institutional Advancement, Mary Arquette, sent a recruitment letter to qualified constituents on June 5, 2014. The recruitment letter was sent through Lourdes University's electronic mail system (Appendix A). The letter outlined and endorsed the research and requested participation by completing the electronic survey. One week after the recruitment email was sent, the survey was distributed to the population of donors designated by Lourdes University's Office of Institutional Advancement. An email containing the cover letter and live survey link was sent to mid-range donors on June 12, 2014 requesting participation in the survey at their earliest convenience. A reminder email along with the live survey link was sent out June 30, 2014 and again on July 30, 2014, each time from the Lourdes University Office of Institutional Advancement.

Donors were asked to use the link provided in the email to complete the ten-minute questionnaire. They were informed that the survey would be contributing to a

research project for a graduate student at the University of Toledo being supported by the Lourdes University Office of Institutional Advancement. Additionally, the cover letter expounded the significance of the survey and its impact on the continued improvement of cultivation and stewardship practices at Lourdes University.

Those participating in the survey were sent an email containing the informed consent along with the cover letter, as well as a notification upon entering the survey. Prior to entering the first question of the survey, donors received the following message:

By completing this survey, you are indicating your consent to participate in this study. Declining to participate will have no adverse affect on your relationship with Lourdes University. All submissions are confidential and data will be destroyed upon completion of analysis.

Confidentiality of participants was assured in two ways. First, the email containing the cover letter, informed consent, and survey link were sent out by Lourdes University, rather than the researcher. With Lourdes University sending the email, it was clear that the researcher did not obtain any personal or contact information to complete the study. In addition, each participant was made aware at the beginning of the survey that they received an anonymous survey link, which would protect their identification. After three emails from Lourdes University requesting participation in the online donor survey, 53 surveys were submitted electronically through Qualtrics, an online survey system designed for academic and market research (Qualtrics, 2014).

Processing and analysis. Of the 275 donors to receive an email containing the request for participation of the survey instrument measuring donor perceptions of cultivation and stewardship, 53 were open links for a response rate of 19.3%. The percentage of responses falls within average of survey response rates, typically between 15-20% (Bhattacharjee, 2012). Not every respondent finished the survey in its entirety;

therefore, the aforementioned surveys were only used in the analysis of questions that were completed.

In order to complete data processing, the researcher used the International Business Machine (IBM) software system Statistical Package for the Social Sciences (SPSS). Frequencies for quantitative questions were tabulated, which allowed the researcher to determine the amount of responses for each question as well as the percentage of participants who answered based on any of the provided responses. Said frequencies also allowed the researcher to gain information on the amount of participants who opted out of answering each question. However, since the survey conducted was a mixed-methods approach, the researcher also used themes to draw conclusions from the qualitative questions presented throughout the instrument.

Statistical analyses were conducted for the quantitative questions using SPSS. Deductive reasoning was used when examining the qualitative questions. The research questions that guided this analysis were:

1. What are Lourdes University donors' experiences of cultivation and stewardship as it relates to charitable giving at Lourdes University?
2. What do demographics explain about Lourdes University mid-range donors?
3. What do Lourdes University mid-range donors perceive as influences on their giving habits as it relates to giving at Lourdes University?

Statistical analyses were used to determine correlations between donor demographics and donor perceptions of influences on their giving. Donors' perceptions on variables of influence were examined through frequencies (question one), as were their satisfaction with Lourdes University fundraising (question four) and campus

(question five) events. Frequencies were also used to understand donors' awareness (question two) and interest in donor benefits and recognition societies (question three). Finally, frequencies were run to determine the level of connection donors felt to the Lourdes University community (question sixteen) as well as their affiliation to the University (question seventeen). In addition to running frequencies, the researcher drew conclusions based on themes that were present among the qualitative questions (questions six, seven, eight, nine, eleven, nineteen, and twenty). Reading each of the responses to the qualitative questions and compiling common responses determined themes present within the research.

Findings from these analyses are described in the Results chapter of this study. Statistical analyses and the examination of themes allowed the researcher to evaluate the value of the instrument and gain an understanding of mid-range donors' self-reported perceptions on cultivation and stewardship at Lourdes University. Fifteen surveys were only partially completed. As a result, unanswered questions are not considered in the percentages presented. A discussion pertaining to these findings is included in the final chapter of this research.

Summary

This chapter addresses the context and description of Lourdes University, a private liberal arts institution located in Ohio. Lourdes University relies heavily on donor support for sustainability. Since mid-range donors make up a large portion of their constituency, it is crucial that Lourdes University understand the demographics and giving habits of their donors. A mixed-methods survey, containing quantitative and qualitative questions, was used to obtain donor perceptions on their philanthropic

experiences at Lourdes University. Donors who have given between \$250 and \$2,000, or have a giving history of at least five years, were asked to participate in this study. A criterion sample was chosen, given the desire to study donors within the parameters designated by the University.

The instrument, containing 32 questions, was an online survey link sent via electronic mail from the Lourdes University Office of Institutional Advancement. Fifty-three surveys were completed, for a 19.3% response rate. The researcher did not obtain personal information of constituents for the completion of this study. The confidentiality of participants was ensured by the anonymous survey link used to distribute the survey. The researcher conducted frequencies of quantitative questions and drew themes from each qualitative response to analyze the results. Findings from the research are presented in the following chapter, titled Results.

Chapter Four

Results

This research focused on donor relations at Lourdes University located in Sylvania, Ohio. In 2011, Lourdes transitioned from Lourdes College to Lourdes University (Lourdes University, 2014). One year later, Lourdes University purchased apartment buildings at the intersection of Brint and McCord roads in Sylvania. As a result, the institution began their Mid-Campus Project in 2013 to connect the main campus with the newly purchased residence halls. With changes abounding at Lourdes University, the Office of Institutional Advancement felt it necessary to obtain information regarding their donors' perceptions on cultivation and stewardship in order to maximize efficacy and to prevent donor fatigue.

This research was intended to contribute to the body of literature surrounding donor relations at small, liberal arts higher education institutions. This study is also intended to provide pertinent information to the Lourdes University Office of Institutional Advancement in order to assess their cultivation and stewardship practices. Three questions guided this study:

1. What are Lourdes University donors' experiences of cultivation and stewardship at Lourdes University?
2. What do demographics explain about Lourdes University mid-range donors?
3. What do Lourdes University mid-range donors perceive as influences on their giving habits?

In this chapter, donor demographics from this respondent sample and responses to individual survey questions are reported. Due to the nature of this survey, as a mixed-

methods approach, statistical analyses were used to obtain information on Likert-scale questions and demographics. For open-ended questions, the researcher went through the responses individually and summaries of these responses and their prominent themes are presented. Unanswered questions by any given respondent were not included in the analysis; therefore, some questions have fewer responses (e.g., total household income) and are not reflected in the percentage stated.

Population of Mid-Range Donors

At the time this survey was distributed, Lourdes University had 275 mid-range donors. According to the Lourdes University Office of Institutional Advancement, a mid-range donor is one who has given between \$250 and \$2,000 or has a giving history of five or more years at Lourdes University. Since its inception in 1958, Lourdes University, originally Lourdes Junior College, has continued to grow and develop. Originally a school for religious women of the Franciscan order of the Roman Catholic Church, Lourdes University is now providing a liberal arts education to both lay men and women. As a private institution, Lourdes University relies heavily on the sponsorship of the Sisters of St. Francis and donations from alumni, community members, and friends of the University.

A recruitment letter inviting donors to respond to the electronic survey was sent out prior to the three separate e-mails requesting their participation in the months of June and July in the year 2014. Of the 275 mid-range donors to receive the electronic questionnaire regarding their cultivation and stewardship experiences at Lourdes University, 53 electronic surveys were submitted, for a 19.3% response rate.

Respondent Demographics

Nearly two-thirds of the respondents identified as female (61.5%), and over one-third identified as male (38.5%). Fifteen respondents chose not to identify themselves as either male or female. Half of the survey respondents placed themselves in the age category of “65+”. Table 1 shows the numbers and percentages for the question regarding age. The majority of respondents completed at least one post-secondary degree. Table 2 illustrates the responses to the question regarding the highest earned degree.

Table 1

Age of Respondents

Age Range	Number of Responses	Percentage of Responses
20-29	0	0%
30-39	3	7.9%
40-49	1	2.6%
50-65	15	39.5%
65+	19	50%

Question 29 on the survey was an open text box requesting the participant’s profession. This question yielded 100% participation with results ranging from diagnostic radiology to elementary school librarian, executive director of a non-profit to economic development. The most prominent field was medical, followed closely by education. These responses, related to the degree-earned frequencies, are displayed in Table 2.

Table 2

Highest Earned Degree of Respondents

Highest Earned Degree	Number of Responses	Percentage of Responses
High School or GED	0	0%
Some College	3	7.7%
Bachelor's Degree	12	30.8%
Master's Degree	16	41%
Doctorate Degree	7	17.9%
Prefer to Not Disclose	1	2.6%

Respondents were also asked to provide their total household income by selecting one of the ranges stated in the matrix on the questionnaire. The most frequent response was “prefer not to disclose”, followed by \$100,000 to \$150,000.

Table 3

Total Household Income of Respondents

Total Household Income	Number of Responses	Percentage of Responses
Less than \$30,000	1	2.6%
\$30,000-\$60,000	2	5.3%
\$61,000-\$99,000	6	15.8%
\$100,000-\$150,000	7	18.4%
\$151,000-\$250,000	2	5.3%
\$251,000+	3	7.9%
Prefer to Not Disclose	17	44.7%

Participants were asked to identify the religious denomination with which they most closely affiliate. Over 60% of the valid responses stated that the religious denomination with which they most closely affiliated with was Catholic, followed by Christianity at 26.3%. None of the respondents chose the religious denominations Muslim, Atheist, or Agnostic.

Table 4

Religious Affiliation of Respondents

Denominations	Number of Responses	Percentage of Responses
Catholic	23	60.5%
Christian	10	26.3%
Jewish	1	2.6%
No Particular Affiliation	3	7.9%
Other	1	2.6%

Nearly 90% of the respondents who answered the question requesting their religious affiliation chose either Christianity or Catholicism. Over 60% of the responses indicated Catholic. Similarly, nearly 50% of valid responses suggested that religious affiliation was a moderate to strong influence on their charitable giving to Lourdes University. Five potential influences for charitable giving were presented on a Likert scale. The frequencies for these variables can be found on Tables 5-9.

Table 5

Alumni Affiliation as Influence

Influence	Number of Responses	Percentage of Responses
No Influence	18	41.9%
Little Influence	2	4.7%
Moderate Influence	6	14%
Strong Influence	17	39.5%

Table 6

Family Obligation or Tradition as Influence

Influence	Number of Responses	Percentage of Responses
No Influence	30	71.4%
Little Influence	6	14.3%
Moderate Influence	5	11.9%
Strong Influence	1	2.4%

Table 7

Positive University Influence on the Community as Influence

Influence	Number of Responses	Percentage of Responses
No Influence	2	4.7%
Little Influence	5	11.6%
Moderate Influence	14	32.6%
Strong Influence	22	51.2%

Table 8

Alignment of Personal Values with the University Mission as Influence

Influence	Number of Responses	Percentage of Responses
No Influence	7	15.9%
Little Influence	9	20.5%
Moderate Influence	13	29.5%
Strong Influence	15	34.1%

Table 9

Religious Affiliation as Influence

Influence	Number of Responses	Percentage of Responses
No Influence	17	40.5%
Little Influence	5	11.9%
Moderate Influence	10	23.8%
Strong Influence	10	23.8%

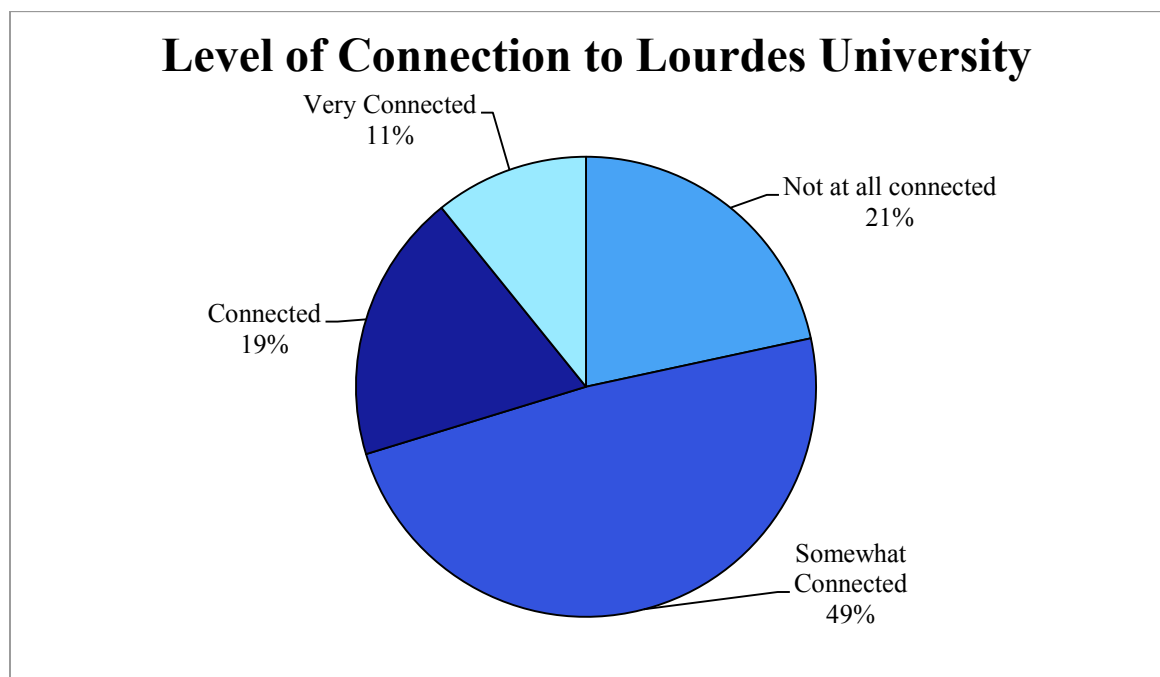
Tables 5, 6, 7, 8 and 9 above display the frequency of responses to participants' perceptions on how greatly the five provided variables (alumni, family obligation or tradition, positive university influence on the community, alignment of personal values with the university mission, and religious affiliation) have influenced their charitable giving to Lourdes University. Respondents identified most with the positive influence the university has on the community. The second most influential variable was alumni status, followed by the alignment of personal values to the University mission.

Feeling Connected to Lourdes University

According to the survey, just more than 30% of respondents felt either “connected” or “very connected” to Lourdes University. Nearly 70% of responses indicated that there were little to no feelings of connection with the University. Figure 1 shows the valid percentages of individuals’ feelings of connection to Lourdes University.

Figure 1

Level of Connection to Lourdes University



This questionnaire requested participants indicate their level of satisfaction with the following Lourdes University fundraising events: Lourdes Luminations, Hit the Links, and Celebrity Wait Night. There were overwhelming responses of “never attended” for all three events. The percentages represent the amount of valid responses that had never attended the following fundraising events: Lourdes Luminations: 61%; Hit the Links: 82.9%; Celebrity Wait Night: 70.7%. Similarly, nearly 80% of the valid

responses stated that the constituent had never been asked to volunteer at any University event.

Influences of Giving to Lourdes University

When asked about why they began giving to Lourdes University, nearly 30% of the respondents supplied an answer in the text box provided. Over half of these valid responses stated they began giving back to Lourdes University after reaching alumni status, followed by many individuals wanting to help students and the community. The positive perception of the University in the community was a common response for influencing charitable giving. One respondent stated: “I have done business with the Sisters of St. Francis and Lourdes and value their contributions to the community”; another noted “You are a great entity in this town”.

Some respondents suggested they began giving to the ongoing success of the institution because Lourdes University was their son or daughter’s alma mater. But fewer suggested that they initiated their charitable giving as a result of their religious affiliation or the sponsorship of the Franciscan sisters. One of the three respondents to identify the Franciscan Catholic affiliation as a motivating factor stated “I graduated from Providence Hospital in Sandusky with a favorable memory of the Franciscans”, another put it simply “It is Franciscan”.

The subsequent question prompted them to divulge why they continue giving to Lourdes, rather than what initially motivated them. This incited a variety of responses, many of which centered on the students and the University mission. Some of the responses, which indicated ongoing student success was a motivation to continue giving, stated:

1. “Hearing from the students and how these donations have helped them become accomplished.”
2. “It’s mission and ongoing contributions to the community.”
3. “To see that everyone gets a chance to succeed [at Lourdes University].”
4. “The ongoing progress of the University; the balance between the arts and hard sciences.”

Few responses noted motivations other than student success and community involvement. However, it should be noted that five individuals stated they are no longer giving to the University. One of those five individuals justified the absence of their donations by writing “I am no longer motivated to give to Lourdes. Despite my long association with Lourdes University, no one there seems to have the vaguest idea about who I am.”

Stewardship

Respondents were asked about their awareness of Lourdes University’s giving societies: Tau Society, Evergreen Society, Legacy Society, and Franciscan Society. Their responses are reflected in Table 10. The “percentage aware” column includes anyone who responded either “somewhat aware” or “very aware.” The “percentage unaware” column represents participants who responded either “unaware” or “very unaware.”

When asked about donor communication, nearly 92.1% of the respondents indicated they were most frequently contacted through direct mail or telephone.

However, when asked how the Office of Institutional Advancement could enhance donor communication, 78% of participants agreed that the University was doing a fine job with

donor communications. Four respondents suggested enhancing donor communication by highlighting student stories and how students have benefitted from donors' contributions.

Table 10

Giving Societies

Giving Society	Percentage Aware	Percentage Unaware
Tau Society	14%	86%
Evergreen Society	20.9%	79.1%
Legacy Society	25.6%	74.4%
Franciscan Society	25.6%	74.4%

The Community's Perception of Lourdes University

When surveyed on the community's perception of the transition from Lourdes College to Lourdes University, there was not an apparent theme. Answers ranged from "I don't believe it made a difference at all" to "I think the name change elevated the perception that Lourdes is committed to quality education" to "I don't know." While answers were split fairly evenly into three categories (yes, no, and unsure), such was not the case for the succeeding survey question. Survey question 7 asked donors to state whether or not they believe Toledo and the surrounding communities have a positive perception of Lourdes University. This question yielded several positive results, with many answering "yes." Some of the respondents who believe the surrounding communities have a positive perception of the university said:

1. "Lourdes University is a positive influence in Sylvania."
2. "Yes, but it is far too little known."

3. “Yes, I believe Lourdes has a reputation for providing a superior learning experience in a welcoming environment.”
4. “Yes, Lourdes has the reputation of providing a quality education with a focus on the total individual.”
5. “Yes. Lourdes has made significant progress in becoming more attractive to students with the addition of athletics and student housing.”

There were far fewer who suggested that Lourdes University is not seen positively in the community. One of the individuals believes there is a negative community perception of the University cited the closing of the Franciscan Academy, suggesting the school’s closing has “damaged the perception of Lourdes as a caring community.”

Summary

Both the University mission and positive influence on the community have driven donors to not only begin giving to the institution but also remain consistent givers. However, the survey results indicated that many of Lourdes University’s mid-range donors do not feel connected to the University nor have they attended any of the three annual fundraisers. Respondents were satisfied with donor communication and stewardship efforts but were not aware of the University giving societies. Chapter five discusses the findings of this research and the consequences of donor relations at Lourdes University.

Chapter Five

Discussion and Conclusion

This exploratory research examined the perceptions on cultivation and stewardship of mid-range donors at Lourdes University, located in Sylvania, Ohio. According to the Lourdes University Office of Institutional Advancement, an individual is considered a mid-range donor if they have given between \$250 and \$2,000 or have a giving history of at least five years. The exploratory, mixed-methods survey was distributed by the Lourdes University Office of Institutional Advancement through their electronic mail system in the summer of 2014. Three research questions were used to guide this study:

1. What are Lourdes University donors' experiences of cultivation and stewardship at Lourdes University?
2. What do demographics explain about Lourdes University mid-range donors?
3. What do Lourdes University mid-range donors perceive as influences on their giving habits?

A literature review was conducted to aid in the development of the survey instrument, because it was found that very little known about mid-range donors. Thus, this survey was designed to aid in the understanding of this population of constituents. The first section of the survey (questions 1-10) focused on donors' motivations and satisfaction with donor-related activities at Lourdes University. Questions 11-15 probed the donors for information regarding communication. Questions 16-20 were centered on donor connection and engagement to Lourdes University. The fourth and final section (questions 21-31) asked donors to provide demographic information. Each section

provided pertinent information that aided in the understanding of donor perceptions on cultivation and stewardship practices at Lourdes University.

This chapter includes a discussion of the findings, implications for practice, and recommendations for further research.

Summary of Findings

A summary of key findings from this study is included in this section. The most significant findings, based upon percentage of responses, are presented as they relate to the three questions that guided this research.

Research question one. The first research question asked, “What are Lourdes University donors’ experiences of cultivation and stewardship at Lourdes University?” Of the 53 participants to complete the survey, 25% or less were aware of the four giving societies Lourdes University has in place to recognize donors (Tau Society, Evergreen Society, Legacy Society, Franciscan Society). The following percentages reflect the number of respondents who indicated they had never attended the following Lourdes University fundraising events: Lourdes Luminations: 61%; Hit the Links: 82.9%; Celebrity Wait Night: 70.7%. (Question 4). Lagasse (2014) notes that gift acknowledgement is a critical step in effective stewardship practices (2014). This acknowledgement can be achieved through hosting events recognizing those in the four established giving societies.

Research question two. The second research question asked, “What do demographics explain about Lourdes University mid-range donors?” Nearly 90% of respondents were over the age of 50. Similarly, nearly 90% of the respondents identified their religious affiliation as Catholic or Christian (60% Catholic, 26.3% Christian).

Despite the high number of Catholic and Christian respondents, 52.4% suggested religion had little to no influence on their giving. Perhaps not surprisingly, the preferred method of communication for 60% of the respondents was mail or telephone. While social media is a suggested form of communication among offices of institutional advancement and their donors, it is likely that younger alumni and friends of the institution will be the main participants (Marts and Lundy as cited in Troop, 2014).

While only one respondent indicated they had been invited to take a tour of campus, many expressed interest. When asked how Lourdes University could improve their donor cultivation and communication, a campus visit was the dominant answer. Stewardship and showing appreciation for donors and volunteers can be done through a simple campus visit. This allows donors to see firsthand how their gifts are making an impact on the campus community. Stewardship is vital and is critical to gift renewal (Buchanan, 1981).

Research question three. The third research question asked, “What do Lourdes University mid-range donors perceive as influences on their giving habits?” While nearly 90% of responses indicated a Christian religion, only 50% of respondents identified religion as an influence on their charitable gifts to Lourdes University. The most common influence was the positive university influence on the community, followed by alumni status. The 2007 Charity Survey concluded that those living in the Midwest/Plains region identified “making the community better” as their largest contributing factor to charitable contributions. Similarly, Monks (2002) determined, on average, that alumni give 18% more than those who did not attend the institution. The third most popular influence was personal alignment of values to the University mission. While responses varied for

influences on giving, Willmer points out that each donor, whether they are an alum, community member, or parent, every donor requires the same care and preparation for effective cultivation and engagement (1993).

Implications for Practice

This study focused on one liberal arts institution and how its donors perceive their cultivation and stewardship experiences. The purpose of this research was two fold: (1) to add to the body of literature pertaining to mid-range donors at small, private institutions and (2) aid in the evaluation of the Lourdes University Office of Institutional Advancement's cultivation and stewardship practices at a vital time in the school's history. The results of this research cannot be generalized. However, the following suggestions may be applicable to fundraising practices at higher education institutions of similar composition. The suggestions may be particularly useful at institutions of similar size and history. The following suggestions for practice are based upon key research findings from this study.

University influence in the community. Respondents noted that the University's positive influence on the community was both an influence on their giving as well as a motivation for initiating their charitable contributions to Lourdes University. The Lourdes University Office of Institutional Advancement should capitalize on the positive impact the University has on the community when engaging and cultivating new donors. Similarly, when considering potential prospects, it is crucial to consider community members in addition to Lourdes University alumni.

As previously mentioned, The 2007 Charity Survey found that philanthropists in the Midwest region place high value on making the community a better place (Center on

Philanthropy, 2009). Likewise, Weerts & Hudson (2009) found that an institution's involvement in the community has the potential to increase public support (Weerts & Hudson, 2009). Lourdes University, through their Franciscan values of learning, reverence, and service, has been shaping the community in a positive way since their founding in 1958 and should place high value on this impact when communicating with their constituents (Lourdes University, 2015).

Respondents also indicated that the alignment of their personal values to the University's mission was a contributing factor when considering charitable gifts to Lourdes University. One important implication for this includes capitalizing on the University mission in communicating with donors. Similarly, the institution might emphasize their mission when engaging in the community to attract new or lapsed donors.

Donor connection to campus. Nearly 70% of respondents indicated that they did not feel connected to the Lourdes University campus. Judith M. Gooch argues that a donor is more likely to give when they feel connected to the institution (Gooch, 1995). James Monks (2002) also determined through research on young alumni giving, that one's undergraduate experience is a significant factor in giving habits. In addition, when posed with the question, "What do you think Lourdes University could do to engage prospective donors?" (question 20), findings indicated campus tours are important and were suggested by over 50% of the participants. Several others advised focusing on students and their stories. Still other recommendations included the following:

1. “Form committees to get ideas and volunteers to help with projects.”
2. “Provide them (donors) with a targeted ask.”
3. “Use social media.”

This connection to campus can also be enhanced through increased communication. One respondent indicated they no longer give to Lourdes University because the institution doesn’t know who they are. Ralph L. Lowenstein (1997) suggests that communication is vital in acquiring and retaining donors. Similarly, communication through gift acknowledgment will recognize donor intent and show appreciation, which Lagasse (2014) points out, is a critical step in effective stewardship practices. With appropriate stewardship policies in place to acknowledge gifts, institutions may have higher retention rates.

Engagement through events. As stated in the literature review, millennials (those born between the years 1982 and 2001) are known for their volunteering. Asking young alumni and other mid-range donors to give of their time may encourage them to also give of their treasure. By engaging them with service and continuing to foster these relationships, the Office of Institutional Advancement may see a greater motivation to give at the next level. Based on the findings, one might assume that with an increased awareness of giving societies, donors may be more aware of events and more likely to attend, especially donor recognition events and gatherings.

Recommendations for Further Research

The first survey question asked donors to identify the influence five factors had on their charitable giving to Lourdes University, providing five prompts in one block using a Likert-scale. Respondents were able to select multiple influences when answering

this question. However, this question could have been more effective by requiring respondents to choose one factor as being the most influential on their decision to provide financial contributions to Lourdes University.

Conducting a meta-analysis of research literature would allow for the synthesis of results from this survey as well as results from similar studies conducted at other liberal arts institutions. Such meta-analysis may yield additional relevant findings that could make the results generalizable. Finally, a meta-analysis would contribute to the small body of literature surrounding mid-range donors at small, private institutions.

From this research, the qualitative component was the most useful portion of the survey. The qualitative questions provided the most valuable information, due to the nature of an open-response. In the future, higher education institutions might consider forming focus groups. Focus groups foster an environment conducive to more in-depth conversation. This has the potential to allow development offices to gain more valuable information in regards to enhancing relationships with their constituents.

Summary

This chapter discussed the findings, implications for practice, and recommendations for further research based on the self-designed mixed-methods survey distributed to mid-range donors at Lourdes University. Findings from the research were presented as they related to the three research questions that guided this study. Findings were also discussed relative to what is known in the literature pertaining to mid-range donors in higher education. The results from this survey suggest that about 90% of the respondents were over the age of 50 and nearly 90% also identified as Catholic or Christian. However, only 50% of respondents considered religion to be a

motivating factor in their charitable donations. The most common influence on giving to Lourdes University was the University's positive influence on the community. Implications for practice at Lourdes University included increasing community involvement through events and campus tours, recruiting more volunteers, and providing donors with targeted asks. Finally, recommendations for further research were outlined, including the conduction of focus groups and formulating a meta-analysis of similar studies.

Conclusion

This study had a twofold purpose: (1) to add to the body of knowledge pertaining to fundraising in higher education and (2) to understand mid-range donor perceptions on cultivation and stewardship at Lourdes University. In the past 15 years, only four studies regarding philanthropy in higher education were conducted. Thus, this study will contribute to the body of literature surrounding philanthropy in higher education. While this study is not generalizable, findings may benefit institutions of similar composition. The responses to the questionnaire provided useful information for understanding donor motivations at a small, private institution.

Understanding what influences donor's charitable giving habits and whether or not they feel connected to the institution can aid in the acquisition and retention of donors. Colleges and universities of varying sizes must tailor their message to constituents in order to effectively engage their donors and maximize giving potential. Finally, by understanding what motivates their donors to give, universities like Lourdes can continue to find success in the educational market that continues to grow increasingly more competitive.

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Appendix A
Recruitment Letter



Dear Friend of Lourdes,

Within the month, you will be receiving a request to complete a survey designed to evaluate your perceptions of stewardship, as a donor of Lourdes University. The survey is contributing to a research project supported by the Office of Institutional Advancement.

Your responses will help us understand your satisfaction with your giving experiences at Lourdes University. We hope this will allow us to improve our current practices, as well as maintain our treasured relationship with all of our donors.

The Office of Institutional Advancement at Lourdes University would like to thank you in advance for your care and concern. We hope that by notifying you ahead of time, you will consider setting ten to fifteen minutes aside to help us enhance our relationship with all donors.

Sincerely,

Mary Arquette
Vice President for Institutional Advancement
Lourdes University
6832 Convent Boulevard
Sylvania, OH 43560

Appendix B

Survey



Office of Institutional Advancement
LOURDES UNIVERSITY

Thank you for agreeing to participate in the Donor Perceptions of Cultivation and Stewardship Survey, sponsored by the Lourdes University Office of Institutional Advancement. As an active donor and friend of Lourdes University, your feedback will provide us with valuable information about your reasons for contributing to the Lourdes community. Please be as descriptive and honest in your responses as possible. We appreciate your willingness to help us enhance our means of recognition, the management of gifts, and your general concerns. By completing this survey, you are indicating your consent to participate in this study. Declining to participate will have no adverse affect on your relationship with Lourdes University. All submissions are confidential and data will be destroyed upon completion of analysis.

Please indicate the amount of influence the following has on your decision to give to Lourdes University.

	No influence	Little influence	Moderate influence	Strong influence
Lourdes University alumni	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family obligation or tradition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Positive university influence on the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alignment of personal values with university mission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Religious affiliation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your awareness level of current donor benefits/recognitions.

	Not at all aware	Unaware	Somewhat aware	Very aware
Tau Society	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evergreen Society	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legacy Society	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Franciscan Society	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alumni Association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your level of interest in potential donor benefits/recognitions.

	Not at all interested	Somewhat interested	Interested	Very interested
Membership card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual tour of campus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lapel pin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alumni magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Invitation to donor recognition event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free membership in Lifelong Learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Athletic ticket assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fine arts ticket assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your level of satisfaction with the following Lourdes University fundraising events.

	Never attended	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied
Lourdes Luminations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hit the Links	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Celebrity Wait Night	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please indicate your level of satisfaction with the following Lourdes University events.

	Never attended	Very dissatisfied	Dissatisfied	Satisfied	Very satisfied
Alumni Association events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Athletic events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visual and performing arts events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other university events (Magliochetti Leadership Summit, Sister Jane Mary Lecture Series, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you believe the Toledo and surrounding communities have a positive perception of Lourdes University? Please describe in the text box provided below.

Do you think the community perception changed when the name changed from "Lourdes College" to "Lourdes University"? Please describe in the text box provided below.

What motivated you to begin giving to Lourdes University?

What motivates you to continue giving to Lourdes University?

Would you consider Lourdes University when estate planning?

- ☐ Yes
- ☐ No

Who typically approaches you regarding a donation to Lourdes University? (Please provide the name of an individual if applicable.)

With what form of communication are you typically approached regarding a donation to Lourdes University?

- ☐ Mailings (i.e. letters, newsletters)
- ☐ E-mail correspondence
- ☐ Face-to-face communication
- ☐ Campus visit
- ☐ Telephone

What is your preferred method of donor-related communications?

- ☐ Mailings (i.e. letters, newsletters)
- ☐ E-mail (i.e. e-newsletters)
- ☐ Face-to-face communication
- ☐ Campus visit
- ☐ Telephone
- ☐ Facebook
- ☐ Twitter
- ☐ Instagram

If you would prefer a method of communication not listed above, please explain in the text box provided below.

How frequently would you like to receive donor communication?

- ☐ Once a month
- ☐ Quarterly
- ☐ Semi-annually
- ☐ Annually
- ☐ Never

Please indicate how connected you feel to the Lourdes University community.

- ☐ Not at all connected
- ☐ Somewhat connected
- ☐ Connected
- ☐ Very connected

Please indicate your affiliation with Lourdes University below (select all that apply).

- ☐ Alumni
- ☐ Parent of a current student
- ☐ Parent of an alumni
- ☐ Grandparent of a current student
- ☐ Grandparent of an alumni
- ☐ Friend of Lourdes
- ☐ Volunteer
- ☐ Other

If "Other", please describe your affiliation in the text box provided below.

Have you ever been asked to volunteer at a Lourdes University function?

☐ Yes

☐ No

If you have volunteered, please indicate the function in the text box provided below.

What could Lourdes University do to enhance donor communication?

What do you feel Lourdes University could do to engage prospective donors?

Gender

- ☐ Female
- ☐ Male

Please indicate the selection which best represents your age group.

- ☐ 20-29
- ☐ 30-39
- ☐ 40-49
- ☐ 50-65
- ☐ 65+

Please indicate your highest earned degree

- ☐ High school or GED
- ☐ Some college
- ☐ Bachelor's degree
- ☐ Master's degree
- ☐ Doctorate degree
- ☐ Prefer not to disclose

Marital status

- ☐ Single
- ☐ Engaged
- ☐ Married
- ☐ Divorced
- ☐ Widow/Widower
- ☐ Prefer not to disclose

Please indicate number of children, if applicable.

Please indicate number of grandchildren, if applicable.

Please select the religious denomination with which you most closely affiliate.

- ☐ Catholic
- ☐ Christian
- ☐ Jewish
- ☐ Muslim
- ☐ Atheist
- ☐ Agnostic
- ☐ No particular affiliation
- ☐ Other

If other, please indicate in the text box provided below.

Please indicate your profession below (be as descriptive as possible).

Please indicate your total household income by selecting one of the following.

- ☐ less than \$30,000
- ☐ \$30,000-\$60,000
- ☐ \$61,000-\$99,000
- ☐ \$100,000-\$150,000
- ☐ \$151,000-\$250,000
- ☐ \$251,000+
- ☐ Prefer not to disclose

Please indicate your annual charitable contributions (including Lourdes University).

- ☐ \$250-\$1,000
- ☐ \$500-\$1,000
- ☐ \$1,000-\$5,000
- ☐ \$10,000-\$25,000
- ☐ \$25,000-\$50,000
- ☐ \$50,000+
- ☐ Prefer to not disclose