Transformational Philanthropy in Academia:
Fundraising Tools for Institutional Advancement

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The study investigated the philanthropic impediments faced by Newman University Advancement Department. Over the past several years, the lack of financial support, alumni and donor contributions exposed the university to certain financial risks and deficits. Newman's steady decline in student enrollment and tuition revenue increased the need for philanthropic contributions from private sources. Newman's alumni giving was at 4%, which was well below industry standards for Higher Education Institutions (HEI). Foundations and individual giving by alumni and non-alumni to Higher Education make up the most significant component of higher education philanthropy (Osili, 2019, p. 6).

The literature review revealed many challenges faced by higher education institutions. These challenges have forced private universities in the U.S. to look beyond the traditional paradigms and frameworks for obtaining philanthropic resources. Declining state revenue, increased expenditures and rising tuition costs at private and public universities are critical issues heightened by the current economic environment (Powell & Rey, 2015a, p. 94). The researcher selected Resource Dependence Theory (RDT) based on its emphasis on understanding the environmental elements in acquiring fundamental resources for building institutional capacity. The RDT framework contained four imperatives and had implications for successful strategic planning efforts (Pfeffer & Salancik, 1978, 2003), and institutional survival and sustainability. Dean (2007) states that resource dependence theory best explains the phenomenon of fundraising in higher education.

Four research questions guided the project at Newman. *First, what are the contributing factors that are influencing the low level of philanthropic giving to Newman University? Second, what role should Newman's leadership play to maximize successful fundraising outcomes? Third, to what extent*

does Newman University maintain inter-organizational relations with its community and philanthropic organizations? Fourth, how can Newman University diversify its fundraising efforts for greater impact?

The researcher identified, explored, and focused on factors that would improve philanthropic giving to the institution. The findings provided insight for institutional leaders into the role philanthropy plays in achieving Newman's mission. The functions of institutional advancement, specifically its donor cultivation and fundraising, alumni relations, public relations, and marketing were assessed. Newman's procedures and operational processes were also evaluated to understand the lack of philanthropic support from its alumni and donors. The structure and capabilities of the advancement office was examined to establish goals and strategies for future success. The purpose was to identify the misalignment of skillsets and deficiencies in the institution.

The study employed qualitative data collection and analysis. A qualitative design was appropriate for exploring and interpreting meanings from people's experiences, beliefs, and perceptions (Holloway & Galvin, 2017). The researcher used three methods of data collection: examination of primary documents, participant observation in meetings, and in-depth, open-ended face-to-face interviews with 15 staff members, alumni, volunteers, and students working with Newman University's Advancement Department. Participant observation and open-ended interviews provided raw qualitative data for the researcher to code for dominant themes and patterns. Thematic codes emerged as themes and subthemes that were named and defined with increasing specificity. The final narrative included quotes from the participants, using participant pseudonyms with no identifying information attached to the interviewee.

Research Question 1

The first research question identified *the contributing factors influencing the low level of philanthropic giving to Newman University*. The study found that organizational effectiveness was the primary factor. Ten subthemes supported the criterion for this finding: disorganization, lack of cohesion, insufficient training, failure to fill key positions, staff spread too thinly, unclear division of responsibilities, data mismanagement, donor stewardship, outdated software, and problems engaging alumni.

Finding 1: Organizational effectiveness.

Fifteen out of the 15 participants detailed limitations in organizational effectiveness that thwarted the Advancement Department's objectives. Research participants depicted the department in a frazzled state. Many staff members were unsure of their roles and responsibilities. Untrained staff struggled to fill critical roles like grant writer or were left guessing how to perform vital tasks such as donor stewardship. Data mismanagement was the most alarming aspect of the organization's ineffectiveness. The outdated CRM software program Raiser's Edge was full of glitches and technological inadequacies that gifts were misplaced, which meant that donors would not receive the appropriate stewardship such as letters of appreciation. Additionally, there was no official check handling protocol. The study also found that the school did not effectively solicit alumni because there was no established culture of alumni giving.

Research Question 2

The second research question targeted the *role Newman's leadership should have in maximizing successful fundraising outcomes*. The data established the theme environmental impact. Nine out of 15 research participants provided interview narratives developing the subthemes: establish a strategic

fundraising plan, restoring a positive image, hiring staff, and invest in cultivating alumni and student engagement.

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Finding 2: Environmental Impact.

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The finding and subthemes demonstrate ways for Newman to exercise agency in an uncertain environment. Given that one of RDT's primary objectives is establishing goals (Pfeffer & Salancik, 1987), a strategic plan would help the university manage its environmental impact. Research participants indicated a need to garner more positive attention. Presenting a positive image to the public asserts legitimacy and, by correlation, builds donor confidence (Scott & Davis, 2007; Thompson, 1967). Strategically hiring staff such as a grant writer will allow the Advancement Department to focus on fundraising objectives set in the strategic plan. Finally, interviewees noted a breakdown in relationships among students, alumni, and the university, which reveals the school's inability to control its environmental impact. The literature maintains that getting students and alumni involved in university activities will create a desire to give back (Drezner & Huehls, 2014).

Research Question 3

The third research question asked *to what extent Newman University maintains inter-organizational relations with its community and philanthropic organizations*. The finding demonstrates that Newman's minimal level of inter-organizational relations with community and philanthropic organizations has produced problems obtaining resources. Five subthemes were used to establish the finding: enhancing philanthropy, donor cultivation, fundraising strategies, lack of inter-organizational cohesion, and cultivating student and alumni relationships.

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Finding 3: Problems Obtaining Resources.

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Organizations must foment relationships of interdependence with community and philanthropic organizations to offset problems obtaining resources in higher education

(Kirschner, 2012; Powell & Rey, 2015). All respondents interviewed for the research discussed means of philanthropy that could be developed to boost revenue for Newman, including donor cultivation and fundraising strategies. During times of financial instability, organizations must reach out to philanthropic entities like foundations and corporations to develop new private sector partnerships (Powell & Rey, 2015a). Ten out of 15 respondents noted organizational divisions across campus, which prevented the university from functioning as the sum of interconnected parts (Birnbaum, 1988). Problems attracting alumni and student giving hinged on the university's failure to establish mutually beneficial relationships before soliciting donations.

Research Question 4

Research question 4 asked *how Newman could diversify its fundraising efforts for greater impact.* The finding, environmental constraints, was generated based on the subthemes reassess outreach and communications strategies, support students and alumni, and focus on Newman's unique identity.

Finding 4: Environmental Constraints.

RDT notes that organizations must identify and assess their environmental constraints to make informed decisions about a course of action that highlights the organization's competitive advantage (Pfeffer & Salancik, 1978). The study found adaptive advantages and weaknesses given the environmental constraints. Six out of 15 Newman employees signaled the need to reassess and build on the university's outreach and communications strategies, such as social media. Their suggestions coincided with Osili's (2019) assertion that universities engage technology to reach a larger, younger generation. The finding pointed to a cultural shift in funding in which philanthropists are more interested in investing in technological campaigns to "create tomorrow," as opposed to "save the day" gifts (Powell & Rey, 2015). Nine out of 15 respondents suggested

supporting students and alumni from the time they are recruited to after graduation. Maintaining professional engagements and aiding student success with career guidance should be foundational to that objective. Focusing on Newman's unique identity, as discussed by 12 of the 15 participants, was another way to diversify Newman's fundraising efforts given the environmental constraints. Respondents were particularly vocal about embracing Newman's family friendly and inviting community and engaging the school's Catholic mission. The finding dovetailed previous scholars indicating identity-based fundraising is a new, compelling fundraising strategy (Drezner 2018; Drezner & Huehls, 2014).

RECOMMENDATIONS

In consideration of the study's findings, it is recommended that Newman University Advancement Department partner with University Relations to develop, communicate and enhance Newman's image and reputation. The goal is to build and cultivate relationships with its constituents, and secure philanthropic investments that are fully aligned with Newman's mission, strategic goals, programs and students. Newman's Advancement Department must develop and cultivate relationships with students/parents, alumni, individual donors, foundations, corporations and the extended community.

Recommendation 1: Draft a strategic fundraising plan.

The Advancement Department was rudderless without a strategic fundraising plan. A successful strategic plan is essential in fundraising for higher education given the tendency of universities to focus on specific processes and not long-term considerations (Duderstadt & Womack, 2003, as cited in Powell & Rey, 2015b, p. 96).

Recommendation 2: Implement organizational effectiveness.

Newman should continue to build its Advancement Department with attention to clarifying roles and responsibilities, developing a team of competent staff, and designing integrated infrastructure. Using the strategic fundraising plan, the department can reshape its organizational structure and communicate its purpose, goals, and administrative architecture.

Recommendation 3: Prioritize data management.

It is recommended to overhaul Newman's data management. Newman should implement a rigid data management protocol outlining which employees handle donations and how. The school should upgrade its CRM system Raiser's Edge for grants management and donor cultivation.

Recommendation 4: Enhance the philanthropic culture at Newman.

It is recommended that Newman University enhance its philanthropic culture. Newman should foster partnerships across its campus to increase productivity and participation in philanthropy (President, Provost, Deans, Board, Alumni, and Students). Moreover, the school must look to new funding partners, such as foundations and corporations.

Recommendation 5: Cultivate student and alumni bond to alma mater.

Newman should broaden and deepen constituent engagement and develop meaningful relationships with alumni, students/parents, and community. These efforts should frame the school as a family-friendly and tight knit community.

Recommendation 6: Revise communication strategy.

It is recommended that Newman raise awareness and increase advocacy for the University, leading to widespread recognition of the school's core values, teaching, learning and service excellence to improve adherence to Newman's brand identity and brand standards

SUMMARY FINDINGS MATRIX

Table 1 provides a comprehensive overview of the relationship between findings from the study and dimensions of Resource Dependence Theory (RDT).

Table 1. *Resource Dependence Theory (RDT) Summary Findings Matrix*

Research Questions	Resource Dependence Theory (RDT) Perspective	Findings Themes/Subthemes	Recommendations

RQ1: *What are the contributing factors that are influencing the low level of philanthropic giving to Newman University?*	Organizational Effectiveness	1. Organizational Effectiveness
		  o Disorganization
		  o Lack of cohesion
		  o Insufficient training
		  o Failure to fill key positions
		  o Staff spread too thinly
		  o Unclear division of responsibilities
		  o Data mismanagement
		  o Donor stewardship
		  o Outdated software
		  o Problems engaging alumni
			1. Draft a strategic plan
			2. Implement Organizational effectiveness
			3. Prioritize data management

RQ2: *What role should Newman's leadership play to maximize successful fundraising outcomes?*	Environmental Impact	2. Environmental Impact
		  o Establish strategic fundraising plan
		  o Restoring positive image
		  o Hiring staff
		  o Invest in cultivating alumni and student engagement
			4. Enhance the philanthropic culture at Newman

RQ3: *To what extent does Newman University maintain inter-organizational relations with its community and philanthropic organizations?*	Problems Obtaining Resources	3. Problems Obtaining Resources
		  o Enhancing philanthropy
		  o Fundraising strategies
		  o Donor cultivation
		  o Lack of inter-organizational cohesion
		  o Cultivating student and alumni engagement
			5. Cultivate student and alumni bond to alma mater

RQ4: *How can Newman University diversify its fundraising efforts for greater impact?*	Environmental Constraints	4. Environmental Constraints
		  o Reassess outreach and communication strategies
		  o Support students and alumni
		  o Focus on Newman's unique identity
			6. Revise communication strategy

Institutional Advancement offices at colleges and universities are tasked with motivating alumni, donors and friends of the institution to make financial contributions. The questions of why donors give freely and how to encourage them to make annual and major financial contributions are the basis of building a good fundraising strategy. What motivates alumni and other donors to make financial contributions to their alma mater has been a topic of much research stemming from multiple disciplinary perspectives (Drezner & Huehls, 2014, p. 1). Rowland (1986) defined institutional advancement as an all "encompassing activity and program undertaken by an institution to develop understanding and support from all its constituencies in order to achieve its goals in securing such resources as students, faculty, and dollars" (Alphin Jr. et al., 2016, p. 4).

Although Newman University provided benefits of a private university while achieving a higher rate of student success and career placement for its alumni, at 4% its giving was well below industry standards for HEIs. Research demonstrates that the fundamental goal of alumni relations is to cultivate and build lifelong relationships with alumni who can give financial contributions to the institution. Drezner (2008, 2009, 2011, 2013a) finds that it is this "bond to alma mater" that develops and enhances organizational identity through stimulating the interest of students while they are enrolled at member institutions (Drezner & Huehls, 2014). To secure the university's intended future endeavors, alumni must be involved. As a result, a two-way relationship should be developed in a way that is relevant and meaningful for both parties (Schmidt, 2018). Additionally, Institutional Advancement is responsible for all activities undertaken to develop understanding and support among its various students, faculty, staff, alumni, parents, and friends. These activities include fund development, marketing,

communications (publications and public affairs), and alumni relations (McAlexander et al., 2014, p. 244).

<div align="center">ORGANIZATIONAL CONTEXT</div>

Founded in 1933, Newman University is a private Catholic University with strong values and principles. Newman holds tremendous respect for all of its diverse student population's faith traditions. The main campus is located on 61 acres, in an urban setting in Wichita, Kansas. Newman has additional outreach sites positioned in Southeast Kansas, Western Kansas, Colorado, and Oklahoma. Newman operates on a semester-based academic calendar. Its mission statement is identified as, "Newman University is a Catholic university named for John Henry Cardinal Newman and founded by the Adorers of the Blood of Christ for the purpose of empowering graduates to transform society." Newman seeks to educate the whole person. A firm grounding in the liberal arts strengthens all of its programs and instills habits of lifelong learning that accompany graduates as they pursue a variety of personal, academic, and professional goals (Newman, 2020).

Newman University's student body is diverse in terms of ethnicity, age, geography, and degree interest. The total enrollment, both undergraduate and graduate is 3,205 students, with a gender distribution of 38% male students and 62% female students (U.S. News, 2020). This includes 2,705 undergraduate students, and 500 graduate students. The student population enrolled by race and ethnicity is 69% White, 12% Hispanic or Latino, 6% Asian, 3% Black or African American, 4% two or more races, 2% nonresident alien, 1% American Indian or Alaska Native, and 0% Native Hawaiian or Other Pacific Islanders (IPEDS, 2020). The student-faculty ratio at Newman University is 12:1, and the school has 65.7% of its classes with fewer than 20

students. The average freshman retention rate, an indicator of student satisfaction, is 76% (U.S. News, 2020).

PROBLEM OF PRACTICE

The problem of practice for Newman University's Advancement Department focused in its inability to consistently achieve its fundraising and philanthropic objectives. Over the past several years, the lack of financial support, alumni and donor contributions exposed the university to certain financial risks and deficits. Newman's need for increased revenue from private resources stems from the steady decline in student enrollment and tuition revenue. Voluntary support represents charitable gifts from individuals and organizations as well as qualified grants from private foundations (CASE, 2020). Amid declining state funding and falling enrollment, building a motivated donor base is critical to the financial health of higher education institutions. As the second-largest source of higher education contributions, alumni are an indispensable source of revenue for institutions. In 2017, alumni giving accounted for 26.1% of all higher education donations, totaling $11.37 billion, an increase of 14.5% from 2016 (Hanover Research, 2018).

While alumni often serve as the primary fundraising constituency for colleges and universities, private giving from parents, community members, as well as athletic fans, has been expanding sources of support for institutions of higher education during the era of public austerity and private abundance (Proper & Caboni, 2014). Advancement includes the many ways a university plans to move from where it is today to where it would like to be in the future. Getting to that point requires intensive planning and thorough marketing efforts. It should be a very well-thought-out process involving development programs, marketing communications, and school admission (Schmidt, 2018).

PURPOSE OF THE STUDY

The purpose of the study was to investigate the philanthropic impediments faced by institutional advancement departments, specifically Newman University. The researcher identified, explored, and focused on factors that could improve philanthropic giving to the institution. The results of this study provided insight for institutional leaders into the role philanthropy plays in achieving Newman's mission. The study explored functions of institutional advancement, specifically its donor cultivation and fundraising, alumni relations, public relations, and marketing. Newman's procedures and operational processes were examined to understand the lack of philanthropic support from its alumni and other sources of donors.

The researcher conducted an assessment of the structure and capabilities of the Advancement Department to establish goals and strategies for future success. The purpose was to identify the misalignment of skillsets and deficiencies in the institution. As part of a comprehensive strategic fundraising plan, research shows the importance of incorporating strategies and technology platforms that focus on evidence-based data, best practices, and the impact of private giving by alumni, foundations, corporations, and individuals. The research shows the significance of the alignment of trustees, board and staff around core concepts and values of philanthropy.

LITERATURE REVIEW

Role of Philanthropy in Academia

The study of philanthropy as a distinct scholarly field of inquiry within higher education administration is a relatively new phenomenon (Proper & Caboni, 2014). Notably, the growing interest in the study of philanthropy has led fundraising professionals to examine the role and function of institutional advancement, a field that includes fundraising, alumni relations, public

relations, and marketing (Chan, 2016, p. 4). O'Sullivan (2017) states "Institutional advancement is a holistic concept that refers to the entire fundraising practices for a university. When the term is employed, the intent is to mobilize an entire institution's philanthropic approaches and strategies so that they are employed on a singular path (Worth, 2002; as cited in O'Sullivan, 2017, p. 40)." Within the fundraising cycle in Figure 1, fundraising occurs in five fundamental phases or stages: 1) identification of potential donors through donor prospect research, 2) cultivation, or relationship building with prospective donors, 3) solicitation, or asking prospective and existing donors for gifts, 4) recognition, or proper thanking of donors, and
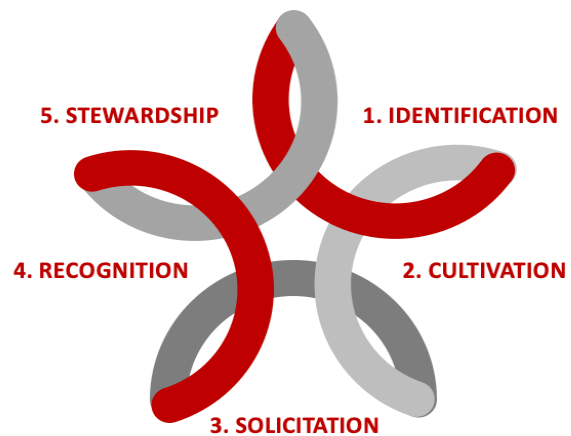
Figure 1. *Fundraising Cycle*

5) stewardship, or keeping donors updated on outcomes associated with their gifts and meaningfully involved in the organization they have supported. The fundraising cycle is a method of finding and developing relationships with people and organizations that are first-time donors. It also guides fundraisers in maintaining relationships with existing donors so they continue to give gifts over time (Hunsaker & Bergerson, 2018, p. 79).

Once a financial contribution is made to an institution, the goal of the fundraiser is to preserve the donor relationship through the stewardship process (Harrison, 2014). Donors of transformative gifts are increasingly savvy and sophisticated, and failing to effectively engage them in how their gift is being put to work severely diminishes their gift experience. At its core, sound stewardship is the hallmark of a high-performing, donor-centered fundraising operation (Walker, 2019).

Impact of Philanthropy

As financial aid support declines and tuition rates continue to rise, colleges and universities have grown much more dependent on the increased philanthropic involvement of the wealthy to fund academic and professional programs, to raise college participation and completion rates, and to build state-of-the-art facilities for high quality teaching and research in higher education (Chan, 2016, p. 2). These voluntary actions performed by philanthropists and the wealthy are often viewed as heroes of the 21st century, whose gifts have fueled the advancement of lifelong learning in higher education. As philanthropy research has moved from once being increasingly atheoretical to now university-based scholarship (Drezner & Huehls, 2014), bridging new ideas and theories into university practice is vastly needed to help teacher-scholars and advanced practitioners conceptualize organizational behavior and their effectiveness to organizational performance in higher education (Bastedo, 2012; Dee, 2014; Kelly, 2002, as cited in Chan, 2016, p. 2).

Higher education institutions would also benefit from taking greater advantage of expanded fundraising tools such as impact investing, online campaigns, and cause marketing. New vehicles and platforms are attracting more interest in philanthropy because of their potential to achieve scale and reach younger and previously untapped audiences (Osili, 2019, p. 10). Traditionally, the partnership between foundation and higher education has made possible an excellent system of higher learning in the United States (Thelin & Trollinger, 2014). Such tradition has helped board of trustees, the president, and development professionals to bring remarkable resources and wealth to higher education organizations across the United States and abroad (Alphin Jr. et al., 2016). As a result of declining public funding, private philanthropy plays an integral role for both public and private institutions. Research has shown that at least

one-third of America's top universities research budgets are funded through philanthropic contributions (Murray, 2013).

According to the Council for Advancement and Support of Education (CASE), contributions to higher education institutions grew 6.1 percent in fiscal year 2019. CASE Voluntary Support of Education (VSE) survey data revealed that voluntary support of U.S. higher education institutions reached $49.60 billion in 2019 (CASE, 2020).

Table 2. *CASE VSE 2020 survey*

Estimated Voluntary Support of Higher Education by Source and Purpose, 2018 and 2019
(Dollars in Millions)

	2018		2019		Percentage Change 2018 to 2019	
	Amount Raised	Percentage of Total	Amount Raised	Percentage of Total	Current $	Adj. for Inflation
Total Voluntary Support	$46,730	100.0	$49,600	100.0	6.1	3.6
Source						
Alumni	$12,154	26.0	$11,200	22.6	-7.9	-10.1
Nonalumni Individuals	8,567	18.3	8,300	16.7	-3.1	-5.5
Corporations	6,732	14.4	6,800	13.7	1.0	-1.4
Foundations	14,010	30.0	17,000	34.3	21.3	18.4
Other Organizations	5,266	11.3	6,300	12.7	19.6	16.7
Purpose						
Current Operations	$27,400	58.6	$28,500	57.5	4.0	1.5
Capital Purposes	19,330	41.4	21,100	42.5	9.2	6.5

Foundations consider a variety of factors when deciding the types of grantees they will support through their higher education strategy. Private foundations make grants directly to colleges, universities and other organizations that serve students and conduct research on effective practices in higher education, as well as intermediary institutions, such as associations and networks of schools. Survey results indicate that a majority of private foundations active in higher education make grants directly to colleges and universities (RPA & TIAA, 2019, p. 2). In addition to supporting the expansion of facilities and supplying risk capital for research and

curriculum development, philanthropy contributes to financial aid for low-income students and others who face barriers to accessing and completing college. Thus, giving to higher education provides improved economic opportunity and strengthens America's civic and economic fabric (Osili, 2019; Thelin & Trollinger, 2014). Across the sector, fundraising is expanding dramatically as more universities and colleges realize the transformative role philanthropy can play, and the benefits it affords students and academics through increased engagement between institutions and donors (Proper & Caboni, 2014).

Rockefeller Philanthropy Advisors (RPA) and the Teachers Insurance and Annuity Association of America (TIAA) Institute study investigated the patterns in foundation grantmaking to colleges and universities in the United States. One of the study's goals was to provide insight on the funding approaches and program areas of interest to leading private foundations that support higher education. The research identified five key areas of funding for postsecondary education: student access and success; policy, advocacy and system reform; educational activities; campus infrastructure; and institutional stability (RPA & TIAA, 2019, p. 7). The study demonstrates that foundations' major priority areas for funding included supporting low-income, first generation, and minority students' access to affordable and sustainable postsecondary education and ensuring successful completion; and strengthening students' professional skills and career trajectories after graduation in order to train and retain the workforce in their geographic regions, among others (Giving USA, 2020, p. 192).

Identity and Philanthropic Giving

Drezner (2018) states that scholars have pointed to links between identity and philanthropic giving. An emerging approach, both within the more general philanthropic literature and within the subfield exploring giving toward higher education, is identity-based

fundraising (Drezner & Huehls, 2014). Often grounded in social identity theory (Tajfel & Turner, 1986), the identity-based fundraising literature has shown that donors' identities are a factor in their decisions to give and in how those gifts are manifested (Drezner, 2013). Scholars have suggested at least three reasons why identity affects philanthropic giving. First, shared identity creates a sense of a collective (Flippen, Hornstein, Siegal, & Weitzman, 1996). Second, interdependence drives prosocial behaviors (Penner, Dovidio, Piliavin, & Schroeder, 2005). Third, people are more sympathetic toward those who are closer to them (Small, 2011, as cited in Drezner, 2018a, p. 262). Figure 2 depicts elements of Newman University's identity-based giving.
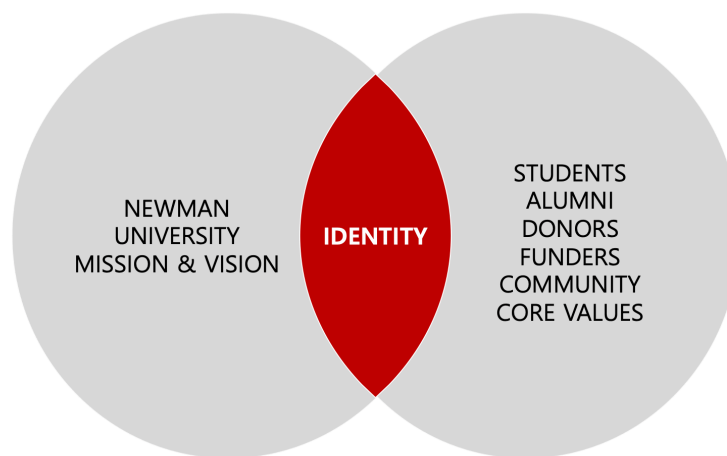
Figure 2. *Newman University Identity-Based Giving*

Research revealed that various scholars have also explored the importance of identity within philanthropy toward higher education along the lines of race and ethnicity (e.g., Cabrales, 2013; Gasman & Anderson-Thompkins, 2003; Tsunoda, 2013), ability (e.g., Drezner, 2005), religion (e.g., Gasman, Drezner, Epstein, Freeman, & Avery, 2011), and sexuality (e.g., Drezner & Garvey, 2016; Garvey & Drezner, 2013). Overall, scholars have found that when institutions engaged donors' social identity, giving increased. The vast majority of this work has been based

on qualitative methods, largely providing rich descriptions of motivations among specific groups (Drezner, 2018a, p. 262).

As colleges and universities grapple with a philanthropic agenda, both financially and politically, fundraising professionals are highly dependent on large-scale philanthropic organizations and private donors to sustain and transform American higher education against the growing state disinvestment for postsecondary education. Specifically, leaders of higher education must establish cooperative arrangements with philanthropic organizations (e.g., foundations, corporations), external groups, and/or community supporters to acquire the necessary resources for innovation and growth within its organization and field levels (Alphin Jr. et al., 2016).

Research shows that contributions to colleges and universities in academic fiscal year 2019 were at the highest levels ever recorded by the CASE VSE survey. The VSE survey found that giving by foundations grew 21.3 percent, far more than other sources of giving, and represented 34.3 percent of total giving to higher education institutions in academic fiscal year 2019. The largest foundation gift, Michael Bloomberg Philanthropies' $1.2 billion grant to Johns Hopkins University, was four times larger than the next largest foundation grant and helped drive growth in total giving. Large gifts were plentiful in 2019, with the survey reporting that eight single donors gifted $100 million or more, for a total $2.21 billion or 4.5 percent of the amount raised by all institutions. The VSE survey also revealed that giving by individuals declined. Alumni support, representing 22.6 percent of the total in academic fiscal year 2019, fell 7.9 percent. Giving by non-alumni also declined by 3.1 percent. Still, gifts from foundations and individuals accounted for nearly three quarters of total giving to higher education institutions (Giving USA, 2020, p. 177).

Resource Dependence Theory

Traditionally, the partnership between foundations and higher education has made possible an excellent system of higher learning in the United States (Thelin & Trollinger, 2014). These partnerships underscore the external dependencies described by Resource Dependence Theory (RDT). The concept of RDT is based on the premise that educational organizations are highly dependent on resources from outside sources (e.g., state, professions, donors) as a result of resource scarcity and conflicts in today's global economy (Pfeffer & Salancik, 1978; Sherer & Lee, 2002). Jeffrey Pfeffer and Gerald Salancik (1978) are the two main theorists who developed the lens of RDT to explain the behavior, structure, stability, and change of academic organizations. They argue that in complex environments, academic organizations are highly dependent upon members of its environment as a result of competition and efficiency (Alphin Jr. et al., 2016) .

As higher education institutions seek to acquire resources that are "self- sustaining" or sustainable, leaders of higher education (e.g., trustees, president, development professionals) are required to maximize their autonomy (e.g., freedom to make decisions) and legitimacy (i.e., influence) from outside groups to ensure short-term and long-term survivability (Scott & Davis, 2007; Thompson, 1967). This is highly evident in many U.S. colleges and universities, whereby boards of institutions seek financial resources from their external partners (e.g., alumni, donors, community partners, corporate partners) and community supporters (e.g., state legislators, governors, mayor) to achieve organizational survival and success (Alphin Jr. et al., 2016).

The research revealed many challenges faced by higher education institutions. These challenges have called for public and private universities in the U.S. to look outside of traditional

paradigms and frameworks for obtaining philanthropic resources. Declining state revenue, increased expenditures and rising tuition costs at private and public universities are critical issues heightened by the current economic environment (Powell & Rey, 2015a, p. 94). RDT was explored due to its emphasis on understanding the environmental elements to acquire essential resources for institutional capacity building. This element is imperative and has implications for successful strategic planning efforts (Pfeffer & Salancik, 1978, 2003) and institutional survival and sustainability. Successful strategic planning is crucial in higher education given the mixed success of past efforts and the tendency of universities to focus on specific processes and not long-term considerations (Duderstadt & Womack, 2003). Despite the importance of the environment for organizations, limited attention has been focused on this area (Pfeffer & Salancik, 2003). Therefore, the actions executed by organizations can be better understood by knowing something about the organization's level of effectiveness, the organization's environment, the problems it creates for obtaining resources, and the contingencies and constraints deriving from that environment (Pfeffer & Salancik, 1978, 2003). In order for higher education institutions to flourish and remain competitive in an ever-changing

economic environment, various models and perspectives must be considered (Powell & Rey, 2015a, p. 98).

THEORETICAL FRAMEWORK

Resource dependence theory (RDT) provided the most appropriate theoretical framework for a study on fundraising and philanthropic giving to Newman University. Dean (2007) states that RDT may best explain the phenomenon of fundraising in higher education. The following diagram in Figure 3 highlights the RDT perspective for understanding the higher education environment and building resource capacity. Powell and Rey's (2015) study explored RDT's

four themes: (1) environmental effects on organizations; (2) organizational efforts to manage environmental constraints; (3) how environmental constraint affects internal organizational dynamics; and (4) problems it creates for obtaining resources.
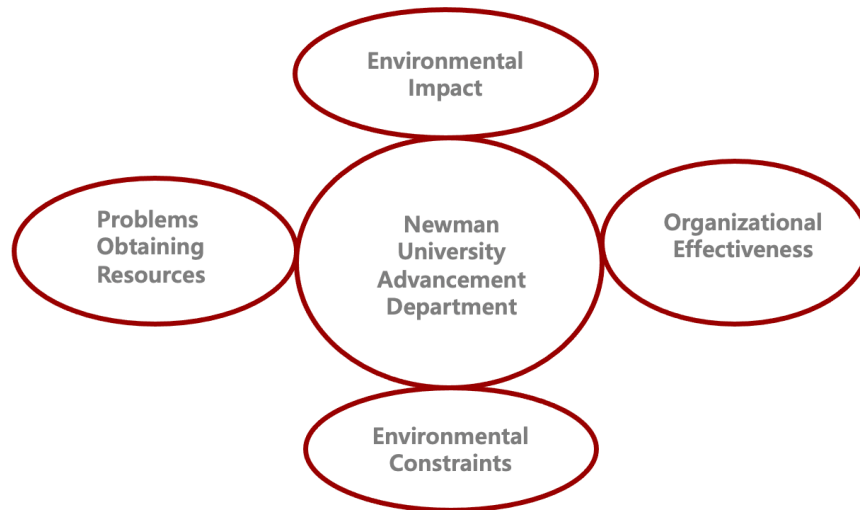
Figure 3. *Resource Dependence Theory Framework (Powell & Rey, 2015b)*

The study revealed that by providing a RDT perspective, higher education institutions can enhance strategic planning efforts and glean applicable strategies to mitigate challenges, such as financial vulnerability, that are caused by environmental changes (Powell & Rey, 2015a, p. 98).

From a management-based perspective, theorists (e.g. Greening & Gray, 1994; Oliver, 1991) contend that resource dependence is a key factor in the development of organizational strategy. A predominant way in which organizations are viewed as effective is the level in which they are achieving or have achieved a set of goals. A goal-oriented view of organizations is that they are a collection of individual efforts that come together to achieve something that could not be accomplished through individual action alone (Pfeffer & Salancik, 2003). For universities, as well other organizations, organizational effectiveness is achieved through avenues such as strategic planning efforts that are designed to measure and assess specific goals and outcomes (Powell & Rey, 2015a, p. 96). By drawing on open-systems theories (e.g. Katz & Kahn, 1966;

Yuchtman & Seashore, 1967), the RDT framework looks at organizational action through the scope of the environments in which the organization is located and the need to procure resources that derive from that environment (Powell & Rey, 2015a, p. 94).

To successfully employ either one of these strategies, public or private universities need to see themselves as if for the first time and strategically ask: 'What business are we really in? What special role does our university play in the US's higher education network? What attractive and important set of services does our university provide that people cannot obtain elsewhere better, faster, or cheaper? What competitive advantages do we have over approximately similar places? What academic fields and university services will be most needed by the country and our region in the next decade? With our traditions, location, and collection of faculty and administrators, what should our institution be building toward? What should our university aspire to be ten years from now?' An academic strategy that employs a RDT perspective seeks to answer these questions (Keller, 1983, as cited in Powell & Rey, 2015b, p. 97)

RESEARCH QUESTIONS

American institutions of higher education are increasingly dependent on the financial support from alumni, students, donors, board members, foundations and corporations to supplement its institutional operating budgets. The study examined four research questions to guide the project at Newman:

1. *What are the contributing factors that are influencing the low level of philanthropic giving to Newman University?*
2. *What role should Newman's leadership play to maximize successful fundraising outcomes?*
3. *To what extent does Newman University maintain inter-organizational relations with its community and philanthropic organizations?*
4. *How can Newman University diversify its fundraising efforts for greater impact?*

STUDY DESIGN

A qualitative approach was employed in this study. A qualitative design is appropriate for exploring and interpreting meanings from people's experiences, beliefs, and perceptions (Braun & Clarke, 2013; Holloway & Galvin, 2017). The researcher used three methods of data collection: examination of primary documents, participant observation in meetings, and in-depth, open-ended interviews with 15 staff members, alumni, volunteers, and students working with Newman University's Advancement Department. The researcher collected and reviewed documents, classified as, "any written or recorded material" not strategically composed for the researcher's evaluation (Guba & Lincoln, 1981). Specifically, the researcher read and evaluated grant files, survey results, Board meeting reports, and data on past donations, as well as Newman's website, which provided context on the school's mission and operational strategies. When coupled with other qualitative methods, document analysis helps triangulate data to elucidate or expand on findings (Frey, 2018). Participant observation was conducted during three routine staff meetings. Participant observation is "the process of learning through exposure to or involvement in the day-to-day or routine activities of participants in the research setting" (Schensul & LeCompte, 2012, p. 83).

Participant observation allows the researcher to record nuanced field notes on the group's activities and social relationships as well as record communicative exchanges for textual analysis (Bernard, 1998). Open-ended interviews elicited data on perceptions, beliefs, and behaviors linked to fundraising strategies and daily operations. Patton (2014) states that open-ended interviews use broad questions and probes to prompt in-depth responses about people's experiences, perceptions, opinions, feelings, and knowledge. This method of data collection

provides ethnographically thick data, including contextualized quotations, offering sufficient information to be interpretable to the researcher. Participant observation and open-ended interviews provided raw qualitative data for the researcher to code for dominant themes and patterns.

The researcher purposefully sampled Newman University's Advancement Department due to the study's objective to investigate the philanthropic impediments facing the department. To offer practical findings and recommendations relevant to the school's fundraising needs, the researcher sampled and recruited 15 staff members, alumni, volunteers and students who worked with the Advancement Department. The participants represented Newman's President, Dean, Advancement staff, students, alumni, volunteers and board members. These individuals could offer the most valuable interview data on fundraising activities and ethnographic perceptions of the department's activities, with the intent to improve its processes. Moreover, the study population possessed knowledge and experiences relevant to the research questions, and had the capability to communicate their lived experiences and to articulate their opinions in a reflective manner (Bernard, 2006). Upon identifying participants, the researcher invited these individuals to participate in the study. Interviews consisted of 30-60-minute in-person interviews in the office of the participants or conference hall at Newman University, located in Wichita, Kansas. Interviews were recorded on a digital recorder and transcribed in real time using Otter.ai transcription software. Research field notes were taken using pen and paper to supplement the transcribed interview data.

Once all document, interview and participant observation data were collected, the researcher initiated an analysis of their content. Documents were examined to gain empirical

knowledge of philanthropic shortages and to establish operational behaviors. Field notes and transcribed interview data were reviewed for accuracy and uploaded into NVivo qualitative analysis software for narrative and content analysis. NVivo is a qualitative data analysis computer software package that assists qualitative researchers to organize, analyze, and establish meaning from raw data. The qualitative data analysis process was inductive and required the researcher to develop meaningful categories based on specific interview data (Creswell & Creswell, 2018, p. 248). The researcher read the transcripts and highlighted or "coded" quotes, words, and passages relevant to the four research questions and established general patterns in the content. Those codes emerged as themes and subthemes that were named and defined with increasing specificity. After all transcript files were coded, the researcher used descriptive statistics to determine whether the codes could fit into larger thematic and cognitive categories. The frequency tables showing the categories generated by the statistical analysis are shown in the findings section. When all codes were positioned into larger categories, the researchers assessed their relationships among the categories, with the intent to determine overarching themes and subthemes that accurately reflected the coded content. The final narrative included quotes from the participants, using participant pseudonyms with no identifying information attached to the interviewee.

FINDINGS

Research Question 1

The first research question identified *the contributing factors influencing the low level of philanthropic giving to Newman University*. The research finding identified organizational effectiveness, which was supported by ten subthemes: disorganization, lack of cohesion,

insufficient training, failure to fill key positions, staff spread too thinly, unclear division of responsibilities, data mismanagement, donor stewardship, outdated software, and problems engaging alumni. Organizations are considered effective by their ability to achieve goals and their capacity to marshal individual and collective efforts to achieve success for an entire institution (Pfeffer & Salancik, 2003). The finding highlights specific barriers to institutional effectiveness.

Finding 1: Organizational effectiveness.

Subthemes for finding one are presented in frequency **Table 3**.

Table 3. *Themes and Subthemes for Finding One*

Theme/Subtheme	*n*	%
Organizational effectiveness		
Disorganization	15	100
Lack of cohesion	6	40.0
Insufficient training	8	53.3
Failure to fill key positions	9	60.0
Staff spread too thinly	9	60.0
Unclear division of responsibilities	11	73.3
Data mismanagement	9	60.0
Donor stewardship	3	20.0
Outdated software	7	47.0
Problems engaging alumni	8	53.3

Subtheme 1 of finding 1: Disorganization (15 out of 15). All research participants revealed frustrations with disorganization and a lack of clarity within the Advancement Department. Respondents noted that the department was not achieving its goals, in large part due to internal operational weaknesses. For instance, Kyle noted, "I honestly think the whole department needs to be restructured." These problems were pervasive and impacted nearly all aspects of department culture and operations. Interviewees perceived tasks and meetings as valueless. Kyle stated, "We have a development committee, but they're not doing anything." He

confided, "I feel clueless. I just feel like I'm running around like a chicken with my head cut off."

Richard shared, "We feel like the leadership has been lacking because it's been dysfunctional it's no one person's fault it's just been dysfunctional." Maia agreed with Richard's comments. Reflecting on the department's strengths and weaknesses, she said, "I think we can always improve. I don't think we're doing everything right at all." Alex described a free-for-all approach to work projects. "It was just a shotgun approach. No real plan whatsoever."

Subtheme 2 of finding 1: Lack of cohesion (6 out of 15). Newman's fragmented institutional culture hindered the school's organizational effectiveness. For example, Arthur stated, "that's one thing this campus just needs to do better in general is that we're really small campus, but yet, we all kind of work independently. So, like silos, no one knows what the other one is doing." Maia claimed, "I am frustrated that the President isn't listening to the cabinet. And now, the officer in charge doesn't seem to listen and I know two other members are looking for jobs." She continued, "I like getting input from people like having common goals for the team. I give the team credit, but I like to make decisions. I like to make things happen. And when I can't make things happen, I get frustrated." Richard mentioned he goes after a lot of grants. He just "does it on his own."

Kyle also noted departmental divisions that kept him and his colleagues from maximizing philanthropic giving potential. He suggested that leadership's negligence led to withholding key information from him and other staff, "We were colleagues. And I didn't know anything about major gifts. I didn't know anything about grants. She handled it all." The departmental disconnect became clear when the researcher showed Kyle some critical documents and pressed him about whether he was aware of them. Kyle replied:

No, I have never seen those. I'm so confused, and, like I said, I hear everything

secondhand. And I'm thinking, why am I not invited to some of these meetings, there will

be major changes in two weeks, and I have no clue what's going on in these meetings…I

just hate that somebody has all this corporate knowledge and is not sharing it. But no, I've

never seen these before. I need to figure out where you found these, because I've been

looking for grant files.

Communication improvements would help the department strategize for best practices in

approaching donors. Anthony, "We want to know what's going on before we ask someone for

money. In the meeting, say, 'I'm having lunch with so and so this week and I'm going to ask for

X amount of dollars. Let's talk about it." Other times, department staff mentioned differences of

opinion that stalled progress. At the gift officers' meeting, one participant admitted, "Maia and I

are not exactly seeing eye to eye on this." Alex, shared, "I'm kind of in a funny position right

now because two employees are fighting, not really fighting but just really frustrated with some

of the decisions leadership is making in the department. So, I'm kind of in the middle." Without

the ability to work as a team to accomplish goals, the school would fall short of RDT's core

principle of operational effectiveness (Pfeffer & Salancik, 1978; Powell & Rey 2015). Moreover,

the lack of cohesion directly contradicts Birnbaum's (1988) suggestion that universities must

view themselves as holistic systems composed of subunits or subsystems that interact both

among themselves and beyond the university's boundaries.

Subtheme 3 of finding 1: Insufficient Training (8 people of 15). Eight out of 15

respondents (53.3%), reported feeling unprepared for their positions, which left staff feeling

misguided or anxious about their responsibilities. Anthony shared, "I feel like we're finding our

way in the dark sometimes because we've never done it and it's all new." Julia reflected on her

own experience, adding, "I mean, I didn't get a whole lot of training. I still have questions about that stuff I should know by now. Just how everything works." Her training period consisted of, "about a week or two of going out with her boss to lunches, and that was about it." She concluded, "I just need to gain experience." Employees yearned for additional training. Alex said, "I just want to learn more. I'm making a list of things like the Raiser's Edge database to learn." He had learned some actions on his own, "I had to transfer a couple credit card payments, things in Raiser's Edge, but I just don't know how, and I don't want to mess it up. I get into it, but I'm afraid, until I get some training." He resolved, "I haven't been here long enough to even know the full processes." Leslie reflected on her own experience as a new employee, "Everything was supposed to be written in a manual, so that way I could know what everybody had done in the past. But it wasn't. So, I had to learn three fourths of it by myself, because one thing that we don't do is we don't cross train." Alex also disclosed that a former employee left him with little guidance when he assumed her job. When asked if the former employee shared a manual to instruct the new hire on protocols, he offered a lackluster response, "she kind of did, she updated a book that she's like 'okay here's the procedures that you do and things,' but it's kind of those one offs like maybe you needed that folder. So, she's helped me I'm very thankful that I can still call her."

Staff often recognized colleagues as well intentioned, yet unfit for a role. Kyle remarked, "I don't know how we are going to use a colleague to be honest with you. I think she's a great person. I just think she wasn't ready for this role." Richard said while the old grant writer excelled at procuring funding opportunities to share with staff, "The new employee was maybe not as familiar with higher education and I think it was a little overwhelming for him. Not that he didn't try I just think that he just wasn't up to speed on it." Employee naïveté compromised high

stakes fundraising opportunities. Anthony recalled that on one occasion, an employee lost a multimillion-dollar donor by broaching a controversial subject matter during the negotiations. He related, "We lost a gigantic donor because a staff member started talking politics. This donor was a multimillionaire and could have just written us a check for something." Maia discussed colleagues who she deemed unfit for their job responsibilities, saying, "Number one they need help. Number two they need to improve their event, it is always a mess at the nametag table."

Subtheme 4 of finding 1: Failure to Fill Key Positions (9 out of 15). The training deficiencies described in subtheme 2 severely hindered fundraising goals because of Newman's poor job retention. At the time of the research, the department was struggling without a grant writer, a key responsibility in fundraising. Kyle said, "I think that the fact that we don't have a grant writer is going to hurt us." Richard remarked, "Typically that's where the grant writer would be, and they would coordinate some of those grants and help us through the process of finding how to connect to funders and donors." In the meantime, a staff member was identifying grants and sending them to faculty to procure their own funding. Richard shared, "We don't know what's available out there. We might come across something and then he'll send out an email to all faculty, if they're interested in the grant." When asked whether he believed it was faculty's responsibility to procure their own grants, Richard replied matter-of-factly, "We do not have a grant writer. And that's a revenue stream. It seems short sighted to me. If we want this university to be successful in the future, we have to invest in a grant writer." As a corrective measure, he thought, "we need to invest in the short term to get us over this hump." Richard also mentioned that students were experiencing the ripple effect of the grant writer vacancy: "You're cutting off all your support and resources. People leave and they're not filling those positions. Students are asking what's happening to my program that I'm majoring in." Still another

respondent, Alex, mentioned a staff member's resignation, which was "kind of a sudden thing." The Advancement Department would likely lose even more operational effectiveness without a leader. Wendy suggested the department would "suffer by not having leadership in advancement."

Another commenter exposed the pervasiveness of Newman's job retention problems. Maia, who worked in Advancement for several years, described the instable climate, recounting the past four staff members who had not worked out. Without a well-equipped and highly trained team of employees, Newman wasn't achieving fundraising potential. The high turnover rate left holes in the department. Even essential roles like grant writing fell to faculty instead of people dedicated to raising funding for Newman University.

Subtheme 5 of finding 1: Staff spread too thinly (9 out of 15). The staff members that remained at Newman attributed organizational ineffectiveness to being burdened with too many responsibilities. Arthur described overworked employees, noting, "Our marketing department is severely overwhelmed, so you find yourself doing your own stuff." Kyle found himself absorbing the department's labor demands. Our department is responsible for providing funding for the entire university, which was not in our job descriptions, and staff felt beyond capacity. Leadership implemented longer work hours (50-60 hours per week) at no additional pay, he lamented:

> We have many different departments come to us. The School of Education wants to start an endowment for Sister Thomasine. Career Services wants our department to look for a $25,000 grant for Jet camp. There's the Investigative Summer STEM Program (ISSP), which is the summer science program that needs funding. We are just a little bit overwhelmed.

If Advancement was interested in fundraising, overburdening employees was a poor strategy. Anthony explained his own situation stating, "I'm running an entire department, you know, and really fundraising is almost a secondary part of what I'm doing. Day to day, all the stuff that comes across my desk or through email...And so, to devote that time, I can do it."

An uncontrolled volume of projects for few staff members was overwhelming the marketing department also. Wendy remarked, "For some print pieces our department have them go directly to the printer because we had 10 other projects on our plate based on our timeline." She also mentioned that the increased volume was a "directive from the board right now." Alex felt increasing demand in his job responsibilities as well. He shared, "I kind of got pushed into various committees and things like that. I got a lot going on now." It's not that the staff wasn't competent in many cases. Maia insisted a particular staff member, "will be good with data, but he doesn't have the time capacity." She added, "We're overloaded. We have a financial crisis here. So, they're putting a lot more on. It's overwhelming."

Based on interviewees' prior experiences and knowledge, the additional responsibilities that staff members held did not appear to be evident at other local universities, thus leaving interviewees to believe that the extra load was unique to Newman. Arthur noted that another local university had more staff to assist in campus-wide activities: "At Wichita State here in Wichita, say a group was coming in for summer camp. There would be a person that they would contract for the dorms, there would be person they would contract for the rooms and a person they would contract for the food. Maybe even a fourth person for the technology." Richard was expecting doubled responsibilities in the near future, once he assumed his new role. He said, "I will be taking on like two or three jobs. I'm still doing my research and teaching a course." He

also indicated the campus-wide prevalence of overworking employees: "I think you probably will find that with so many people here we have our fingers in a lot of different areas."

Subtheme 6 of finding 1: Unclear division of responsibilities (11 out of 15). The department wasn't organized, which left employees confused about their roles and responsibilities. Kyle claimed, "The number one challenge is the lines are not clear of who's doing what. The roles and responsibilities are not clear. I really think we need a point person." Kyle attributed the mishaps to "too many cooks in the kitchen" and reflected on his responsibilities at the university saying, "I'm kind of a jack of all trades and Master of None…I would just appreciate some direction." Kyle continued, "I don't know who's my boss and I don't know who reports to me. I don't even know who's doing what." When asked if she had a job description or whether she actually knew her roles and responsibilities, Julia simply replied, "No," elaborating, "There are times where I do feel lost. Like, what should I do, what should I be doing, but also, Am I doing this right? Am I going about everything right? Am I using my time efficiently?"

> Staff members were frequently moved to different positions after being hired. Such occupational rearranging exacerbated organizational problems. Arthur explained:
> I originally was not hired for this particular position. I don't know if they explained to you how that came about. My title was different, and my job description did not include any of these responsibilities.

The lack of clarity made him uneasy because no one officially pinned down his roles and responsibilities. Arthur described the chaotic situation, insisting, "A frustrating aspect of this job is that I don't have clarification on who exactly I need to report to, if anyone. Clarification would be great." Those sentiments were mirrored in Leslie's comments: "I get confused quite a bit,

because my job title does not reflect my current job responsibilities. But my supervisor often changes my title every time she introduces me. So, I get confused because I don't know what my title is or what my responsibilities are in this department" Madeline helped explain in greater detail from a different perspective:

> To be honest, this year it's kind of been interesting just overall because with so many people gone, we had to figure out who was going to do what. My supervisor tells me what I do day-to-day. At times it is kind of confusing because I don't know who to speak with. Like if I do want to voice my opinion, do I tell a supervisor in this department, or do I talk to someone else. I've always kind of found that a struggle.

> The confusion over responsibilities was not isolated to the Advancement Department. Wendy shared, "Strategic Communications is really reporting directly to the board or to the President, but it just handles itself as a 'we're here as a support group for what your needs are media wise through whatever."

With many crosscutting responsibilities around the department and Newman in general, staff members were not clear on basic work roles. They needed an advisor to clarify their job descriptions and duties. Respondents were unsure where to direct their questions. Without a basic blueprint for their work, organizational ineffectiveness was unavoidable.

Subtheme 7 of finding 1: Data mismanagement (9 out of 15). Nine out of 15 research participants provided interview narratives on Newman University's data mismanagement problems. Data mismanagement issues complicated basic organizational tasks like tracking donations. Most staff members were unaware of how funds were received and tracked. When asked about the donation tracking process, Lisa replied, "I truly don't know. I don't think we have a whole lot of donations. We haven't had consistent focus." Interviewees exposed several

administrative data management deficiencies. For example, the Advancement department never established a check handling protocol. According to the individual responsible for filing checks, Leslie, "There was never a true process in how they were giving me the checks. When I was working upstairs, I would just find them on my chair or on my keyboard." She said that other times, an employee would try to place them in a visible location, but that system also failed. "That created issues because I just didn't know, like, there was no indication that checks were around unless I saw them." Staff members grew frustrated without a trustworthy data management system in place. The staff discussed the issue at a gift's officers staff meeting. Attendees noted that on separate occasions, two donors gave over $1,000 to the athletic Booster Club, which was not reflected in the Raiser's Edge software program. Anthony shared, "We have to know when somebody signs up to donate. That was kind of what they were talking about. It didn't work. So, when he went to sign Maia up, he didn't get anything. There was an error or something."

Establishing a data management procedure was a clear goal for the department. According to Kyle, "that is something that we all need to work harder on. Any staff member that has any contact with donors, needs to be recorded immediately." On two occasions, a human resources employee delivered checks that she'd found misplaced in the hallway. Kyle revealed that the employee responsible for managing the checks was socializing with a colleague in the hallway and "dropped several checks," which he noted was "extremely scary." The mismanagement didn't stop there, however. Kyle shared, "Last Christmas alone, I know $27,500 of the checks were never cashed, just from donors calling me saying, 'Did you receive my most recent check from about a month ago'?" In another example, Kyle remembered a donor who called the university to inquire about her $5,000 donation that was never deposited. The donation

was reflected in the book, but the individual in charge of managing financial gifts was unaware of the check's location until she found it later in the day. Kyle summed up his discontent, saying, "We're not cashing their checks. How embarrassing is it to have to tell people, 'Oh I'm sorry we can't find it, you need to put a stop payment on it, and reissue a check?' We're lucky to get the check in the first place!"

Subtheme 8 of finding 1: Donor stewardship (3 out of 15). Data management mishaps impeded donor stewardship as well. Anthony said, "It's been going on for years. So that's why I think some of our donors get upset because we don't acknowledge them." That was directly related to data mismanagement because they weren't being notified of the donations. Anthony said that normally, when data is managed correctly, "We send the letter that says thank you for your donation, the standardized something or other." Kyle reported a time when a staff member submitted "an online donation of $20. I checked in Raiser's Edge because I didn't see a thank you." Wendy also noted that she'd like to see improvements in the donor stewardship process related to data management.

> Our department needs to be notified as soon as someone submits a form so that we can send them an email right away and let them know what's next. We don't get notified when someone gives to the athletics fund. The Athletic Department obviously gets a report, but we don't get anything. It'd be good to know right away where we could reach out and say thank you.

The misreporting also created problems when fundraisers reach out to donors for donations shortly after they'd given to the university, because those donations are not documented in Raiser's Edge. Kyle recalled one instance in which he reviewed a donor solicitation list and noticed a gentleman who'd given to the university in the last month and had

offered three major donations in the past year. Such disorganization can hinder donor relationships, stewardship and reduce the line of funding to the university.

Subtheme 9 of finding 1: Outdated software (7 out of 15). Newman used a CRM software system called Raiser's Edge. The software was supposed to track donations and warehouse data on funders. Staff members' dissatisfaction with Raiser's Edge was reflected in comments like, "We have the lowest level, the most antiquated version of Raiser's Edge that it basically is just a database" (Kyle) and "We have the most basic version of Raiser's Edge" (Wendy). Staff members disclosed that Raiser's Edge was ineffective and at times misreported critical information on clients and donations. One staff member said, "Raiser's Edge has duplicated a number of our files and records." Leslie commented, "We need to clean up Raiser's Edge. There's just a lot of bad information in there. But nobody has ever had time to really get into the system to clean it up." She said that she recently checked the database for information on an honorary alumnus but, When I went to her record, we usually have those in there as a constituent code. It's nowhere. It doesn't even have it in her attributes where it should be. So, I wouldn't have known. I had to search our website to see if they wrote an article on it and they did.

Whereas other CRM software can perform other tasks like send donor acknowledgments and compose tax letters, Newman's version of Raiser's Edge could not. Leslie explained, "It does not generate a tax letter. I just receive a purchase notification. I don't think with our level of Raiser's Edge. From what I've been told, we can't generate different letters of payment." She mentioned there was talk of the school using another CRM software NXT but said, "I don't care about NXT. We can't afford NXT. I need to know how to do it with Raiser's Edge. The next level is about $15,000 more a year." Julia believed the department's lack of funds was

responsible for the outdated CRM. She shared, "my supervisor decided not to update our database because of expenses."

Subtheme 10 of finding 1: Problems attracting alumni funding (8 out of 15). Eight out of 15 participants discussed alumni issues as central obstacles to Newman's fundraising objectives. According to Drezner (2013), alumni form a key resource for attracting higher education funding. Currently, Newman's alumni engagement hovers around 3-4%, leaving a huge opportunity for improvement. Newman staff recognized the misconnection across all departments. They discussed problems attracting alumni funding, in phrasing like, "Our alumni giving percentage is terrible and engagement is terrible (Maia)" and "the level of contribution from the alumni here is pretty low. Single digit, as I recall. What is it, three percent (Francesca)?" Lisa figured, "I think we have the biggest opportunity to raise money from alumni. Less than 4% of alumni are giving anything at all. And we're in a situation where we really need to tap into people and get them to be giving on a consistent basis." Arthur informed, "We have a tough alumni base to get back here…at least from my knowledge of the past. We'll have a happy hour, every now and then, and that's about it."

Julia described the alumni's lack of allegiance to Newman. The issue centered on the school's persistent quest for donations:

A lot of people are frustrated in some way. Either they feel 'I already spent a lot of money when I attended there since it is expensive, so I don't want to give back.' So that's really how it goes. They don't feel as involved with the school, once they graduate. That's what I've come across…I never felt that way. I think it's once they graduate. It's whenever they're contacted, they expect we're asking for money. 'Can you give a donation'?"

The school desperately needed to tap into the alumni community to generate funds to curtail the economic tailspin. Anthony explained, "We have a lot of alums out there that we have not been engaging with. Many alumni are athletes, "With 330 athletes at Newman, representing 19 sports, he considered athletic alumni to be a part of the solution. "It's a lot, student athletes are 35% of the population."

Research Question 2

The second research question targeted the *role Newman's leadership should have in maximizing successful fundraising outcomes*. The finding identified environmental impact, which accounted for 13 out of the 15 research participants. The four subthemes that contributed to the finding included establish a strategic fundraising plan, restoring a positive image, hiring staff, and investing in cultivating alumni and student engagement. As higher education organizations experience some of the greatest environmental hardships in decades, RDT states that universities must secure a competitive advantage to assert themselves as legitimate institutions producing capable students and products (Powell & Rey, 2015).

Finding 2: Environmental Impact.

Themes for finding two are presented in frequency **Table *4***.

Table 4. *Themes and Subthemes for Finding Two*

Theme/Subtheme	*n*	%
Environmental Impact		
Establish a strategic fundraising plan	8	53.3
Restoring a positive image	3	20.0
Hiring staff	5	33.3
Investing in cultivating alumni and student engagement	8	53.3

Subtheme 1 of finding 2: Establish a strategic fundraising plan (8 out of 15). In the absence of a strategic fundraising plan, the school was losing funding opportunities or engaging

in ineffective activities and unproductive events. Kyle reflected on the department's activities as a waste of time: "I'm trying to think how we benefit, why are we soliciting sponsors for this event." Maia also commented on Newman's poor record of fundraising without an established plan. He explained, "Newman is having zero success in raising the $1.3 million. There was a budget deficit for this year," in part due to poor enrollment. Accomplishing that objective would require a clear plan. Lisa suggested, "We need a strategy that we can actually execute and see some more aggressive results." She believed Newman should concentrate its efforts on:

> Anything in fundraising and the Advancement Department is where we need help. It is important that we increase revenue beyond tuition. We have to actively engage the Board of Trustees in fundraising, growing our Endowment, Planned Giving, and Alumni Giving. Of course, this work will also spill over into the student experience. We need to get more foundation money. I just think there will probably be a broader scope than that.

Newman's current strategy was "not very refined" (Alex). Alex estimated that the strategic plan's "first step would be to research potential funders. Then CRM might be the next step towards meeting funding metrics." Wendy agreed that the school needed a systematic approach: "my idea is just to be more systematic about how to make donor solicitation decisions…where can you have an impact, the big rocks and the low hanging fruit type stuff and then go from there." She added, "We've tried some advertising on the platform and haven't really come up with a strategy that makes an impact."

Such a plan would necessitate raising the bar of current fundraising goals for the Advancement Department. Lisa explained, "part of what I want to happen is to have staff challenged to set higher goals. And to create a team that is aligned with the strategy. We have good people working with us." Julia noted a lack of goals in her role representing fundraising.

"So really not that many goals. We are kind of doing the same goals as the Christmas mailer and everything like that. So, they didn't really give me that many goals, which helps because you know we had party on the plaza, which is a big donation thing, and then we had our benefactors banquet, so we raised a lot of money just doing that. So, we're kind of ahead of our goal. And they haven't really asked that much from me." However, if no goals were established, being ahead of a goal would be impossible. This is a critical flaw given that goal setting is instrumental to overcoming organizational instability (Pfeffer & Salancik, 1978).

Subtheme 2 of finding 2: Restoring a positive image (3 out of 15). Three out of 15 respondents thought that improving the university's image to restore donor's faith in philanthropic contributions would deliver a positive environmental impact. Literature suggests that demonstrating a positive image establishes legitimacy and donor confidence (Scott & Davis 2007; Thompson, 1967). Newman was not cultivating legitimacy, especially in the volatile economic climate in higher education. Richard declared:

> We've been doing lots of research on the faculty and the liberal arts side, because there's been a lot of negative media publicity around the value of higher education in general. It's really caused a crisis. We did so much research over the summer…we surveyed prospective students and did inquiries etc. And it really resonated well with the research that we're finding nationally. The major concern about the value of higher education is high debt.

Wendy also focused on the negative macroeconomic factors facing Newman. "What we have to overcome in this market is cost and perceived value of whether an education from your institution is worth it. So, we're battling that along with some other things." She further explained that, "there are challenges because there's a lot of noise out there so how do you cut

through it. That's sometimes difficult and we don't have enough budget to spend huge amounts of money, to build that from an advertising side so pick and choose targeting." Kyle suggested revamping the school's image through targeted media campaigns in "the Wichita Eagle, the Wichita Business Journal, and Kansas.com." Much of this work concentrates on reframing the narrative on Newman's value.

Subtheme 3 of finding 2: Hiring staff (5 out of 15). Five of the 15 interview respondents mentioned hiring staff as a means to enact an environmental impact. Richard shared, "the biggest thing we need is one person. And then we probably need one to two support personnel, like an additional counselor and additional Career Services person probably those two people, and then coordinator of the program. And I think we can get really far with that." Arthur agreed, saying, "I think it would be fantastic to have a part time person whose main job is dealing with the on campus meetings and events, so that we could focus on bringing in off campus stuff, rental for events and the alumni events, and they can focus on all this on campus, kind of, rinky dink stuff that sometimes consumes staff time." Wendy also mentioned staffing, saying it was a "capacity issue," and wondered, "Could we do more if we had more people? Of course." Perhaps Newman could target volunteers to cover some of those staffing needs. Kyle said, "I don't think we've ever sought out volunteers to help. I think a colleague is trying to work with the board to help connect us with people and add volunteers for single events." However, targeted hiring for faculty would also boost funding objectives by creating a nurturing educational atmosphere worth giving to. Liam explained, "I think, hiring teachers that really care about what they do."

Subtheme 4 of finding 2: Invest in cultivating alumni and student engagement (8 out of 15). Eight out of 15 respondents highlighted the need to cultivate alumni and student engagement. When asked how Newman could accomplish that goal, Liam suggested, "I would just say try to

grow the relationship." His comment implied that the current rapport between students, alumni, and the university was tepid. He was not alone. Arthur shared, "Levy mentioned that after he received his degree, he is not certain of the type of job he can get and needs guidance. He said we don't feel that we get this kind of support at Newman." This is a major inconsistency that contradicts scholarship on the importance of strengthening students' bonds while in school to increase donations after graduation (Drezner 2008, 2009, 2011, 2013a; Drezner & Huehls, 2014). Doing so would almost certainly aid students contending with record levels of post-graduation unemployment and ballooning student debt (Kirshner, 2012).

Newman's staff was aware of the need to cultivate stronger relationships between alumni and staff, which supports Drezner and Huehls' (2014) argument that "bonds to alma mater" develop and enrich organizational identity and should be fostered while students are enrolled. As a leader in alumni matters, Arthur's mission was to "do more between alumni and current students." He described an event that he helped organize to cultivate a bond between alumni and students.

Part of the new effort, Arthur said, should be a more relaxed approach to soliciting funds from alumni. The first task should be establishing a warm relationship: "That's what we're trying to do having these events where it's like not a hard sell, there's no gift to Newman, it's just like, come enjoy fellowship with other alum." That has been a contentious issue in the past and presents an obstacle for neutral camaraderie with alums. That's why Maia suggested that alumni relations cultivate the relationship while the Alumni Board acts as the fundraising vehicle. She called for:

> Getting the Alumni Board involved. I know they don't like to raise money. Let them have
> it be a Giving Tree, where they all get five people to give any donation online, and those

five people get five people, or three, or whatever. I mean, I think that The Board member will need to be the one to ask the Board because they trust her. It's not the office asking, it's the Board member asking, and they respond well to her.

The efforts need to model a ground up approach instead being imposed by administrators or outside entities. The Alumni Board member mentioned in the previous quote suggested, "Building student and alumni relationships has to be done through an internal movement that gets people enthusiastic about engaging themselves, right, and with that comes the commitment, and the long-term commitment." Madeline wanted Newman to begin forming student bonds from students' first step on campus. She insisted, "Now those bonds have been built with people, but as a freshman walking in, you know, you don't know what you're expecting. You have no idea all the activities and time commitments." Julia suggested growing relationships through having more events, saying, "I want their perspective on what they want to see. While continuing to cultivate them, to see how they're doing. We need to have more events."

Research Question 3

The third research question asked *to what extent Newman University maintains inter-organizational relations with its community and philanthropic organizations*. The finding demonstrated that low levels of inter-organizational relations with its community and philanthropic organizations were contributing to problems obtaining resources. Five subthemes developed the theme: enhancing philanthropy, donor cultivation, fundraising strategies, lack of inter-organizational cohesion, and cultivating student and alumni relationships. Developing stronger relationships within the community and the philanthropic environment is necessary to overcome the funding crisis in higher education (Kirshner, 2012; Powell & Rey, 2015).

Finding 3: Problems Obtaining Resources.

Subthemes for finding three are presented in frequency **Table 5**.

Table 5. *Themes and Subthemes for Finding Three*

Theme/Subtheme	*n*	%
Problems obtaining resources		
Enhancing Philanthropy	15	100
Donor cultivation	7	46.7
Fundraising strategies	9	60.0
Lack of inter-organizational cohesion	10	67.0
Cultivating student and alumni relationships	13	87.0

Subtheme 1 of finding 3: Enhancing philanthropy (15 out of 15). Philanthropic giving is a pillar of fundraising. All 15 of the 15 individuals interviewed for the research discussed means of philanthropy that could be developed to boost revenue for Newman. Newman is currently engaging with philanthropic sources, yet these networks should be strengthened, and new sources explored. Several respondents indicated a need for improving community connections and networking, as reflecting in comments like, "We have don't have the connections" (Maia), "I don't really go out and do anything and make contact…we should target who we spend time with" (Alex), and "I need to be at more social places with more people" (Julia). Others noted the importance of strengthening established relationships. Anthony shared how athletics networks: "We work with a lot of people in the community and places, kind of on trade outs, basically. And so, like at the YMCA down south. Football will go and run their camps, and then they allow us to use their facility." Those mutually beneficial relationships might attract positive publicity and philanthropic donors in the future.

Subtheme 2 of finding 3: Donor cultivation (7 out of 15). Seven out of the 15 respondents highlighted donor cultivation as an area of improvement. Within that domain, interviewees noted a problematic dependence on a donor list they referred to as an 800 or 900 list, which was a list

the Advancement Department created of individuals and organization to target for funding. Alex described how it works: "That's where our 900 list came from our annual giving list. We selected 900 people who had the high ability to give, even if they've only given $50 or $25, they have the ability to give a lot more." That strategy seemed ineffective to Lisa, who mentioned how employees were instructed to "look at the 900 list, so they're supposed to get back to me with any connections they have on the list," which had not proven effective. Julia said she aspired to recruit "20 of my 800 list to come to a function." Kyle also disapproved of the donor list technique, stating, "I just disagree with it. I was given a list and said, 'Here's your top 40, here's my top 50.' It's the same people that we have been going to; it's the same." Kyle worried about over-relying on the same donors: "It seems like every time we need money, we're treating them like ATMs." He insinuated the donors might perceive the relationship as one-sided or abusive. Instead, she suggested expanding donor recruitment:

> I would also like to mail to different people. But leadership likes to give us the lists. We need to broaden it. I know it costs money for donor cultivation pieces, but we could try to send it to a new batch of donors. You know, you may lose some money, because you're spending more money on postage and printing and sending it to people that haven't given in three or four years.

Maia, who helped develop the donor list, described the redundancy of the current donor list strategy as, "kind of like shooting fish in a barrel." Since the donor list focused on particularly wealthy donors, Julia believed that limited the pool of philanthropic donors: "At our benefactor's banquet, we had 65 of our donors. The only ones that were sent an invitation had donated over $1,000 this fiscal year. So that really eliminates quite a few of our donors."

Subtheme 3 of finding 3: Fundraising strategies (9 out of 15). In terms of specific fundraising strategies, the Advancement Department had limited success with major donors and major gifts. Maia explained, "We have a handful of major donors." However, one of these donors, "Gave three million originally and then they gave us another million." She expanded, saying, "We raise major gifts for the two schools and for our Nurse Anesthesia program, which we execute targeted mini campaigns to achieve our annual fund goal. We also raise money for endowment." As for endowed scholarships, Maia said, "Right now we will cover at least five students that are receiving $1,000 each." Lawrence recalled one major gift donor had lunch on campus and, "presented a check for $150,000, for their endowed scholarship. They had been giving $1,000 here and $1,000 there and it was only $26,000 to start, but now it's $177,000." He also mentioned, "We would like to ask for 2 million endowed professorships over several years." Arthur recalled another individual who'd made major donations over the years: "Over the course of eight years he's given us like half a million or something crazy." Lisa also noted that the Advancement Department solicited large funding, saying, the staff members, "Work hard on getting major gifts."

The school also focused on events. Arthur said, "There's a lot of events. Every year, I would say internally, you know, we're in the 200 to 300 range. If we're counting meetings, big events, on campus events, I would say there's like 60 to 70." Party on the plaza was another lucrative occasion. According to Julia, "We had party on the plaza, which is a big donation thing, and then we had our benefactors' banquet, so we raised a lot of money just doing that." Kyle shared, "As far as an annual campaign, the only time we really solicit businesses is for party on the plaza. That's our annual fundraiser we do for student scholarships, and that's when we're out asking for support from businesses. As for foundations, now we don't have a grant writer."

Giving Tuesday was another successful event. According to Julia, Giving Tuesday "Ended up raising $13,935." Wendy added, "With Giving Tuesday we ended up with a couple big donations. For this one we want to do tons of small donations."

In an Advancement Department staff meeting, Kyle stated, "We just have our Newman Fund, which is our annual fund." Four people mentioned luncheons as a fundraising strategy. For instance, Maia explained, "We have friends of Newman in the community that have scholarship luncheons to raise funds for Newman." The Christmas mailer was another focus, mentioned by three individuals, that focused on planned giving. For example, Kyle supported the Christmas mailer because it reached, "Women in their 60s and early 70s. They've given consistently but not big gifts consistently."

The Advancement Department occasionally targets corporations as well. Maia said, "We are targeting corporations, you know, a thousand here, a thousand there." Maia suggested that corporations were no longer as profitable as in the past: "I will tell you, the days of philanthropy for corporations is gone. And they want a return on investment. So mainly corporations would be partnerships. And that's a little bit out of our area." She stated that the partnerships don't provide as much of a benefit as philanthropy. Maia did mention corporate sponsors, though. "For an event called Difference Makers, so far, they are Enterprise Bank, Spirit Aerospace, the Nonprofit Chamber, and Eagle." She also mentioned foundations: "We do target foundations. Products do a better job of it." Richard believed corporations were still actively contributing, saying, "I think it was Koch that gave out over 900 grants." Arthur added, "Pepsi is one of our big sponsors." When asked about corporations, Leslie added, "our Amazon charitable gifts from smile at Amazon." Francesca considered targeting corporations as well.

Additionally, respondents noted an effort to target the Catholic community because it aligned with the University's mission. For instance, Wendy said that some of her work included, "the nuts and bolts about the university from a catholic perspective." On other projects, Wendy's department, "Created some print assets that the Advancement Department used that were geared towards the Catholic audience." This included, "Some things for the school of Catholic Studies, so they can piggyback if they're fundraising with Catholic donors." Maia also mentioned the Catholic focus: "We're trying to endow the School of Catholic Studies. Ours has been with a donor for scholarships. He's very Catholic. So, the Catholic Studies have been the most important to him. His dad supported that. That's what we're trying to pitch to him."

Subtheme 4 of finding 3: Lack of inter-organizational cohesion (10 out of 15). A lack of inter-organizational cohesion also limited Newman's potential. This finding was developed based on 10 out of 15 participant interviews. There were no subthemes for the finding. While it appeared that staff members worked with diverse communities across campus, these relationships were often volatile. Some of the trouble involved consistency in communications and Advancement. Other issues concerned supervisors' failure to disseminate pertinent information to employees, which curtailed operations.

For instance, Wendy, who worked in marketing and promotions at the university, thought there wasn't a "consistent message throughout all elements of the university." She noticed that there wasn't much exchange with the Advancement department. She said that some of the content is used "mainly for the admission's team but we haven't used it in a very intentional way on the Advancement side." The Advancement Department was likely missing an opportunity for a dynamic collaboration because there were many strong staff members in the school's marketing department. Wendy described the work structure: "We act as an agency

model. The Advancement Department is one of our clients and the Admissions Department is one of our clients. We address the university as a whole from a brand standpoint." That seemed to be a large undertaking for one department.

Leslie saw limitations from within the Advancement Department as well, which she attributed to differences in campus perspectives and an unwillingness to share insights. She noted:

> Being short staff, you have to collaborate more. In academics, I feel there's so much disconnect. They see everything firsthand like what the students are doing and how the money we're raising is being utilized. Even when I was in admissions trying to sell this to high schoolers, I couldn't get academics and faculty members to share stories with me.

Communication barriers disappointed Leslie because all departments could benefit from the wealth of knowledge within the university as a whole. She explained, "There's just so much knowledge in this university. I just wish we could pick people's brains more and then be open to our department." She suggested that staff and faculty were reluctant to collaborate because they assumed the Advancement Department was only after their donations: "Any time we want to talk to faculty and staff, they think we're going to ask for money." Kyle supported Leslie's claim that the university could improve by sharing more information. He commented, "There are a lot of things that I'm not even really privy to. I'm not even really privy to some of the endowment gifts going to the Newman fund. I'm not exactly sure where it's going to."

Newman staff found it difficult to collaborate on projects that involved multiple departments, especially if they involved individuals representing different levels of administrative power within the university. That perspective was captured in a meeting about a new student success program. Richard and Lisa shared their frustration that different

administrative entities were delaying the program's launch. Richard lamented, "They haven't been working as a cohesive group: board, cabinets, top leadership." When pressed to explain further, Richard clarified:

> I think they view the program more as an obstacle than as a benefit, whereas our view is that this would provide students with some sort of benefit. So, my take on it is we're never going to get this done. This has been faculty driven, which has been a huge plus, but we were concerned about not having the vision from leadership down as well. And we're starting to see the problems with that now.

Richard was not alone. Lisa was also struggling with the lack of cooperation to get the program up and running. She thought it was a shame that administrative divisiveness was preventing students from receiving much needed support through the new program. She commented that not everyone was on the same page. Newman struggled to implement new innovation that would assist students and enhance the school's brand. There were also divisions within the student population that limited campus morale and student engagement. Pronounced barriers remained between student athletes and commuters, making event planning difficult for the Advancement Department. As a result, Newman had low student turnout for events. Arthur described the situation:

> We are in an interesting scenario where if you live on campus, you're probably a member of an athletic team. If you don't live on campus, you're probably not coming to an event. If you're a commuter, you're not coming to events. I guess it's like anything; it's hard to get people to get off their couch and come to something on campus.

The athletics department was generally seen as distanced from the rest of the university. To be clear, that arrangement had changed since a new head of the athletics department arrived.

However, at the time of the research, tensions remained palpable. Madeline perceived this division in her work as well:

> What I'd like to see more of is work between our departments. This fall we had the sports reunion, which was nice for all the athletic people to come back and get to mingle with the other sports people on campus, but something I would like to see is the music department mingling with the sports department. Like having little joint things and not just having it for sports or just a music event.

Newman's pronounced factionalism hindered its ability to provide support to current students and obstructed the Advancement Department's ability to accomplish their fundraising goals. These divisions crosscut all departments but were most evident between athletics and the Advancement Department as well as among students and alumni. These findings signal the school's inability to act on a systems level where subunits and subsystems successfully navigate the internal and external environment (Birnbaum, 1988).

Subtheme 5 of finding 3: Cultivating student and alumni relationships (13 out of 15).

Newman's struggle to cultivate student and alumni relationships was the focus of subtheme 5. Thirteen out of 15 respondents mentioned this conundrum in their interview. As mentioned previously, the university failed to build meaningful social networks between students and alumni. The disconnect was captured in comments like, "We just don't get a lot of alumni back. When we see 20 people, we think that's good…we've lost interest in our alumni donors. We're trying to get them back" (Julia). Anthony stated, "We have not done a very good job of seeing what else is out there and utilizing our resources and hitting our alumni or athletic alumni. And so that's been a big bone of contention for me." Younger alumni were most reluctant to give

back. Madeline noticed, "Our younger alum, they're not fully ready to give back a ton." She suggested alumni sought more transparency about how their donations were positively impacting the school. She stated, "What I heard was that they would like to know where their money is going." She encouraged the school to share specifics with alumni. Instead of saying donations went to scholarships, she suggested the school reveal which students were sponsored and provide details about their progress. Additionally, alumni might be persuaded to offer more if they knew their money was going towards something that they could participate in. For instance, Madeline suggested Newman could tell alumni their money would, "Help build the set for our new show coming up, you know, please come see it, enjoy it, mingle beforehand." Francesca thought the problem didn't necessarily hinge on ineffective communication. In her case, she didn't attend events because she was overwhelmed with educational and professional obligations: "They make it sound very interesting and very fun. I'd love to come and connect with the other alumni and students for happy hour. I'm just busy with work and school."

Another hurdle was making alumni feel like they belonged in alumni events. Madeline shared:

> I hear from our alumni that have graduated recently, 'Oh cool event, but I don't feel like I can go because I wasn't in a sport' and things like that. I have a friend who married a baseball player here and she was telling me 'Well, we went to that event, but I didn't really feel like I fit in because I didn't do sports on campus. I did music or education, so I really didn't feel like I have many people to mingle with.

Interviewees mentioned that because Newman hadn't worked to foster strong student and alumni relationships, the school's fundraising practices were perceived as invasive. For that reason, the Alumni Board hesitated to ask for donations, said Madeline. Kyle explained, "The

Alumni Board doesn't think we should ask at events. They think that at alumni events, people should just feel free to come and there should be no asks." Julia echoed that point: "I think it's once they graduate. It's whenever they're contacted, they expect we're asking for money, like 'can you give a donation'?"

Interview data demonstrated that alumni fundraising strategies generally missed the mark. Those working in alumni relations used the 800 list of donor prospects, referred to in subtheme 1 of finding 2, and targeted those people for lunches and donor stewardship activities like home visits and gift drop-offs. When asked to explain Newman's current strategy to cultivate alumni relationships, Kyle responded, "Just eating lunch with different old athletes." Julia elaborated on her tasks: "I make calls to alumni trying to get their perspectives on how we can engage with alumni more." Julia described her activities as "targeting analytics." She stated, "It's targeting analytics. I would go and I would have my list. And I will drop off a mug and a letter of appreciation to them, put my card in there, asking if you have any questions, I'll be in touch with you." However, she said only 2 to 3 people out of 8 (25-37.5%) would open the door to engage with her. The project lacked clear organization because they knocked on people's doors during work hours. Madeline, who worked in the alumni office, said she, "Makes calls to a lot of these older folks who are probably like in their 80s now and come to a lot of our events."

Richard pointed out other weaknesses in alumni outreach strategies. He said, although his old college fraternity had no trouble finding him, Newman alumni relations could not locate his sons, who were Newman alumni. He shared that Newman, "Still doesn't know where my sons are, and I told them. I've given them addresses. I still get the updates and they don't get anything." On the other hand, Wendy thought her efforts in marketing were successful, stating, "Our storytelling does help. I think we could use storytelling to attract potential donors more

effectively. Our alumni see it." Fundraising is believed to be both an art and a science (Drezner, 2010; Lindahl, 2011). Higher education fundraising professionals often look to the art of storytelling to draw donors to support their institutions. This storytelling often takes the form of student profiles and personal accounts to bring the prospective donors and the students closer together. This concept, often employed in traditional mail and e-mail solicitations, becomes integral to an identity-based approach to fundraising (Drezner, 2018b, p. 264).

Disconnect with alumni was surprising given the school's wide array of alumni activities. Maia described the Advancement Department's overall alumni engagement strategy: "Our strategy to help get the alumni involved hosting a variety of events, reach out beyond the Wichita community, communicate better to our alumni members about events." Maia also noted the department's aim to reach out to alumni in other cities in the region. This would allow the department to tap new revenue streams and potential marketing opportunities within alumni companies. This was an exciting prospect for the department, given its need to reach beyond Wichita.

Research Question 4

Research question 4 asked *how Newman could diversify its fundraising efforts for greater impact.* The finding was generated based on the theme environmental constraints. The subthemes included reassess outreach and communication strategies, support students and alumni, and focus on Newman's unique identity. The RDT literature states that organizations should think strategically about environmental constraints and adapt their product accordingly. This process must necessarily include identifying and addressing the needs of the marketplace (Pfeffer & Salancik, 2003; Powell & Rey, 2015).

Finding 4: Environmental Constraints.

Subthemes for finding four are presented in frequency **Table *6***.

Table 6. *Themes and Subthemes for Finding Four*

Theme/Subtheme	*n*	%
Environmental Constraints		
Reassess outreach and communications strategies	6	40.0
Support Students and Alumni	9	60.0
Focus of Newman's unique identity	12	80.0

Subtheme 1 of finding 4: Reassess outreach and communication strategies (6 out of 15).

Six out of 15 Newman employees signaled the need to reassess and possibly build on the

university's outreach and communications strategies, such as social media. Investing in social

media and online campaigns would allow Newman to align with research-driven aims to access

younger and previously untapped audiences (Osili, 2019). Outreach strategies included social

media, the university website, CRM, and professional networking apps. For instance, Wendy

shared, "We are redoing LinkedIn, we just don't have as much engagement as Facebook and

some of the others. We probably post four or five times a week." She also indicated that

Newman had, "We have a blog page on the Newman website that we're working on but it's

mainly for recruiting. We don't really have anything for Advancement Department on that." She

considered the school's website, Newmanu.edu, a vehicle for donor giving: "We have net

communities, so people can go to Give.newmanu.edu." According to Wendy, Newman also had

promising mobile apps like "bidpal.net, which is a mobile bidding site." She indicated the team

should move away from Raiser's Edge as their CRM system, insisting, "We have the very basic

version of Raiser's Edge, so there's a lot of stuff that we still are missing. Raiser's Edge is one of

the oldest among industry standards…and it's not meant to be a CRM." Leslie also mentioned

Newman's net community giving tools: "People can give a gift to Give.Newmanu.edu."

Madeline described some problems with the school's social media strategy, stating, "We have an alumni page on Facebook, which is where a lot of our alumni can look. But how are we going to get that information out if they don't have a Facebook?" Her comment may indicate a generational difference in social media platforms, as younger generations turn away from Facebook. Julia held a more positive view of the school's social media fundraising success. On a recent Giving Tuesday campaign, "We didn't know really what to expect so we just focused on social media. And we reached the goal. So that was one of the best ways to do it," Julia shared. Lastly, Anthony and Alex were excited about the new Booster Club app, which they hoped would draw more alumni attraction. These initiatives demonstrate that the university is already turning towards investments, instead of "save the day gifts" (Powell & Rey, 2015 p. 96)

Subtheme 2 of finding 4: Support students and alumni (9 out of 15). The subtheme support students and alumni arose again in relation to finding 4. Nine out of 15 respondents suggested forging stronger relationships with students and alumni, particularly related to professional engagements and socializing. Interviewee's strong support for diversifying fundraising through aiding students and alumni were evidenced in interview replies such as, "This probably leads back to the student experience. How do we connect with the opportunity to give back once you have received an amazing education" (Lisa) and "We can innovate with anything related to alumni" (Leslie).

Respondents believed Newman needed more professional networking opportunities and social events. These opportunities for interpersonal exchange would allow attendees to establish friendships and business partnerships down the road. For example, Julia revealed:

When our alumni reach out it's because they want to have social hours.

I mean that's what people really want, networking events. We have an alumni lounge. Every time we have an event there everybody's like, 'Wow, that's really nice in there.' They really enjoyed it. But we don't have that many things like that.

Supporting alumni and student socialization was also a priority for Madeline. She reported that although alumni know about Newman's widely publicized alumni events, "They don't know about more informal gatherings like a get together down at Ziggy's. I think they would be more interested in giving back if we did events with students." She said the marketing materials should be clearer to attract alumni as well. Madeline also suggested an Ambassador Program, which she described as, "A program where we have alumnus willing and able to donate their time to help a student here on campus with mentoring advice and professional connections." She explained the Ambassador Program might, "Give me more insight on degree-appropriate jobs after I graduate because right now, I'm trying to figure that out and it's hectic." Clearly, students craved more support.

Staff believed the navigator program was an ideal way to support students, helping them stay on track at school, and ushering them to better career options. Richard explained, "Every student will get hands on learning and they will be supported by a dedicated advisor." The navigator program is built off Newman's own research finding that students need a stronger relationship with faculty, administration, and mentors. "We found they want face to face relationships with our faculty and peers." Navigator responds to students' wishes because, "That's the language that the students used in our surveys to them. They kept saying, 'I need help navigating college'." He continued, "I want other schools to look at the students who are getting this experience and just say, 'Oh, I wish my students could have that experience.' We will make it so great that they'll just want to be a part of it."

There was also interest in reaching out to alumni to support a matching gift program through their place of employment. For example, Anthony stated, "I just found out last week that Textron here in town has a matching program…We have a lot of athletic alumni at Textron. We're going to hit that hard." Francesca believed reaching out to a local corporation for matching gifts donations was a powerful suggestion. She wanted to cultivate the relationship with Textron's alumni with a matching gifts program because, "We want to talk about how we can support the university that created opportunities for us."

Subtheme 3 of finding 4: Focus on Newman's unique identity (12 out of 15). Twelve out of the 15 respondents contributed to subtheme 3 of finding 4. This subtheme resonates with previous scholarship arguing for the ability of identity-based fundraising to create a sense of a collective (Drezner 2018; Flippen, Hornstein, Siegal, & Weitzman, 1996). The subtheme also draws on the theory that people feel empathy for those closest to them (Drezner 2018: Small, 2011). Within this subtheme, 10 out of the 15 respondents suggested that Newman manage its family friendly, community orientation. These individuals prioritized strengthening Newman's tight-knit feel as a means to establish new funding potential. That interconnected sensation was what attracted Madeline to attend the university. She remembered how those personal relationships drew her into the community on her first school visit:

> One thing I found about Newman was that it was a very good community. I came over Christmas break so there really wasn't anybody here. Georgia took time out of her vacation just to come give me a tour, so I was like, 'Wow, if they cared that much to come give me a tour, what are they going to do for my career, my classes, and my education?

One student's personal sacrifice was enough to secure Madeline's commitment to the school. Newman's individualized experiences made the school unique. With only 3,205 students, the university provided a boutique educational experience in which students and their peers could establish meaningful relationships. Those ties would draw students to donate in future alumni giving campaigns.

The students and alumni interviewed for the study emphasized their positive experiences at Newman, which were rooted in the family-oriented connection they felt. Julia proudly described her history welcoming out-of-state students to her local family home during the holidays. She remembered that during holidays like Thanksgiving, "Most of us would ask out-of-state guys to just come with our families, but I don't know if that's being pushed these days." She recalled her days at Newman as transformative, saying, "It was a family." Those bonds pushed Julia and others to work towards an alumni family day.

Madeline raised an innovative idea to attract more alumni families to Newman's events while benefitting current students. She said, "A lot of our alum have children, so alumni parents need someone to watch their kids to be able to enjoy their visit without parenting responsibilities." Madeline indicated a mutually beneficial exchange between students and alumni. Francesca a former international student and Newman alumnus, also believed in focusing on the community, especially international students, who might feel isolated from home. She believed faculty and staff could contribute to Newman's family and community-oriented atmosphere. "I'm more attached to Newman because the sense of community and family.

From a strategic standpoint, however, respondents suggested conducting further research on whether international students would contribute finances to Newman. One participant

proposed, "We should see if international students are going to stick around here." She advocated that folding international students into Newman's community fabric. Doing so would potentially open a new fundraising pipeline from alumni living abroad. Others named international students as an untapped resource as well. Julia said, "I know we have a lot of international students so I'm not sure exactly what happens," referring to whether they could potentially be a fundraising source. Moreover, Liam mentioned:

> Obviously, you want as many kids as you can from as many different backgrounds and different areas. We recruit athletically from everywhere around the globe. And yeah, I heard once on the Men's Soccer Team, that there were 12 different nationalities and that's awesome but how are we going to grow that relationship?

Within the focus on Newman's unique identity, six out of the 15 participants suggested turning to the school's Catholic identity and collaborating with the local Catholic community. For instance, Kyle noticed, "Last year I did a mail appeal that focused on Catholic identity and it raised, $26,000, which was the most in Newman's history." Alex had a similar comment, stating, "The Catholic community here is super generous. Over half the social organizations in the city are Catholic." The statistic seemed high, given that "Only about 12% of the population" is Catholic. Maia also noted the Catholic community's generosity and fundraising prowess. She recalled one individual from the Catholic Church who garnered, "Over $100,000 in collections a week," which dwarfed the amount of collections raised in the parish, which amounted to, "maybe $40,000."

Richard mentioned, "Part of our Catholic identity is understanding the world beyond yourself, so we want students to see that one way to do that is through service for others." Francesca said that the nuns contributed to Newman's Catholic spirit, saying, "Newman is

somewhat timeless. In a sense, it has to do with the mercy and the patience of the nuns. They're so passionate about stuff. They have courage." Turning inward to those values might serve Newman's fundraising efforts. Arthur explained that Wichita's Catholic community was tight-knit: "We're a decent sized town, especially when it comes to the Catholic community. We're all interconnected." In the context of that solid local Catholic community, Arthur mentioned, "Leslie and I both grew up here so we have a lot of connections that hopefully will help us." Maia mentioned fundraisers' preference for the Catholic identity over student-related fundraising content:

> We found that appeal towards our Catholic identity is a lot more effective than student stories. For some reason, we used to do student stories without much success. And when we had more of our Catholic identity, we seem to get a lot better response. It's counterintuitive.

> While several findings indicated the need to engage and support students and alumni, it was important to not lose sight of what makes Newman unique. Newman's mission to serve the Catholic community and live in the spirit of critical consciousness should drive fundraising activities. Respondents noted the Catholic community's resources and generosity and argued persuasively that the school's Catholic identity be a pillar of the school's operations. Reassessing the school's religiously situated values and identity should be a central fundraising strategy.

DISCUSSION

The data collected from Newman University staff, board, students, volunteers, and alumni indicated key areas of improvement to achieve the school's ability to procure philanthropic resources during a time of economic austerity in US higher education. Following RDT, the study targeted data on Newman's organizational effectiveness, environment,

problems in obtaining resources, and the contingencies and constraints derived from the environment (Powell & Rey 2015, p. 96). Interview data found that the university lacked strategic planning, student and alumni engagement, data management, inter-organizational and campus cohesion, and successful donor cultivation strategies. The results of the study will be discussed, and the project's limitations identified. The discussion is organized according to the study's research questions and key findings.

The first research question asked: *What are the contributing factors that are influencing the low level of philanthropic giving to Newman University?* The study found that weaknesses in organizational effectiveness (finding 1) limited the level of philanthropic giving. The finding attends to the organizational effectiveness component of RDT (Pfeffer & Salancik, 1978, 2003; Powell & Rey, 2015). RDT hinges on an organization's ability to successfully organize itself to establish effective outcomes. By and large, the university suffered from a lack of cohesion across campus and fragmentation among and within departments. For example, staff failed to disseminate relevant information and data, which hindered operational activities. Staff lacked adequate training for their responsibilities, and some never received a job description, which caused confusion when completing tasks. They suggested that strategic planning should include efforts to restore the university's image and hire competent staff to accomplish goals. Moreover, Newman's job retention was so low that there were vacancies in critical roles like a grant writer, an essential component of harnessing funding for the institution. This finding aligns with literature suggesting that higher education employers increasingly have trouble finding qualified applicants (Gonzalez, 2011). To compensate for high turnover rates and employment instability, staff assumed more responsibilities, often beyond their job descriptions. Staff felt overworked and underpaid,

which deflated worker morale, and exacerbated interpersonal and inter-departmental conflicts. The study also revealed that staff had little guidance or direction in the workplace. They were left guessing how to complete tasks.

Data mismanagement also beset philanthropic giving. Research participants were dissatisfied with the university's data management software, Raiser's Edge, which often duplicated or erased important data on philanthropic gifts. Respondents also remarked that Raiser's Edge housed inaccurate donor data. Another critique was that the program did not provide proper donor stewardship activities, such as thank you notes and letters recognizing their financial contributions. Employees assumed that upgrading the system was unlikely given the university's budget cuts. Finally, the Advancement Department had no protocol for tracking donor checks, so checks disappeared before being deposited. Essentially, when the department was successful in procuring scarce funding, those efforts went unrewarded because of organizational negligence. According to Pfeffer & Salancik (1978, 2003), "a goal-oriented perspective considers organizations a "collection of individual efforts that come together to achieve something unobtainable by individual effort alone (Pfeffer & Salancik 1978, 2003). The collective individual efforts restricting organizational effectiveness made fundraising goals out of reach.

Additionally, alumni were reluctant to partake in philanthropic giving. Alumni are a key source of philanthropic support for higher education (Drezner 2008, 2009, 2011, 2013; Drezner & Huehls, 2014). Low levels of alumni economic contributions hindered fundraising success. Alumni were hesitant to give back to the school because they believed tuition was already high. They seldom attended events and exhibited poor school morale. Alumni felt little rapport with those conducting alumni relations and felt no moral responsibility to give back.

As products of the university, they impacted the school by not engaging as donors or marketers for the institution (Birnbaum, 1988).

RQ2 asked, *What role should Newman's leadership play to maximize successful fundraising outcomes?* The analysis demonstrated the importance of managing the Advancement Department's environmental impact (Pfeffer & Salancik, 1978, 2003; Powell & Rey 2015). Research respondents noted that leadership should set strategic goals so the Advancement Department could devise a clear roadmap. Findings also pinpointed the need to cultivate student and alumni engagement. Students commonly complained that they didn't feel supported by faculty and administrators. This diminished their experience as environmental "inputs" interacting with individuals and administrators on campus before graduating as environmental "outputs" with donation potential (Birnbaum, 1988). Respondents brainstormed ways to establish meaningful relationships with students from the time they stepped foot on campus so that they would feel a "bond to alma mater" (Drezner 2008, 2009, 2011, 2013a), thereby strengthening Newman's organizational identity while still enrolled (Drezner & Huehls, 2014). However, students and alumni interviewed for the project spoke of their own experiences at Newman with affection, highlighting small class sizes, warm community, and family feel. It seems the students and alumni interviewed for the study would be ideal individuals to strategize a plan to disseminate that feeling of connectivity to students and alumni that felt apathetic towards the school.

RQ3 solicited data on the *extent that Newman University maintains inter-organizational relations with its community and philanthropic organizations.* The finding related to problems obtaining resources, established in RDT (Pfeffer & Salanick, 1978, 2003; Powell & Rey, 2015). Scholars suggest that leaders of higher education must establish mutually beneficial relationships

with philanthropic organizations, external groups, and community supporters to build a funding

stream (Alphin Jr., Lavine, Stark, & Hocker, 2016b). It was essential to forge stronger

relationships of interdependence to resolve funding problems.

Respondents noted numerous lucrative corporations in Wichita with matching gift

programs that might fulfill that objective. Overall, the study found that the university's

philanthropic engagement needed enhancement. There was limited engagement with

foundations, which have traditionally been one of the strongest philanthropic donors to higher

education (Thelin & Trollinger, 2014). Respondents believed the Advancement Department

should implement a more aggressive outreach campaign to cultivate donations from

corporations, foundations, and major donors. They suggested stepping away from their

dependence on the "800 list" of donors. They insisted the list limited the pool of potential

donors. Existing partnerships with Catholic communities in Wichita were described as some of

the most reliable funding streams. That finding supports work on religious identity and

philanthropy to higher education institutions (Gasman, Drezner, Epstein, Freeman, & Avery,

2011) and the need to acquire resources from community supporters (Alphin Jr., Stark, & Hocker

2016b). The Advancement Department also failed to tap into lucrative Athletic Department

revenue due to disparate funding strategies and interpersonal rivalries, which were being

addressed with new athletic department leadership and the departure of the Advancement

Department's Vice President. Finally, the department missed out on alumni donations because of

its inability to cultivate meaningful relationships and bond to alma mater (Drezner 2008, 2009,

2011, 2013a).

RQ4 sought to answer *How can Newman University diversify its fundraising efforts for*

greater impact? Research finding 4 overlapped with the environmental constraints element of

RDT. The finding included the subthemes reassess outreach and communication strategies, support students and alumni, and focus on Newman's unique identity. RDT suggests that organizations compare environmental constraints with organizational particularities and the characteristics of the marketplace (Pfeffer & Salancik, 1978, 2003; Powell & Rey, 2015). In other words, it is crucial for universities to assess their environment to determine how to successfully navigate the competitive landscape (Wilson, 2011).

The study found that while Newman had a website, social media, and professional networking services in place, these communications efforts were largely ineffective in attracting donations and community engagement. Participants suggested thinking more strategically about which online platforms would secure interest in the school. One student mentioned Facebook was not an ideal tool for engaging with younger generations, for instance. These findings support Osili's (2019) claim that universities should invest in online campaigns and new technological vehicles to reach a larger audience and appeal to younger generations. In doing so, the school could attract a broader pool of potential funders and tap into a new funding trend in which funders invest in "creating tomorrow" opportunities linked to technology over antiquated "save the day" gifts (Powell & Rey, 2015 p. 96).

Once more, the research demonstrated students and alumni wanted more support. Respondents reiterated that there was low engagement among alumni. One interviewee noted that young children prevented alumni from attending evening events. Perhaps with a babysitting program in place, alumni who were parents could enjoy events free of parental duties. Providing those services would likely increase private giving from parents and grandparents (Proper & Caboni, 2014). It was also suggested that the school be more transparent about the alumni communications so that alumni could make informed decision about whether to attend.

Moreover, respondents thought the school should be more deliberate about informing alumni exactly where their financial contributions went. They also believed it would be ideal to allow alumni to benefit from their donation. For instance, if an alumnus offered donations to improve the school's theater, the school should invite the donor to see a play. Alumni estrangement and unclear outreach strategies hurt the school's fundraising basis because communications and alumni relations are key vehicles to generate philanthropic giving (McAlexander, Koenig, & Dufault, 2014).

Respondents revealed that alumni craved social outings and professional networking opportunities. Additionally, research participants searched for innovative ways to support current students so they would have positive experiences and be guided towards successful careers. Among the suggestions was an Ambassador Program, through which alumni mentored current students on career advice and helped them establish a plan to achieve their professional goals. Research participants were also excited about the school's new Navigator program, with the slogan, "your Newman GPS (Guide to Personal Success)." Navigator would offer students a personalized career path based on leadership development and hands-on learning, while being assisted by a dedicated support team.

Newman's unique identity as a private, Catholic liberal arts college with large international and student athlete populations has the potential to tap into new funding sources. Drezner (2018) indicates identity-based fundraising as an emerging strategy in philanthropy (Drezner & Huehls, 2014, 2018). Literature suggests three reasons why identity impacts philanthropy. First, shared identity cultivates a sense of a collective (Flippen, Hornstein, Siegal, & Weitzman, 1996). Second, interdependence drives prosocial behaviors (Penner, Dovidio, Piliavin, & Schroeder, 2005). Third, shared social identity develops sympathy (Drezner, 2018a,

p. 262). Respondents revealed that Newman had the foundation to draw on social identity because it offered a family-like atmosphere. Respondents believed faculty and staff could enhance that aspect by inviting students into their homes for shared meals and developing personal relationships.

Findings suggest the school's international student population should be invited into the core of Newman's collective identity and support to international students should extend beyond graduation. This finding aligns with literature stressing the importance of identity within higher education philanthropy along the lines of race and ethnicity (e.g., Cabrales, 2013; Gasman & Anderson-Thompkins, 2003; Tsunoda, 2013). The study also found that fundraising activities should tap into the school's Catholic identity. Religion is a core social identity that garners philanthropic giving to high education institutions (e.g., Gasman, Drezner, Epstein, Freeman, & Avery, 2011). Research participants highlighted the importance of the school's Catholic faith and guiding principles, such as Newman's mission to "draw nourishment from its relationships with surrounding Catholic communities and dioceses" (Newmanu.edu). Research participants noted marked generosity of the local Catholic community, which formed an ideal pool of donors.

LIMITATIONS

While the qualitative study produced rich data and recommendations to improve Newman University's fundraising potential, there were limitations. First, only 15 staff, students, alumni, board and volunteers were interviewed for the project. A larger number of participants would elicit more data. Second, all participants interviewed were white. Future studies should consider targeting a more ethnically and internationally diverse sample to determine whether the findings reflect Newman students, volunteers, alumni and staff of different social backgrounds. A third limitation was the fact that respondents answered

questions pertaining to their place of employment while on the job site. For this reason, they may have withheld information that could appear to critique the university, out of fear that disclosing that material might compromise their employment. Fourth, because the staff maintained busy schedules, respondents may have abbreviated their interview narratives to resume work responsibilities. Fifth, the research initially sought to perform a thorough review of university surveys, fundraising strategy documents and protocols, but that component was reduced significantly due to the university's dearth of historical records.
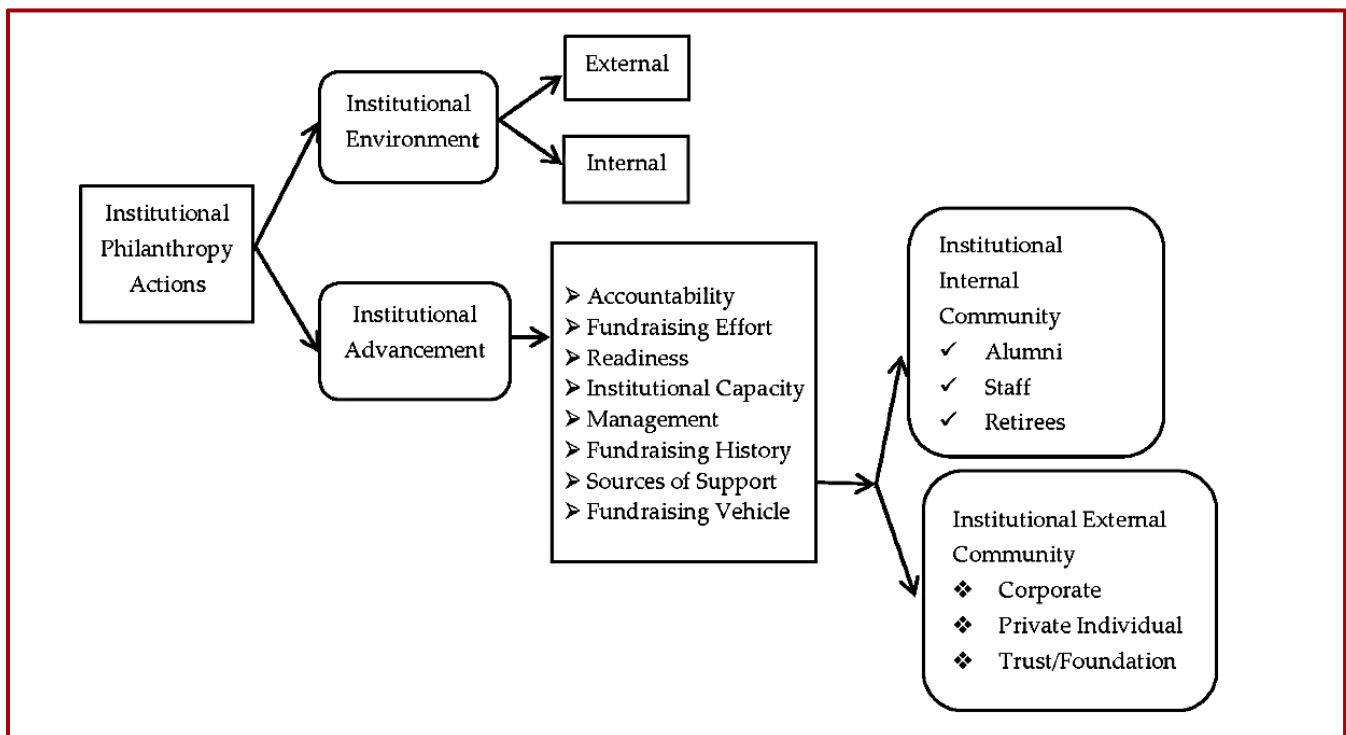
RECOMMENDATIONS

In consideration of the study's findings, it is recommended that Newman University Advancement lead an integrated and collaborative effort with University Relations to develop, communicate and enhance Newman's image and reputation. The goal is to build and nurture relationships with constituents, and secure philanthropic investments that are fully aligned with Newman's mission, strategic goals, programs and students. Newman's Advancement Department must develop and cultivate relationships with students/parents, alumni, individual donors, foundations, corporations and the extended community.

Recommendation 1: Draft a strategic fundraising plan.

The Advancement Department was rudderless without a strategic fundraising plan. A successful strategic plan is essential in fundraising for higher education given the tendency of universities to focus on specific processes and not long-term considerations (Duderstadt & Womack, 2003). The strategic fundraising plan would ideally set high, yet achievable goals (Pfeffer & Salancik). The plan should identify diverse funding sources and define organizational

metrics. Planning must pinpoint environmental inputs and constraints in order to acquire

essential resources for capacity building (Pfeffer & Salancik, 1978, 2003; Powell & Rey 2015).

The plan should implement an RDT perspective (Pffeffer and Salancik 1978, 2003) to ask

fundamental questions such as: What competitive advantage do we have over approximately

similar institutions? What special role does our university play in the US's private higher

education network? Lastly, the plan should provide a practical blueprint, as displayed in Figure

4, to guide organizational activities.

Figure 4. *Framework of University Philanthropy Action (Rohayati et al., 2016)*

Recommendation 2: Implement organizational effectiveness.

Newman should continue to build its Advancement Department with attention to

clarifying roles and responsibilities, developing a team of competent staff, and designing

integrated infrastructure. Using the strategic fundraising plan, the department can reshape its organizational structure and communicate its purpose, goals, and administrative architecture. Doing so will illuminate employees' tasks and objectives to achieve established goals based on a changing market environment (Pfeffer & Salancik, 1978, 2003). Newman should invest in efforts to recruit and retain a diverse staff and provide professional development/training opportunities throughout all career stages (webinars, conferences, training). It is pertinent to hire an accomplished grant writer to research funding sources and solicit donations. It's recommended the administration adopt a highly collaborative approach that actively engages campus (deans, staff, departments, students) to execute shared goals. For instance, the Advancement Department can team with the marketing and athletics departments to share resources and media while organizing joint fundraising events for the school.

Recommendation 3: Prioritize data management.

It is recommended to overhaul Newman's data management. Newman should implement a rigid data management protocol outlining which employees handle donations and how. The school should upgrade its CRM system Raiser's Edge for grant management and donor cultivation. If funding for new software is unavailable, Newman must research ways to maximize Raiser's Edge's potential and address the software's technical glitches. The CRM system should execute donor stewardship functions and produce tax letters and thank you notes, followed up by personalized gestures to recognize donor contributions. Staff should prioritize the identification of lapsing donors and establish a reliable history of all funding transactions. Moreover, the university can evaluate its institutional data to determine programmatic effectiveness and make appropriate reductions and alterations (Fischer, 2011). For example,

studies suggest that if data indicates a large commuter population among the student body, such as at Newman, the university can modify its services and efforts by offering more online programs or hold virtual office hours (Powell & Rey, 2015a).

Recommendation 4: Enhance the philanthropic culture at Newman.

It is recommended that Newman University enhance its philanthropic culture. Newman should extend partnerships across campus to increase productivity and participation in philanthropy (President, Provost, Deans, Board, Alumni, and Students). Newman should increase major, annual, and first-time gifts by employing innovative fundraising strategies like mobile giving, matching gift programs, and identity-based giving. The university must procure external resources, particularly foundations and corporations, which is a market-driven and RDT-grounded tool to overcome universities' financial troubles (Thelin & Trollinger, 2014; Powell & Rey, 2015)

The study findings recommend increased outreach efforts in diverse communities to leverage new and existing partnership opportunities with the community, Chamber of Commerce and businesses, on local, regional, and global scales. As an institution that spans each of the aforementioned scales, the Catholic Church provides an ideal donor base, in addition to serving as a collective source on which to anchor the school's social and religious identity (Gasman, Drezner, Epstein, Freeman, & Avery, 2011). Fundraising efforts should also highlight the benefits to community and stress the point that giving to higher education improves local economic opportunity and strengthens America's civic and economic fabric (Thelin & Trollinger, 2014).

Recommendation 5: Cultivate student and alumni bond to alma mater.

Newman should broaden and deepen constituent engagement and develop meaningful relationships with alumni, students/parents, and community. These efforts should frame the school as a family-friendly and tight knit community. Alumni relations would benefit from a multi-pronged approach to established close, non-monetary relationships before asking for alumni donations. Doing so will increase alumni's receptivity to school outreach strategies. The school also should consider establishing an Ambassador Program in which alumni mentor students about career prospects, professional networking strategies, and help sharpen students' job documents. The generation of volunteer and internship opportunities for students and alumni achieves mutually beneficial goals (Schmidt, 2018).

It is recommended that Newman commence student engagement prior to their enrollment and continue strengthening the relationship during students' first months on campus to cement their bond to the school (Drezner & Huehls, 2014). The university should pursue identity-based fundraising to create a sense of a collective (Flippen, Hornstein, Siegal, & Weitzman, 1996; Drezner 2018) by cultivating empathy (Small, 2011; Drezner 2018). The school must engage particular social identity groups based on religion (e.g., Gasman, Drezner, Epstein, Freeman, & Avery, 2011), race and ethnicity, (e.g., Cabrales, 2013; Gasman & Anderson-Thompkins, 2003; Tsunoda, 2013), and consider targeting students populations of different abilities (e.g., Drezner, 2005), and sexualities (e.g., Drezner & Garvey, 2016; Garvey & Drezner, 2013) to increase empathy-led community giving. It is recommended that the Advancement Department collect data on the perspectives and interests of international students to assess their potential for alumni giving and to support them as valuable cultural resources on campus. In addition, Newman should focus on its large student/alumni athlete population and consider offering them free

tickets to certain sporting events as its longer-term donor cultivation strategy. The Booster Club should be another priority for growing alumni athlete interest in the university.

Recommendation 6: Revise communication strategy.

It is recommended that Newman raise awareness and increase advocacy for the University, leading to widespread recognition of the school's core values, teaching, learning and service excellence to improve adherence to Newman's brand identity and brand standards. The strategy should expand the targeted audience while using analytics to deliver the right messages to the right people. The communications plan should assess which online platforms engage certain demographics. For instance, respondents reported that younger generations are not active on Facebook. Given that finding, the study recommends that Newman incorporate social media used by a younger demographic. Staff should also determine engaging content and activities on social media like tagging friends in school photos, offering prizes for trivia questions, hosting celebrity live chats on Instagram, or choreographing friendly Tik Tok dance routines competitions. These strategies boost school spirit and socially market Newman's tight-knit community.

Media should draw on Newman's status as a private Catholic university that employs holistic learning to "empower graduates to transform society" (Newmanu.edu). Drawing on the research findings, it is recommended that the university consider designing spotlight stories on the school's nuns that underscore their dynamic personalities, bravery and commitment to social justice. Communications should also highlight Navigator as a framework to convey Newman's distinct value. Communications efforts should protect and promote Newman's reputation through a proactive approach to issues and increase the circulation and saturation of positive stories in regional and national media (damage control).

CONCLUSION

This transformational philanthropy project sought to understand areas to maximize Newman University Advancement Department's fundraising potential to offset its financial crisis. The main purpose was to expand philanthropic support to Newman University annually. The study conducted 15 interviews with staff, students, alumni, and volunteers to elicit qualitative data on fundraising activities and philanthropic insufficiencies. The research uncovered major deficiencies in organizational effectiveness, environmental impact, obtaining resources, and environmental constraints that centered on key areas like strategic planning, data management, philanthropic donor cultivation, student and alumni relations, communications, and identity-based fundraising and provided practical recommendations to resolve them.

Planning strategies and organizational effectiveness are key components of the recommendations. The Advancement Department needs precise objectives and structure should be established to provide clear roles, responsibilities, goals, and protocols. Developing and implementing comprehensive fundraising strategies, anchored to Newman's priorities, will increase its donor pipeline. The findings revealed dire need to update the school's CRM data management services for regimented tracking and enhanced donor stewardship.

New philanthropic sources should be attracted in accordance with changing environmental attributes, with particular attention to corporations and foundations, to diversify Newman's funding base (Pfeffer & Salancik, 1978, 2003; Powell & Rey 2015). A more strategic approach will prepare alumni, donors and prospective donors to make increasingly significant and planned gifts to all areas of Newman University. The Advancement Department should

leverage events to generate revenue and support while showcasing the school's boutique private Catholic liberal arts atmosphere.

Newman would benefit by engaging its holistic approach to cultivate relationships with students and alumni based on its core social identity and the unique identities of its community. The Advancement Department must effectively employ communications strategies to engage its student, alumni, and online community to feel bonded to the university. Finally, facilitating interdepartmental cohesion will attract donor potential, particularly from the school's large student athlete and Catholic population.

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APPENDIX A

Newman University Authorization

October 14, 2019

Michelle Nicome
5302 Yacht Haven Grande
Suite 105-130
St. Thomas, USVI 00802

Dear Michelle,

I am pleased to authorize you to perform your capstone project working with us at Newman University. We look forward to employing your expertise in fundraising and grant making, coupled with the learning you are acquiring in your doctoral program. Your research and recommendations will enhance our plans to grow and deliver on our mission of empowering graduates to transform society.

I look forward to working with you.

All best wishes,

Teresa Hall Bartels
Interim President

APPENDIX B

Newman University Site Visit
December 9 - 13, 2019
Newman University, Wichita, Kansas

Meetings with Newman's President, Staff, Board, Alumni, Students and Volunteers

Review of Primary & Secondary Data
- Review of the advancement department's programs and services
- Review of past surveys
- Review fundraising strategy
- Review fundraising and campaign strategies
- Assessments of the Advancement Department's CRM database
- Database management policies and procedures

Review Advancement Department's Operations
- Examination of operations, efficiency and compliance
- Review of development and fundraising procedures:
    o Assess gift processing, examine historical records/surveys, reporting, donor research, donor management, donor relations/stewardship/development marketing & communications.
    o Review key departmental relationships including marketing, university relations, admissions & student affairs, and IT/CRM

Review Advancement Staff
- Engagement in fundraising activities
- Tools and resources utilized to fundraise
- Training programs (webinars, conferences, zoom)
- Review customer relationship management (CRM) system

Advancement Relationships/Collaborations
Review of relationships between different divisions within/outside of Newman University
    o Advancement and Admissions Department
    o Advancement and Athletic Department
    o Advancement and Business Office
    o Advancement and Alumni Association
    o Advancement and Donors - Individuals, Foundations, Corporations & Community

Fundraising
- Staff and work distribution assessment
- Job description review and analysis
- Roles and Responsibilities
- Gift Acceptance, Annual Campaigns, Naming Policy, etc.
- Recommendations, staff/changes to support fundraising
- Review of Advancement organizational structure and projects
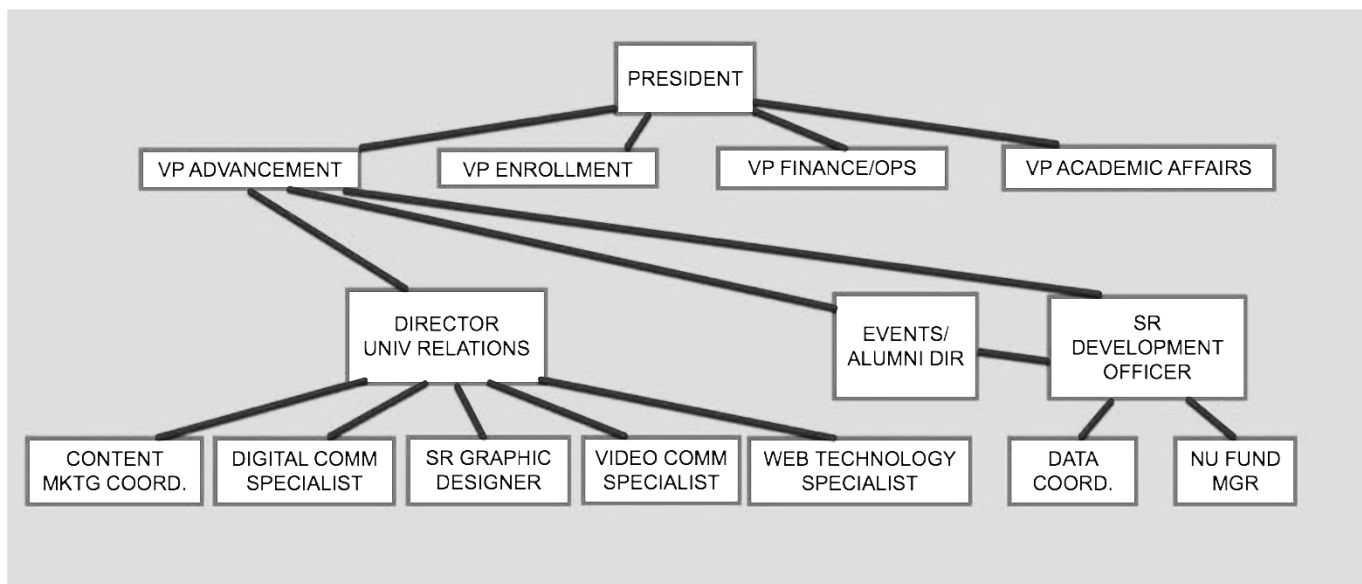
Policy & Procedure

Policies and procedures relevant to the Advancement Department:
- Data entry policies and procedures
- Donor management
- Gift acceptance documentation
- Gift entry policies and procedures (checks, EFT, ACH)
- Endowment policies and MOUs
- Naming Policies
- Donor confidentiality

APPENDIX C

Interview Questions

Staff

1. Do you have a job description? Do you have clear roles and responsibilities?
2. Do you have appropriate training and support materials for staff and volunteers?
3. How does the Advancement Department diversify its fundraising efforts?
4. What strategy do you use to cultivate relationships with students/parents, alumni, donors and prospects?
5. What strategies are you using to fundraise in general?
6. Do you have a strategic fundraising plan?
7. Do you think the Advancement Department has the appropriate staff and structure in place?
8. Is the current focus and direction of the Advancement Department fully aligned with Newman's strategic priorities?
9. Do you have an effective communications and marketing program to reach constituents?
10. Do volunteers also give to the organization (board members, parents, students, alumni, etc.)?
11. How are donor gifts and histories maintained? What CRM system do you use?
12. How are donor records kept?
13. Do you utilize moves management and record all donor interactions (date of solicitation, method used – in-person meeting/call, follow-up, and response)?
14. Are donor gifts potential evaluated, and are funding request amounts targeted for each prospect?
15. What are your standard operating procedures? What are your gift acceptance and fund development policies?
16. What transmittal mechanisms do you have to help donors give easily (checks, ACH, EFT)?
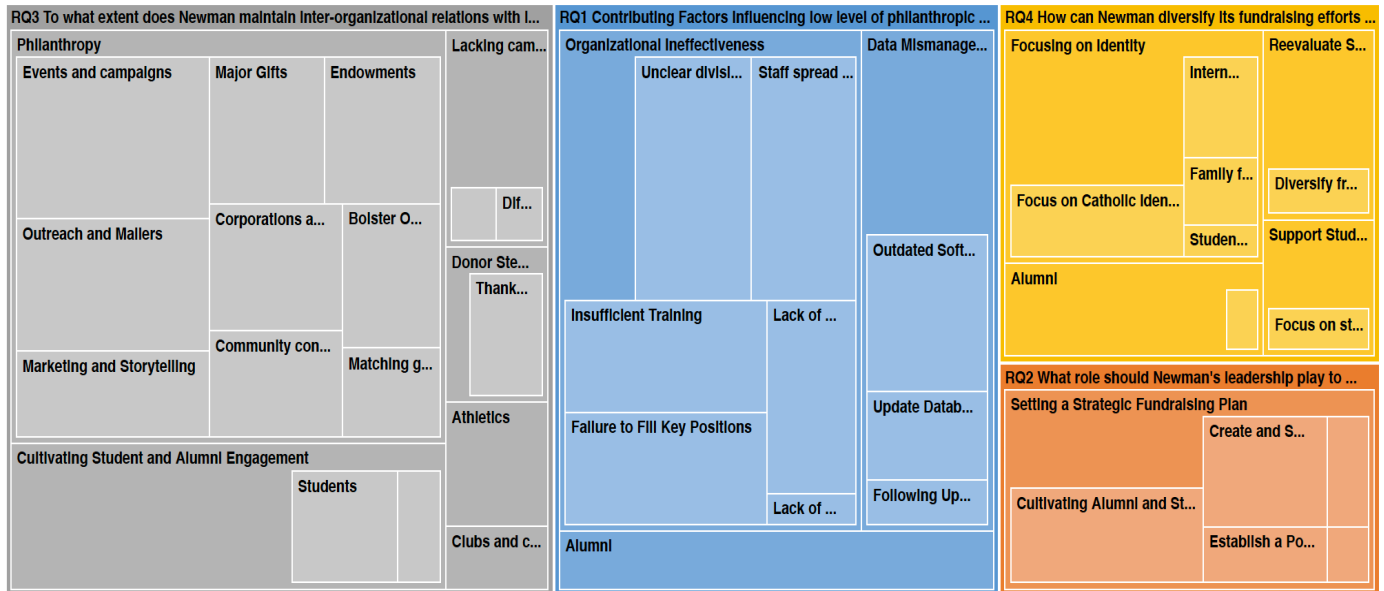17. Do you acknowledge donations within 48 hours of receipt?

Leadership

1. What is Newman's image in the community?

2. Are there clearly articulated roles, responsibilities and relationships between board and staff?

3. What role does leadership play in fund development?

4. How involved is Neman's board in fundraising? Are fundraising activities carried out by both the board and non-board members?

5. Does the board participate in strategic decision-making? Do they keep track of the progress of philanthropy/fund development for Newman?

6. Is the Advancement Department fundraising goals aligned with Newman University's strategic plan?

7. Is there a culture of philanthropy at Newman?

8. Is the board involved in donor cultivation (internal relations; relationship with community, constituents and enabling)?
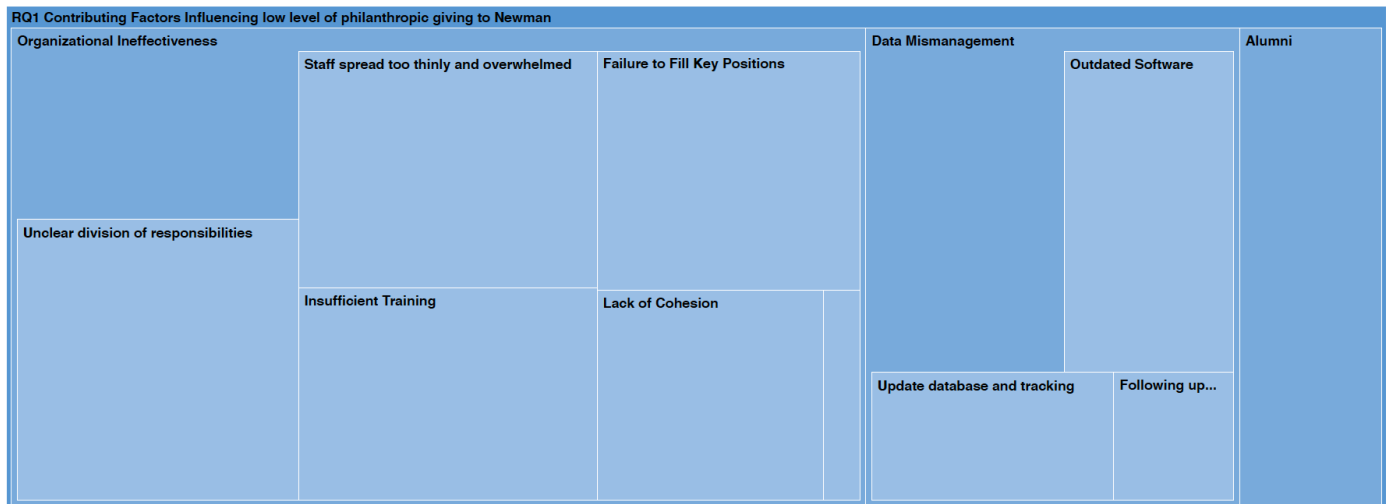
APPENDIX D

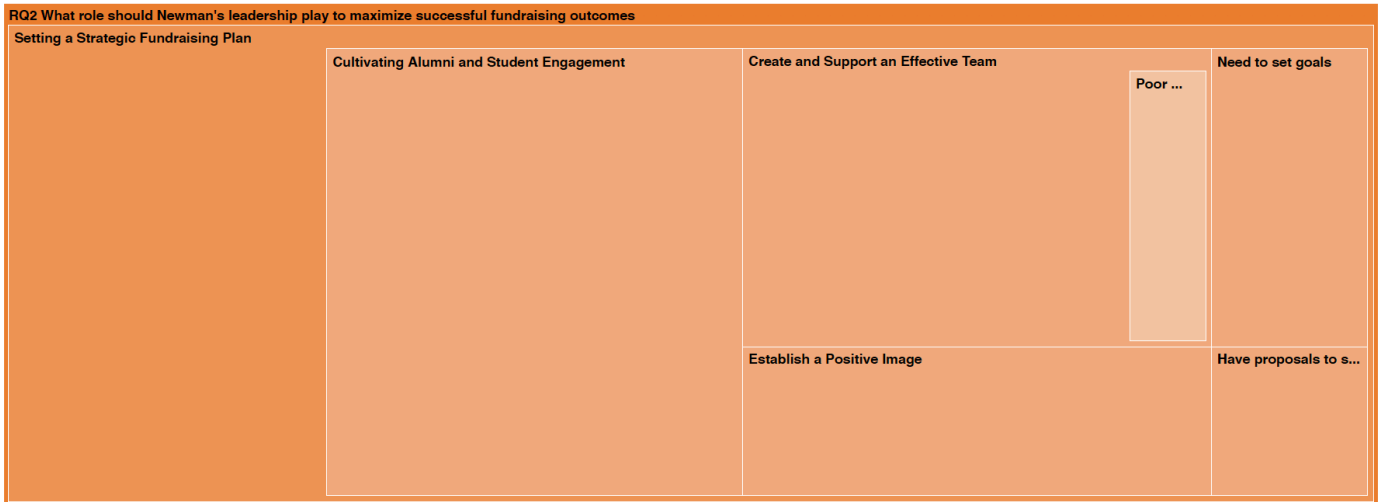*Qualitative Study NVivo Coding Tree Map*
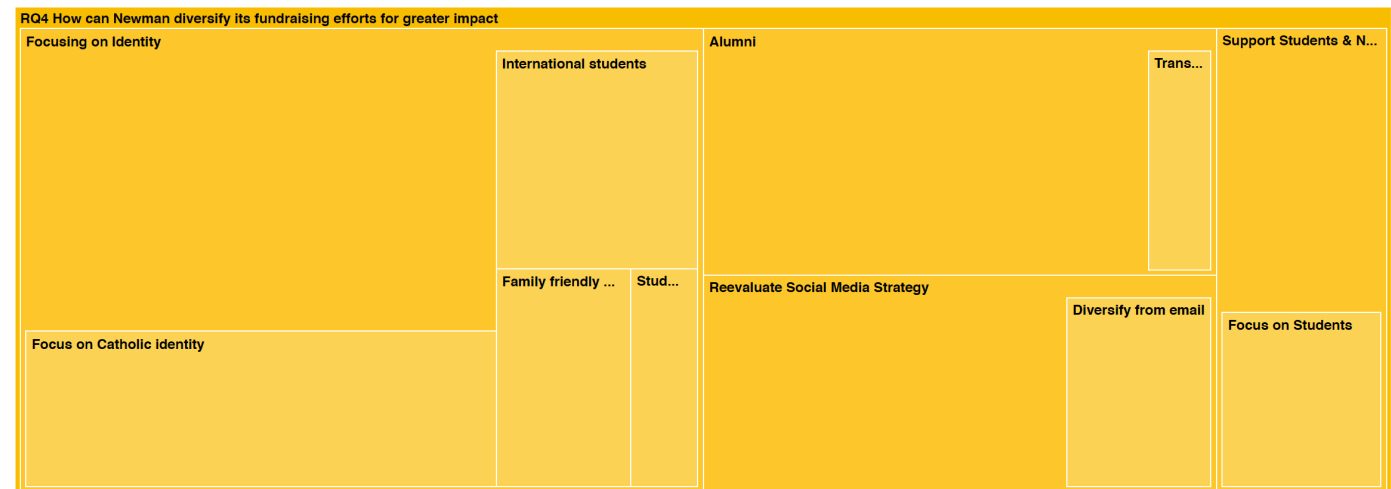
Hierarchy Coding Tree Map

Research Question 1

Research Question 2

RQ2 What role should Newman's leadership play to maximize successful fundraising outcomes

Setting a Strategic Fundraising Plan

Cultivating Alumni and Student Engagement

Create and Support an Effective Team

Poor ...

Need to set goals

Establish a Positive Image

Have proposals to s...

Research Question 3

RQ3 To what extent does Newman maintain inter-organizational relations with its community and philanthropic organizations

Philanthropy

Events and Campaigns

Lunch...

Marketing and Storytelling

Corporations and...

Community c...

Cultivating Student and Alumni Engagement

Students

Donar Stewardship

Thank donors ...

Major Gifts

Building student ...

Unc...

Athletics

Outreach and Mailers

Bolster Outreach Effo...

Search for ...

Matching g...

Lacking Campus Cohesion

Poor Interd...

Clubs and Campus ...

Endowments

Difficulties ...

Research Question 4

RQ4 How can Newman diversify its fundraising efforts for greater impact

Focusing on Identity

International students

Alumni

Trans...

Support Students & N...

Family friendly ...

Stud...

Reevaluate Social Media Strategy

Diversify from email

Focus on Catholic identity

Focus on Students

90

Transformational Philanthropy in Academia

Newman University DeMattias Hall