

Influences on Participation in a University Faculty and Staff Giving Campaign

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As tuition and state support become increasingly constrained, private fundraising is becoming an ever more important source of institutional revenue. Internal faculty and staff giving campaigns are a key part of fundraising efforts. This study, carried out at a mid-sized, state-assisted, Midwestern university, provided critical information about which types of employees are more likely to contribute and about faculty perceptions of the giving process. It should be of interest to institutional researchers and development officials at institutions where private giving is becoming increasingly crucial.

## Influences on Participation in a University Faculty and Staff Giving Campaign

The first few years of this decade suggest that state-assisted higher education is experiencing a familiar cycle of financial hardship. An economic downturn affecting state government, hesitancy to raise taxes, and ever increasing resource demands for Medicaid, K-12 education, and other priorities have led to cuts in state support for colleges and universities (AASCU, 2002; Kipp, Price, & Wohlford, 2002; National Center for Public Policy and Higher Education, 2002; Reindl & Brower, 2001). As state support declines (or at least fails to keep pace with institutional expenses) and tuition is constrained by state government, market forces, or both, campuses are forced to make hard choices. They can downsize, reallocate funds, and/or cultivate non-traditional sources of revenue.

Increasing private fund raising and externally sponsored research and service activities are key strategies for colleges and universities facing such circumstances (Buchanan, 2000; Brittingham & Pezullo, 1990; Rhodes, 1997; Worth, 1993). It is often difficult to build the infrastructure necessary for success in those activities, particularly at small and medium sized institutions with a past history of limited success. In the area of private fund raising, contributions from external donors are often influenced by the success of internal faculty and staff annual giving campaigns. Such internal campaigns often serve as an indicator of institutional vitality and success.

A considerable amount of literature exists concerning fundraising by non profit organizations generally and by colleges and universities in particular that offers some hints about donor motivations. People give for philanthropic reasons, to gain acclaim and friendship, to address their need to overcome guilt, in order to repay society for advantages that they have received, as an investment in activities that may later benefit them (e.g., sponsoring research projects), in order to obtain tangible perquisites such as honorary degrees (Worth, 1993). Giving is motivated by values (Greenfield, 1999). Giving is related to marital status, gender, age, income, educational attainment, religion, tax policy, established levels of trust and involvement with the institution, perceptions of the institution's management, and the perception of fundraising activities as ethical (Brittingham & Pezullo, 1990; Ciconte & Jacob, 2001; Worth, 1993).

None of these studies, however, speak specifically to the issue of faculty and staff participation in a college or university annual giving campaign. One study was found that addressed this topic. Holland and Miller (1999) surveyed full-time faculty at three universities to ascertain the relationship between

faculty characteristics, motivations for giving, and fundraising strategies. They found that senior faculty who were not graduates of their employing institution were more inclined to give; that primary motives for giving included altruism, a sense of social responsibility, self-fulfillment, professional attitude, conviction, and institutional loyalty; and that telephone solicitation was the most effective fundraising strategy. While the Holland and Miller study provides helpful background, it was limited by the fact that its population was comprised of faculty from three universities in Alabama and also because other potentially significant predictor variables were not included. The Holland and Miller study did not provide adequate specifics to completely address the issue of what makes for a successful faculty and staff giving campaign. The critical questions are Why are some employees more inclined to give than others?, Is there an identifiable relationship between faculty and staff characteristics and their giving behavior?, and Should giving campaigns be customized for particular categories of campus employees? The answers to these questions would be very helpful in planning future campaigns. This study answered these questions at one university and it is hoped that the findings may be helpful to other institutions as well.

#### The BGSU Study

Bowling Green State University (BGSU) faces many of the issues noted above. State budget cuts coupled with constraints on fee increases have forced the issue of gaining revenue from non-traditional sources to become a priority. The campus is preparing for a major comprehensive campaign. Both as evidence for external donors and as a fundraising strategy of its own, the University initiated an annual giving campaign, known as the Family Campaign, among faculty, administrative staff, classified staff, and retirees in 1998-1999. \$454,985 was raised and 35% of employees contributed in the first year. At the end of the 2001-2002 fiscal year \$699,020 was raised and the participation rate was 48%. While BGSU's Family Campaign has been among the most successful of its type in the country, the institution wants to learn how it can accomplish even more.

BGSU's Office of Institutional Research partnered with the Office of Development in 2002 to carry out a research study of influences upon faculty and staff giving to the Family Campaign. The study consisted of two parts. First, development, human resources, and alumni records were merged and analyzed to examine significant relationships between employee giving and personal characteristics including employee type, job classification, longevity at the University, gender, race, full-time vs. part-time

status, salary, city of residence, and whether the employee was an alumnus. A series of cross-tabulations, t-tests, and a logistic regression analysis were carried out to examine statistically significant patterns between various demographic characteristics and whether or not employees contributed to the 2001-2002 Family Campaign.

The study's qualitative phase consisted of interviews with 12 BGSU full-time faculty. The faculty participants were selected in order to ensure that the profile of the participants was roughly equivalent to that of all full-time faculty with respect to college, longevity at the University, gender, and Family Campaign participation. Eight interview questions were developed to gather information about faculty members' overall knowledge of the Family Campaign, best methods of receiving information, why faculty choose to give or not to give, how the Family Campaign should best be marketed to faculty, barriers or situations that prevent faculty from participating, possible concerns over the use of funds raised, the effect of giving by the academic leadership on the giving of rank and file faculty, and other information that participants cared to provide. A draft of the themes that emerged within the results was shared with the faculty participants as a member check to ensure validity.

## Results

### *Quantitative Phase*

Table 1 provides the study's quantitative results<sup>1</sup>. There was a statistically significant difference in the giving rate by employee group, with administrative staff more likely to give than faculty or classified (i.e., hourly wage) staff. More details can be understood when the employee groups are further subdivided by more specific work categories. This analysis showed a statistically significant difference, with employees in the Executive/Administrative/Managerial and Other Professional groups (both administrative staff) most likely to give and employees in the Skilled Crafts and Service Maintenance categories (both classified staff) least likely to give. There was a statistically significant difference between the giving rates of full-time and part-time employees, with full-time employees much more likely to give. There was a statistically significant difference in the giving rates by race. Blacks and Whites were more likely to give than Asians or Hispanics; the giving rate for American Indians fell in between these groups. The small number of persons in the minority groups tends to inflate the percentages. There was a statistically significant difference in the giving rates of employees concerning whether they were or were not alumni of

BGSU. Employees who were alumni were more likely to give. Employee home zip codes were used to determine whether or not employees lived in the City of Bowling Green. There was a statistically significant difference in the giving rate; those employees who lived in Bowling Green were more likely to give. There was a statistically significant difference in Family Campaign 2001-2002 giving rates based upon whether employees had ever given previously to the University; those who gave previously were much more likely to contribute again in 2001-2002. Although males were slightly more likely to give than females, the difference was *not* statistically significant. An analysis was also carried out to investigate statistically significant differences in the 2001-2002 Family Campaign giving rates based upon the amount of previous gifts to the University. Those with higher previous giving totals were much more likely to give in 2001-2002. There was a statistically significant difference in giving rates based upon employee average salary; those with higher salaries were more likely to give. There was a statistically significant difference in giving rates based upon the number of years employees have worked at BGSU; those employed for more years were more likely to give.

A logistic regression analysis was used to determine the relative strengths of the various employee demographic characteristics in explaining or predicting employee giving behavior. These results (shown in Table 2 for statistically significant effects only) reveal that having a previous giving history is by far the strongest positive predictor of giving to the Family Campaign. Other predictors include (in order), not being in the Faculty or Service-Maintenance work categories, being White, living in Bowling Green, having a higher salary, and not being in the Technical-Paraprofessional or Skilled Crafts work categories.

#### *Qualitative Phase*

All of the interview participants could articulate a basic sense of the purpose of the Family Campaign as a method for faculty to include BGSU in their charitable giving, to contribute to the University's revenue base, and to enhance BGSU's mission. A few participants noted that faculty-staff giving is used for external relations purposes to leverage gifts. With one or two exceptions, faculty participants had only a general sense that contributions to a variety of University funds "count" for the Family Campaign; one or two persons specifically stated that they were aware that contributions to sources such as the athletic club or the public television station "count." With one exception, none seemed to be aware that detailed lists of funds to which contributions can be directed exist. The one exception was a

faculty member in the College of Technology, who noted that a booklet of giving opportunities specific to that college has been developed and widely circulated. Many participants noted that they were unsure how the funds were used. Frustration was also expressed over the situation where faculty (or spouses) were also alumni and felt pressured by the University to give to both alumni fundraising efforts as well as the Family Campaign; participants felt that the Office of Development could be doing a more effective job of not making multiple “asks.”

Most faculty agreed that the current practice of using departmental representatives as the primary sources of information about the Family Campaign is a good one. Two participants stated that use of departmental representatives was perceived as too much of a “hard sell” and that they would prefer receiving written notices through methods such as direct mail, notices placed into pay stubs and information in the faculty-staff newsletter. Receiving e-mail and hearing multiple verbal reminders in various meeting and University events were noted as effective communication methods by one person. Most noted that faculty are so inundated with communications that no one way of providing information about the Family Campaign is particularly effective. The faculty member in the College of Technology stated that sending lists of college- or department-specific giving opportunities to faculty in each area would be effective. Others agreed that printed materials in general were effective.

A wide range of responses was generated in response to the question of why some faculty choose to contribute and others do not. Several senior faculty members cited poor morale and lack of community spirit or lack of faculty bonding with the University in general among faculty as relating to relatively low participation by faculty in the Family Campaign. Some participants noted that they choose to participate because they do have a strong allegiance and feel connected with to the University. It was noted by more than one participant that faculty have the greatest allegiance to their departments, then to their colleges, and finally to the University in general; as long as the Family Campaign is marketed (or perceived to be marketed) to general University-wide issues rather than department-specific needs, faculty participation will be limited. In related comments, other participants noted that they pay for instructional materials out of their own pockets due to inadequate departmental operating budgets and therefore they are hard pressed to give even more. These participants agree that direct appeals to support needs at the individual department level might cause more faculty to participate. Some participants stated that they declined to

participate (or stopped participating) due to disagreement with Family Campaign priorities (or perceived priorities). Another participant noted that he chooses not to participate because of a fundamental philosophical disagreement with the idea of asking the employees of an organization to give money to their employer. He stated that faculty make contributions to students every day while being employed at a far lower rate of compensation than could be had in the private sector. One participant noted that since many faculty are unsure of how their contributions will be used and also because they can only contribute small amounts, they fail to contribute at all.

A recurring theme among most of the faculty participants was that the Family Campaign's marketing approach of noting the variety of giving targets available to donors and highlighting a few University-wide giving targets is not succeeding with faculty because they want to see very specific ideas of how their contributions will benefit their own departments. Providing department-specific listings of giving opportunities and showing tailored examples of how this giving has benefited (or could benefit) each department would be a much more effective approach with many faculty. Sharing of more detailed information after each year's Family Campaign about how the contributions were actually used was also noted as a useful approach. Student scholarships and faculty research and travel support were noted as particularly appealing giving targets for faculty. Any perceived connection between the Family Campaign and athletics seemed to be a negative for many participants. It is particularly important among faculty that the Family Campaign not be perceived as a "hard sell."

Several participants stated that the low salaries of BGSU faculty compared to those at other universities prevents greater participation in the Family Campaign. Newer faculty who are earlier in their careers and not tenured are often starting families, paying off student loans, and personally supplementing their own research and travel expenses, memberships in professional associations, etc. at the same time that their pay is the lowest and their affiliation is perhaps the least as compared with other faculty; these conditions make it difficult for newer faculty to contribute. Conversely, many of the University's most senior faculty are saving for retirement. It was often noted that faculty are asked to contribute to many causes within their communities, to the institutions from which they graduated, etc. As noted above and discussed further below, uncertainty about how their contributions will be used may represent a barrier to participation for some faculty.

Participants were asked whether concern over use of funds was preventing some faculty from participating in the Family Campaign. Several were unsure and some were unconcerned about this issue. Several noted that they are not concerned about diversion of funds from specified targets but rather about being able to specify the source of their contributions as specifically as they would like. For example, some would like to donate to specific areas not already established, but they are unable to themselves meet the minimum dollar thresholds necessary to establish new funds. It was suggested that staff of the Office of Development meet with faculty in each department to explore faculty interests in possibly pooling their monies to establish new funds. Again, it was suggested that detailed information be shared each year after the Family Campaign concludes about how funds were used.

Most of the participants stated that they did not know about the giving behavior of leaders of their departments and colleges, although many expected that academic leaders should give. Most said that they would not be influenced by this even if they knew whether their department or college leaders gave.

### Implications

Prior to providing implications for the study it is necessary to acknowledge its limitations. The study was carried out at a single institution; the nature of the Family Campaign at BGSU and how faculty and staff react to it may be different from similar efforts at other institutions. The study was also limited to a single point in time. While the dozen full-time faculty interviewed were proportionately representative of all BGSU full-time faculty with respect to gender college, longevity, and participation in the 2001-2002 Family Campaign, there is no way to ensure that their perceptions are truly representative of their group. Since the goal of the interviews was to learn more about perceptions of the Family Campaign specifically on the part of full-time faculty, their responses can not be generalized to any other employee groups. The study should be repeated and possibly expanded, perhaps in two to three years, in order to confirm the validity of its results and in order to gage the usefulness of suggestions arising from the current study, should they be implemented.

Despite these limitations and the need for further research, several implications were evident from both the quantitative and qualitative phases of the study. The Family Campaign has been quite successful with administrative staff; moderately successful with faculty, secretarial/clerical, and technical/

paraprofessional staff; and largely unsuccessful with service maintenance and skilled craft staff.

Development staff at institutions with similar efforts might wish to consider changing their approach with faculty (the employee group with the largest untapped potential for giving), further investigating ways to increase participation by secretarial/clerical and technical/paraprofessional staff, and concluding that efforts with service maintenance and skilled craft staff may be of little benefit. They may also wish to consider the usefulness of solicitation of part-time employees or to limit their solicitation.

Development staff may wish to very carefully contact selected faculty and staff members of American Indian, Asian, and Hispanic heritage and further explore perceptions of and participation in efforts such as the Family Campaign. Alumni and development may wish to combine and carefully consider their efforts concerning solicitation of employees who are also university alumni since these persons are more likely to contribute but they are also sometimes frustrated by multiple solicitations; careful attention to this issue may lead to positive results. Since employees who do not live in the city where the university's main campus is located are significantly less likely to contribute, it may be useful to explore methods of making these people feel more integrated with the university community.

Due to the fact that those employees who contributed to the Family Campaign previously are much more likely to do so again, the importance of donor recognition can not be over-emphasized. While the strong relationship between salary and giving behavior is understandable, it may be appropriate to stress, especially to faculty and classified staff groups, more strongly that participation, not the dollar amount of contributions, is the goal. While the finding is taken as positive that participation increases with longevity at the university, these results suggest that more proactive outreach about the Family Campaign and like efforts may need to be done with new employee groups.

The findings of the qualitative phase of the study suggest that the development staff would be well served to change, target, and expand its efforts with faculty concerning the programs like the Family Campaign. While some faculty have strong feelings about the appropriateness of employee annual giving programs and others have a negative feeling about the University that relates to lack of participation, the interviews suggested that many faculty might choose to participate if they better understood the purposes of the Family Campaign and the use of funds collected and especially if they could see the relationship between participation in the Family Campaign and the addressing of needs and priorities in their individual

departments. Personalizing the Family Campaign to faculty, not only as a unique employee group but to different sets of faculty in different areas of the university, while clearly requiring considerable time and effort, may lead to substantially improved results.

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#### Footnote

<sup>1</sup> This paper provides a non-statistical discussion of the study results. More detailed results of the statistical analyses are available on request from the author.

Table 1

## Differences in Faculty and Staff Giving Behavior Related to Employee Characteristics

	Gave to the 2001-2002 Family Campaign	
<u>Employee Group</u>	<u>No</u>	<u>Yes</u>
Administrative Staff	226 40.3%	335 59.7%
Faculty	722 65.4%	382 34.6%
Classified Staff	693 68.5%	318 31.5%
<u>Work Category Group</u>	<u>No</u>	<u>Yes</u>
Executive/Administrative/Managerial	27 17.8%	125 82.2%
Other Professional	158 40.5%	232 59.5%
Faculty	628 67.2%	306 32.8%
Clerical-Secretarial	298 55.5%	239 44.5%
Technical-Paraprofessional	76 62.8%	45 37.2%
Skilled Crafts	33 89.2%	4 10.8%
Service Maintenance	290 89.8%	33 10.2%
<u>Full-Time or Part-Time</u>	<u>No</u>	<u>Yes</u>
Full-Time	1305 56.0%	1024 44.0%
Part-Time	336 96.8%	11 3.2%
<u>Race</u>	<u>No</u>	<u>Yes</u>
Black	30 49.2%	31 50.8%
White	1304 59.1%	902 40.9%

American Indian	6 66.7%	3 33.3%
Hispanic	61 76.3%	19 23.8%
Asian	35 77.8%	10 22.2%
<u>Alumnus</u>	<u>No</u>	<u>Yes</u>
No	1382 65.5%	725 34.4%
Yes	259 45.5%	310 54.5%
<u>Live in Bowling Green</u>	<u>No</u>	<u>Yes</u>
No	938 68.7%	428 31.3%
Yes	703 53.7%	607 46.3%
<u>Gave Previously</u>	<u>No</u>	<u>Yes</u>
No	828 88.6%	107 11.4%
Yes	486 34.4%	926 65.6%
<u>Gender</u>	<u>No</u>	<u>Yes</u>
Female	898 61.1%	571 38.9%
Male	612 59.7%	413 40.3%
<u>Mean Total Previous Giving</u>	<u>No</u>	<u>Yes</u>
	\$260	\$1,477
<u>Median 2001-2002 Salary</u>	<u>No</u>	<u>Yes</u>
	\$35,804	\$45,004
<u>Mean Years Employed at BGSU</u>	<u>No</u>	<u>Yes</u>
	10.6	13.4

Table 2

Results of Logistic regression Analysis Concerning faculty and Staff Giving

Predictor	<u>B</u>	<u>SE</u>	<u>Wald</u>	<u>Exp (B)</u>
Previous Giving History	2.56	0.14	324.38**	12.90
Work Category: Faculty	-1.19	0.26	21.16**	0.31
Work Category: Service-Maintenance	-1.58	0.41	14.86**	0.21
Race (Minority)	-0.62	0.20	9.31**	0.54
Live in Bowling Green	0.33	0.11	8.57**	1.40
Salary	0.00	0.00	8.06**	1.00
Work Category: Technical-Paraprofessional	-0.97	0.37	6.84**	0.38
Work Category: Skilled Crafts	-1.79	0.69	6.66**	0.17

\*\* p < .01