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Understanding the Role of Relationship Management Theory in Fundraising

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This is to certify that the doctoral dissertation by

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Walden University
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Abstract

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MA, Myers University, 2008

BS, Cleveland State University, 2002

Dissertation Submitted in Partial Fulfillment

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Abstract

Financial donations are critical to the sustainability of nonprofit organizations. While most nonprofit leaders understand the importance of building lasting relationships with their donors, many nonprofit leaders lack the knowledge and understanding of the strategies necessary to develop and nurture donor relationships. This study was conducted to explore donor management strategies leaders of nonprofit organizations use to retain donors. Ledingham and Bruning's theory of relationship management provided the framework for this study. An exploratory single case study design was used to answer the research question: How do leaders and staff of a successful community-based college access organization develop and maintain long-term relationships with donors? Data from semistructured interviews and company documents were analyzed using Colaizzi's seven-step approach. The following themes were generated from the data: (a) cultivation of multiple relationships, (b) communication outreach, (c) sustained engagement, (d) transparency, (e) volunteerism. The agency's current donor relationship management strategies foster the dimensions of trust, commitment, involvement, investment, and openness to build quality relationships with its donors. The findings add to the current research on donor relationship management in nonprofit organizations. The results of this study have potential implications for positive social change by offering nonprofit leaders potential strategies and processes to build a quality relationship with donors and potential efforts to increase donor retention rates.

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Chapter 1: Introduction to the Study

Introduction

Financial donations from private individuals play a vital role in promoting the financial stability of college access organizations (Althoff & Leskovec, 2015). For many education nonprofits that focus on college access services in low-income communities, private donations are the primary source of funding. Researchers have asserted that nonprofit leaders who develop strong relationships with existing donors may increase the likelihood of repeat donations (Barra et al., 2018; Peasely et al., 2018). With repeat donations, leaders of college access organizations may secure the funding necessary to achieve the organizational mission (Pressgrove & McKeever, 2016).

In the nonprofit sector, managing donor relationships is critical to developing solid relationships with donors (Barra et al., 2018). However, understanding how to manage donor relationships remains a challenge for many nonprofit leaders, particularly leaders of community-based college access organizations (Beldad et al., 2014; Ramanath, 2016). In this exploratory case study, I aimed to explore what strategies a community-based college access organization uses to manage donor relationships and how those practices contribute to donor retention for the organization. Findings from this study could have implications of positive social change by providing information that other nonprofit organizations could use to manage and sustain donor relationships.

This chapter includes a brief introduction to the current literature related to donor relationship management and the research gap this study was conducted to address. The problem statement and purpose statement are presented. Included in Chapter 1 are the research question and the conceptual framework that grounded this study. The rationale for the design and methodology of this study are addressed. This chapter also includes relative definitions, assumptions, scope and delimitations, and limitations associated with this study. Lastly, I address the potential contributions of this study in the significance section.

Background

Many nonprofit organizations depend on individual donations to maintain operations and provide services to marginalized and low-income communities (Beldad et al., 2014; Waniak-Michalak & Zarzycka, 2015). However, many nonprofit leaders cannot manage and retain donor relationships (Charles & Kim, 2016). According to Shen (2016), a nonprofit organization, on average, may lose between 40% and 50% of its newly acquired donors in the year following an initial donation. Nonprofit leaders' implementation of strategies to retain donors is essential in addressing the funding challenges of their organization. Retention of donors may assist nonprofit leaders in securing sufficient funding necessary to continue providing programs and services to their communities.

Bell and Cornelius (2013) attributed the loss of newly acquired donors to the fact that 1 in 4 nonprofit leaders have reported they lack the skills and knowledge to build effective relationships with donors. Additionally, competition resulting from increased growth in the number of charitable organizations may hinder a nonprofit leader's ability to regain support from lapsed donors (Pressgrove & McKeever, 2016). A nonprofit organization's financial viability and sustainability depend on consistent contributions from donors (Faulkner et al., 2016). Decreasing donations is a problem because sustained loss of financial support renders nonprofit organizations incapable of funding their services to the communities (Hopkins et al., 2014).

Influence of Communication on Donor Relationships

A few researchers have shared details on how communication influences the development of donor relationships (Feng, 2014; Najev Cacija, 2014; Williams & Buttle, 2013). Prendergast and Maggie (2013) explored the experiences of individuals providing long-term financial support to a child sponsorship charity. The researchers' findings indicated that charities should proactively manage communication between donors and beneficiaries to build donor trust and commitment (Prendergast & Maggie, 2013).

In another study, Bentley (2014) interviewed public radio professionals to identify best practices for managing relationships with donors. The study indicated that relationships were developed and managed through direct and mass communication with donors (Bentley, 2014). Maxwell and Carboni (2014) suggested that organizations use tailored communication as a strategic management tool for managing stakeholder relationships. Wiggill (2014) suggested organizations should practice two-way asymmetrical communication to build and maintain strong and mutually beneficial relationships with donors. McKeever et al. (2016) suggested that organizations implement communication and participation strategies to retain support from donors.

Communication Strategies for Managing Donor Relationships

Other researchers have documented the importance of and strategies for using communication to manage relationships with donors (Drollinger, 2018; Khodakarami et al., 2015). For instance, Thomas et al. (2015) examined the effect of direct mailing as a means of communication for building the relationship between an organization and its donors. Thomas et al. surveyed donors of a nonprofit organization that uses extensive direct mailings to manage relationships with its donors and explored the impact of different direct mailings on donors' behavior. The nonprofit typically sends two mailings based on a donor's previous response behavior. The nonprofit uses mailings to retain donors and mailings to request donors to upgrade their donation amount (Thomas et al., 2015). The nonprofit segments the donors and targets each segment with a specific mailing strategy. Thomas et al. reviewed the donation activity of 129,269 donors who contributed to the nonprofit over 5 years to determine the effects of the two types of mailings on donation behavior. The study results indicated that retention-seeking mailings had a positive effect on donors who upgraded. Additionally, study results showed that mailings used to request an upgrade in donation significantly reduced donor attrition rates. Thomas et al. (2015) suggested that nonprofit organizations should analyze donors' previous donation behavior to determine the design of a direct mailing. The authors concluded that the segmentation of donors and the appropriate type of direct mailing is an effective strategy for building relationships with donors.

Drollinger (2018) suggested that active empathetic listening is a strategy nonprofit leaders can use to build relationships with donors. Drollinger defined active, empathetic listening as the process whereby the listener receives verbal and nonverbal messages and attempts to assess the underlying meaning by putting themselves in the donor's place. Drollinger suggested that active empathetic listening focuses on the donor's points of interest and excitement and responds with a verbal acknowledgment. Drollinger (2018) proposed that nonprofit leaders can develop trust through deeper communication with donors. Active empathetic listening may enable nonprofit leaders to better understand donors' motivations and build donors' interests, desires, and expectations. The author suggested active compassionate listening may allow nonprofit leaders to be more effective in their attempts to promote donor giving by using a softer form of persuasion.

Despite previous research on the effectiveness of communication as a donor management strategy, there has been limited literature on nonprofit organizations' communication strategies to manage donor relationships and how those strategies contribute to donor retention. Moreover, other research has indicated that many nonprofit leaders have a limited understanding of managing donor relationships (Alborough, 2017; Bradley, 2015; Wiggill, 2014). Because repeat donations are essential to the sustainability of nonprofit organizations, there is a need to understand how and why donor relationship management is practiced (Middleton & Lee, 2020; Xiao & Yue, 2020).

Problem Statement

Since 2007, nonprofit organizations have experienced a decrease in repeat donations from first-time donors (Barber & Levis, 2013; Khodakarami et al., 2015). Over the last decade, donor retention rates have consistently been weak, averaging below 50% (Faulkner et al., 2016; Levis, 2018; Rhine & Flannery, 2015; Shen, 2016). Nonprofit organizations depend on donations from generous individuals to provide services to the communities they serve (Beldad et al., 2014; Waniak-Michalak & Zaezycka, 2015). Without donors' willingness to continue donating, many nonprofits would be forced to eliminate needed programs and services to individuals and communities (Faulkner et al., 2016). In the nonprofit sector, poor management of donor relationships is a problem that leads to donor attrition and fiscal instability (Beldad et al., 2015). Minor improvements in donor retention can significantly impact the amount and frequency of collected funds (Althoff & Leskovec, 2016). Building long-term relationships is critical to increasing the donor support that may lead to repeat donations (Bradley, 2015; Wiggill, 2014).

While there has been an extensive inquiry into donor management practices of nonprofit organizations, there has been little published research that focused on the processes nonprofit staff at an education-focused organization use to increase donor retention rates through the management of donor relationships (Boie, 2012; Feng, 2014; Wiggill, 2014). Moreover, few researchers have explicated and described the particular processes leaders of college access organizations use to manage donor relationships (Walker & McCarthy, 2010). Given such, further research is warranted into the strategies that leaders and staff of successful college access organizations use to practice donor management.

Purpose of the Study

In this qualitative case study, I explored donor management strategies that nonprofit organization leaders use to retain donors. The organization of interest for this study was a community-based education nonprofit in Northern Ohio. Leaders of this nonprofit organization have consistently maintained long-term relationships with some donors for more than 25 years. Examining how the organization manages the donor relationship yields insightful information about relationship management activities.

Findings from this study may contribute to social change by adding to the body of literature on information about strategies that nonprofit leaders use to maintain donor relationships and increase donor retention rates.

Research Question

Research Question: How do leaders and staff of a successful community-based college access organization develop and maintain long-term relationships with donors?

Theoretical Framework

Ledingham's (2003) theory of relationship management served as the theoretical framework for this study. Relationship management theory refers to the building, nurturing, and maintaining relationships with donors (Ledingham, 2003; Pressgrove & McKeever, 2016). Adherents of relationship management theory posit that effective management of organizational–donor relationships around shared interests and shared goals, over time, results in mutual understanding and benefit (Ledingham & Bruning, 1998). Ledingham and Bruning (1998) identified five dimensions upon which organization–donor relationships are initiated, developed, and maintained: (a) trust, which is the belief that an organization will do what it says it will do; (b) openness, which refers to the organization sharing plans for the future with donors; (c) involvement, which describes the organization being involved in the welfare of the community; (d) investment, which refers to the organization investing in the welfare of the community; and (e) commitment, which describes the organization showing commitment to the addressing the welfare of the community.

Relationship management has been advanced as an appropriate paradigm that adherents may use to understand and apply cultivation strategies that build effective relationships with donors (Ledingham, 2003, 2011; Wiggill, 2014). In this case study, I explored what donor management practices a nonprofit education-based organization uses to foster the dimensions of trust, openness, involvement, investment, and commitment, which Ledingham and Bruning (1998) identified as the foundation of initiating, developing, and maintaining donor relationships.

Nature of the Study

For this study, I used a qualitative single-case study approach. I analyzed interviews from participants and reviewed organizational documents to explore the donor management practices of a college access organization. College access nonprofits are direct service organizations that provide college information, advice, and application assistance to students and families (Institute for Higher Education Policy, 2012). A qualitative approach enables the investigation of a contemporary phenomenon in its real-life context (Cypres, 2015).

A qualitative study was appropriate for this research because I aimed to explore the donor management process of leaders and staff of a community-based college access organization (Marshall & Rossman, 2017). A qualitative approach is suitable when a researcher seeks to gain an in-depth understanding of a complex phenomenon in its natural setting. I selected a case study design because the focus of this study was an in-depth understanding of a phenomenon through a variety of data collection methods (Rudestam & Newton, 2014). According to Yin (2013), a case study design is appropriate when the focus of a study is to answer *how*. I chose a case study design to investigate how leaders and staff of a successful college access organization in Northern Ohio practice donor management and how those practices contribute to increased donor retention rates.

An education-based nonprofit organization was the target of this study. The focus was on college access in Northern Ohio as the unit of analysis. The study participants were the organization's leaders, management, and staff who participate in recruiting donors and maintaining donor relationships. I planned to recruit a purposeful sample of 10-12 participants to conduct semistructured interviews. In this study, I interviewed employees directly involved with fund development within a small nonprofit to gain detailed insights and descriptions of the organization's donor management strategies. An analysis of organizational documents was used to supplement information gathered from participant interviews. Documents included in the review were donor solicitation letters, acknowledgment letters, thank-you notes, newsletters, and annual reports. Selected documents corroborated information gathered from participant interviews. Selected documents also served as examples of the information collected in the discussions.

Definition of Terms

The following definitions include the meanings of terms used in this study.

College access organization: Organizations that provide college access programs to improve college readiness and enrollment rates for underrepresented populations (Harvill et al., 2012).

Communication: The process of making meaning, in which people make contact with one another (Solomon & Theiss, 2013). Communication may be written or spoken, verbal or nonverbal, face-to-face or digital (Stewart & Kamins, 2002).

Community-based organizations: A subset of the category *nonprofit organization*s, these private or public organizations address individual and group social and economic needs in a defined geographic area, usually no larger than a county (Institute for Higher Education Policy, 2012).

Donor management: The management function that establishes and maintains the mutually beneficial relationship between an organization and its donors (Broom & Sha, 2013).

Donor retention: The number of individuals who continue to give monetary support to a nonprofit organization year after year (Althoffe & Leskove, 2015).

Donor relationship: Bond created between an organization and those who give to that organization (Merchant et al., 2010).

Donors: Financial contributors to a charitable organization (Harrison, 2018).

Nonprofit: A nonprofit is an organization designed to serve the public without the intent of generating profits (Milway & Saxton, 2011).

Assumptions

Assumptions refer to aspects of a study a researcher believes to be genuinely accurate but that cannot be proven (Leedy & Ormond, 2013). For this case study, the first assumption I made as a researcher was that the organization would agree to participate in the research. I initially gained a tentative agreement from the organization to conduct the study, pending IRB approval from Walden University. Second, I assumed each participant could articulate the organization's management strategies to maintain donor relationships. Another assumption I made was that all documents obtained from the organization's administrator would be accurate as they related to the research topic. Lastly, I assumed the participants who volunteered would be the best sources for gathering information about the organization's strategies to maintain donor relationships. I assumed this because participants were selected from the organization among employees who directly work with donors.

Scope and Delimitations

Delimitations refer to a researcher's boundaries on a study (Rossman & Marshall, 1995). I selected a successful, community-based nonprofit in Northern Ohio to collect data regarding donor management strategies. The organization chosen has had continuous support from donors for over 25 years. Leaders and staff directly involved in the organization's fundraising activity were recruited to participate in semistructured interviews. Leaders and staff employed by the organization who do not interact with donors were not compelled to participate. Although other employees may have some knowledge of the organization's fundraising activities, it was unlikely that these employees would have in-depth knowledge of how donor management is practiced in the nonprofit organization. Although it would have been insightful to study multiple organizations that have sustained long-term relationships with donors, doing so would have been cost prohibitive due to the time, workforce, and financial resources needed to conduct such a large-scale study (Baxter & Jack, 2008). The targeted organization was centrally located to me and offered a unique opportunity to gain meaningful insight into the donor management strategies of a community-based nonprofit. I used the purposeful sampling method to recruit participants for data collection. The sample case to study was drawn from a single nonprofit education-focused organization. As such, findings from this study were not transferrable to other nonprofit organizations.

Limitations

Limitations reflect potential weaknesses that may impact a study (Marshall & Rossman, 2014). There were two limitations associated with this study. First, using a case study design with a small sample of participants limits the transferability of study results. I had anticipated the sample population to be 10–12 participants; however, downsizing of agency employees reduced the participant pool to four participants. This case study involved the processes of one organization. The selection of participants was limited to those individuals who could provide the most relevant and plentiful data concerning donor management strategies within the agency (Yin, 2017). The goal of this case study was to produce varied perspectives unique to one nonprofit organization in Northern Ohio. This study intended to describe a single college access organization's strategy to increase retention through donor management. Therefore, it was not expected that the results would transfer to other types of nonprofit organizations. The second limitation was that data from semistructured interviews and organizational documents may only reflect the circumstance of one organization, thereby further limiting the transferability of results across the general nonprofit sector (Yin, 2018).

Significance

This research was significant because current literature on how donor management influences donor retention is limited. Much of the relationship management literature has been focused on relationship measurements and outcomes related to the quality of the relationship (Feng, 2014; Pressgrove & McKeever, 2016). There is a need for leaders of nonprofit organizations to have information about practical strategies for developing and sustaining long-term relationships with donors that promote donor retention. Research has indicated that donor retention is a significant concern for nonprofit leaders (Barber & Levis, 2013; Bradley, 2015; Faulkner et al., 2016). This research could contribute to the literature with information about donor management strategies that contribute to donor retention. Providing information on the process a nonprofit organization uses to retain donors successfully may illuminate strategies that other organizations could use to increase their donor retention. Nonprofits depend on continued financial support to achieve their organizational mission. When nonprofits cannot obtain funding, many communities with large vulnerable populations risk losing needed services. The findings from this study may contribute to social change by assisting nonprofit leaders in creating strategies that may help retain their current donor base and contribute to financial viability, thereby enabling organizations to continue providing services to the underrepresented populations they serve.

Summary

Donor management practices are a critical component of donor retention in the nonprofit sector (Althoff & Leskovec, 2015). Despite the importance of managing donor relationships, many nonprofit leaders struggle with understanding how to implement strategies to develop and maintain relationships with donors (Ramanath, 2016). Without sustained donations, nonprofit organizations may be unable to provide needed services to communities (Faulkner et al., 2016).

Researchers have focused attention on communication effectiveness as a donor management strategy (Taylor & Miller-Stevens, 2018). However, few researchers have considered how the practice of communication strategies is used to initiate and maintain donor relationships (Bradley, 2015). In this case study, I explored the problem of nonprofit leaders’ lack of understanding of the donor management processes necessary for increasing donor retention rates.

In this study, I sought to contribute to the current literature by examining the donor management practices of a minor, successful community-based college access organization in Northern Ohio. Using Ledingham’s (2003) theory of relationship management as a framework for this study, I investigated how an organization builds, nurtures, and maintains relationships with its donors. A qualitative single case study enabled the exploration of the contemporary phenomenon of donor management in a real-life context. Analyzing participants’ interview responses and organizational documents helped me understand the organization’s donor management strategies that contribute to increased donor retention rates. In the next chapter, I present the literature review for the study.

Chapter 2: Literature Review

Introduction

Donor relationship management is essential to nonprofit organizations because strong relationships encourage donors to continue giving yearly (Pressgrove & McKeever, 2016). To retain donors, nonprofit leaders' acumen of donor management is rooted in strategy execution (Beldad et al., 2015). Central to the research topic is the theory of relationship management. Used as an organizing concept, relationship management provides a context through which nonprofit leaders may cultivate relationships with existing donors (Ledingham & Bruning, 1998). Several studies have shown that nonprofit leaders are constrained from fulfilling their mission by a lack of funding (Charles & Kim, 2016; Ramanath, 2016). Some researchers have linked nonprofits' lack of funding to the poor management of donor relationships. One of the contributing factors to nonprofit leaders' funding challenges is the lack of knowledge concerning the value of donor management and the implications for donor retention (Bell & Cornelius, 2013; Bradley, 2015).

This qualitative case study aimed to determine what strategies a successful nonprofit organization uses to manage donor relationships and how donor management strategies impact donor retention. Chapter 2 contains the literature search strategy used to locate articles relevant to the research topic. An extensive review of the theory that frames this study is also included. I provide an analysis of how the idea has been applied in ways similar to this study and my rationale for choosing this theory. Additionally, I include current literature related to the fundamental concepts of this study. This chapter concludes with a summary.

Literature Search Strategy

In developing the literature review for this study, I used journal articles and primary sources. I used Google Scholar, Walden University Library, and Thoreau to search for information regarding donor management and retention in the nonprofit sector. I searched multiple databases, including Business Source Complete, Academic Search Complete, AB/INFORM, ProQuest Complete, Google Scholar, and Taylor & Francis, to find peer-reviewed journal articles and studies based on keywords related to my topic.

I used the following keywords to identify articles relevant to my study: *nonprofit, fundraising, charity, charitable contributions, charitable organizations, donors, giving, donor attrition, donor retention, relationship management, donor management,* and *cultivation*. My search strategy involved using the terms above singularly or combined with other words. I searched for articles that were published no more than 5 years ago.

I also reviewed the bibliography section of selected articles to do a backward search. Additionally, I searched for authors who had produced studies related to my research topic. I reviewed approximately 200 sources. For my literature review, I used 160 articles to understand the empirical research surrounding donor management and donor retention. The following section includes information on the theory that frames this study.

Theoretical Foundation

Ledingham and Bruning's (1998) theory of relationship management was used to guide this study. Relationship management theory provides a context for explaining the management of organization–public (donor) relationships. In 1997, Ledingham et al. conducted a study to identify relationship dimensions that can be used to improve the quality of organization–public relationships. The authors interviewed telephone subscribers to determine what relational factors, if any, were important in determining their decision to stay with their current telecommunications company, given a choice among new competitors. Results indicated the subscribers perceived five relationship attributes that influenced their relationship quality with the telecommunications company. The relationship dimensions of trust, commitment, involvement, investment, and openness differentiated the subscribers who indicated they would remain or leave their current provider.

Relationship Dimensions

Trust

Ledingham et al. (1997) defined *trust* as the level at which the public trusts an organization to do what it says it will do. The authors suggested organizations should be truthful in sharing organizational goals with the community. Additionally, organizations should be honest about their plans for future development, employment, and other activities within the community.

Commitment

Ledingham et al. (1997) defined *commitment* as the organization's long-term commitment to the community it serves. Donors who believe the organization is committed to their community are more likely to commit to the organization. Ledingham et al. proposed that commitment involves the decision of the public to continue in a relationship with the organization.

Involvement

Ledingham et al. (1997) defined *involvement* as the level to which an organization is involved in the welfare of the community it serves. The authors contended that organizations should make known their involvement in the community. Organizations should sponsor local activities and become more involved with community activities, such as educational and youth activities (Ledingham et al., 1997). When public (donors) are aware of organization involvement in the community, it generates loyalty toward that organization (Ledingham et al., 1997).

Investment

Ledingham et al. (1997) defined *investment* as an organization's financial investment in the community it serves. The authors suggested financial investment may be in the form of supporting local philanthropic activities and providing financial donations to schools and other community services. Organizations may also invest in the community by working with community leaders on matters affecting the economic growth of the community. In a subsequent study, Ledingham and Bruning (1998b) found that organizations that invest in the welfare of the community tend to report a higher level of relationship quality with donors.

Openness

Ledingham et al. (1997) defined *openness* as an organization's willingness to be open when communicating with the public (donor) by sharing organizational plans with donors. The authors asserted that not only must an organization engage in activities that benefit the public, communicating these activities to the public is just as important. Building on the seminal work of Ledingham et al. (1997), several subsequent studies have been conducted regarding relationship dimensions (Ledingham et al., 1999; Ledingham & Bruning, 2000).

Development of Relationship Management Theory

Ledingham et al. (1999) examined whether the length of time in an organization–public relationship influences relationship quality. The authors surveyed 404 telephone subscribers to determine if length of time influenced the subscriber's perceptions of trust, commitment, involvement, investment, and openness. A multivariate analysis of variance (MANOVA) was computed to assess group differences based on the length of time the subscriber had been in the organization–public relationship. The findings indicated that the length of time of the relationship significantly influenced the perception of the relationship dimensions and the quality of the relationship. In addition, the study results indicated length of time in the relationship served as an indicator of behavioral predisposition toward the organization. The authors stipulated that the inclusion of length of time confirmed the link between the ratings of the relational dimensions and behavior.

The authors suggested that building relationships requires a long-term organizational commitment. Ledingham and Bruning's (1998) relational management view originated from public relations scholarship. Building on the work of Broom et al. (1997), Ledingham and Bruning (1998) defined relationships as "the state which exists between an organization and its public (donors) in which the actions of either can impact the economic, social, cultural, or political wellbeing of the other" (p. 62).

Adherents of relationship management advanced the notion that relationships are at the core of all organization–public (donor) relationships (Ferguson, 1984; Grunig, 2002). Ledingham et al. (1999) posited that the organization–public relationship is an economic and humanistic interchange between an organization and the public to obtain quality relational outcomes. Ledingham and Bruning (1998) conceptualized relationship management as a public relations function whereby management initiates, nurtures, and maintains a relationship between the organization and its public.

Ledingham et al. (1997) conducted a study and found that when organizations engage in activities that benefit their donors' public, the donors' satisfaction in the relationship with the organization increases. The author's multiphase mixed-method study was the first in many studies on organization–public relationships. Subsequently, in 2003, Ledingham explicated the theory of relationship management. Ledingham contended that relationships between organizations and donors thrive when the relationship is balanced with an equal investment of trust, support, and commitment by both parties.

Adherents of relationship management theory purport donor management strategies to build effective relationships (Ledingham, 2003, 2011; Wiggill, 2014). Effective relationships are those that produce positive perceptions and behaviors from donors (Ledingham, 1998). Ledingham (2003) proposed a "general theory of relationship management" that serves as a foundation for understanding the organization–public (donor) relationship. When both parties in an organization's public relationship perceive greater satisfaction, the relationship may be perceived as mutually beneficial. The theory of relationship management explores the influences on relationship development and offers strategies that practitioners may use to develop and manage effective relationships.

In 2000, Ledingham and Bruning published a book of original chapters by scholars from diverse disciplines, entitled *Public Relations as Relationship Management*. The book contained a variety of approaches to the relational perspective. In the introduction, the authors expressed their hope that the book would help build theory and practice around the notion of relationship management.

Ledingham and Bruning (2000b) conducted a longitudinal study constructed around a public information campaign. The authors examined the personal, professional, and community relationships between a bank and its public. The authors surveyed 1,200 participants to investigate the correlation between respondents' perceptions of their relationship with the bank and their level of relationship satisfaction. Results of the study indicated that donors' positive predisposition toward the bank varied with their organization ratings based on the relational dimensions previously developed by Ledingham and Bruning.

Additionally, the high ratings of the organization's public relationship correlated with the relational dimensions of trust, commitment, involvement, investment, and openness. Ledingham and Bruning (2000b) demonstrated that the five relationship dimensions impact how organization–public (donor) relationships are initiated, developed, and maintained.

Relationship management theory is best suited to explore donor management in a nonprofit context. Understanding the management strategies used within the organization selected for the research project may contribute to current literature on donor management and retention. In the following section I present empirical research on the five relational attributes advanced by Ledingham and Bruning.

Literature Related to Dimensions of Relationship Management

In this section, I will present studies that have used premises of relationship management theory as proposed by Ledingham (2003). The literature contained in this section was drawn from public relations, marketing, and management. The literature in this section contains information on studies conducted in the context of relationship management and relationship management theory.

Trust

Ledingham et al. (1997) operationalized trust as an organization doing what it says it will do. Several researchers have conducted studies regarding the importance of trust in organization-public (donor) relationships. Beldad et al. (2015) defined trust as the reliance by one person, group, or firm upon a voluntarily accepted duty of another person, group, or firm to recognize and protect the rights and interests of all others engaged in a joint endeavor or economic exchange. Beldad et al. examined the differences in repeat donation intention of Dutch and American donors and the factors that influenced their intention to donate again.

Beldad et al. (2015) posited that high levels of trust in a charitable organization would positively influence the repeat donation intentions of participants. The authors performed structural equation modeling to determine whether or not the factors influencing Dutch and American donors differed. Results indicated that trust in the charitable organization was relevant among Dutch donors and predicted their intention to continue donating. However, for American donors, the trust did not predict their intention to continue to contribute.

Shang et al. (2019) surveyed 17,000 donors from five large charities to measure donor satisfaction, trust, commitment, and their intention to give in the coming year. Results from the quantitative study indicated that trust in the organization directly affected donors' giving intention and behavior. Results also indicated that satisfaction, trust, and commitment positively affected giving intention. However, only satisfaction and commitment had positive direct effects on giving behavior. Specifically, the study results confirmed that satisfaction, trust, and commitment predicted what individuals intend to do but not what they will do.

Commitment

Ledingham et al. (1997) defined commitment in an organization's public (donor) relationship as its long-term commitment to the community it serves. Donors who believe the organization is committed to their community are more likely to commit to the organization (Ledingham et al., 1997). According to Ledingham and Bruning (1998), commitment involves the decision of both parties to continue a relationship. The commitment may also refer to how strongly both parties feel that the relationship is worth continuing and maintaining (Harrison, 2018). Donors who develop a commitment to a nonprofit organization tend to remain in these relationships because commitment serves to reduce uncertainty and vulnerability.

Sargeant and Farthing (2016) conducted a qualitative study to determine what drives donor commitment. The study included participants from five national charities in the United Kingdom. Focus groups were conducted to develop a survey to explore the relationship between donor commitment and giving behavior. The study indicated a relationship between donor commitment and the approach organizations utilize to deal with donors. The results indicated organizations should foster interaction with their donors. The authors suggested using appeal communications such as telephone calls, emails, and invitations to events to engage donors. Donors who shared organizational beliefs, communicated with the organization, and had multiple types of engagement with the organization expressed higher levels of commitment to the organization.

Barra et al. (2018) conducted a cross-national, quantitative study to determine if trust and commitment contributed to loyalty behaviors in organization–donor relationships. Barra et al. defined loyalty behaviors as the frequency of repeat donations. The researchers surveyed 355 Latin Americans and 440 Americans that had made at least one donation to a charity within a year of the study. The survey included scales in determining participants’ level of trust, commitment, and loyalty concerning the nonprofit to which they had donated. Results indicated trust and commitment are directly and positively related to donor loyalty. The relationship between trust, commitment, and donor loyalty was statistically significant.

Barra et al.'s study was first conducted in Latin America and repeated in the United States to allow for comparison between nations. Both studies showed similar results. The findings from Sargeant and Farthing (2016) and Barra et al. (2018) indicated that an organization's approach to dealing with donors might influence donor commitment. The authors offer different approaches to dealing with donors, which may be relevant to my research.

Involvement

Ledingham et al. (1998) defined the relationship dimension of involvement as the level at which an organization is involved in the welfare of the community it serves. Additionally, Ledingham and Bruning (contended that organizations should make known their involvement in the community. When the public (donors) are aware of the organization's involvement in the community, it will generate loyalty towards that organization. While there is limited current research on the relationship dimension of involvement in the organization's public (donor) relationship, I will present information regarding how relationship management in the context of volunteerism affects the involvement of volunteers.

Harrison et al. (2017) conducted a quantitative study to explore how maintenance strategies may help nonprofit organizations strengthen relationships with their volunteers. The authors employed a survey methodology to examine the variables of stewardship, involvement, and organization public relationship outcomes. A quota sample of 428 volunteers was selected. Findings from the study indicated

that when organizations acknowledged the volunteer's role in contributing to the mission, the volunteers reported being more engaged and increased involvement in the organization. Additionally, findings showed that involvement was positively related to trust and commitment. Results showed that when volunteers reported being involved with the organization, they reported feelings of being connected to the organization's work.

Participants were also more likely to trust and be committed to the organization. Harrison et al.'s (2017) work on volunteerism fills a gap in the organization-public literature by investigating the role of involvement as a relationship management strategy. By understanding the relationship between organizations and volunteers, this study may add empirical information on relationship management theory.

Investment

Ledingham et al. (1997) defined investment as an organization's financial investments in a community. Several studies have been conducted to examine how donors' perception of the organization's investment activities impacted the quality of the relationship. For instance, Cho and Auger (2017) conducted a qualitative study to explore the relationship between stakeholders' personalities, social media involvement, and the relationship dimension of investment. An online survey with a national sample of charitable donors was conducted to determine the relationships between personality, perceived relationship investment of the nonprofit organization, and involvement of the nonprofit organization. The authors used the International Personality Inventory Pool

(IPIP) to measure the personality characteristics of stakeholders and a variety of questions about their relationship as a donor to an organization. Cho and Auger's findings indicated that donors' personality influences their behavior which may determine how the donor perceives the organization's investment in the relationship. Cho and Auger (emphasized that donors' perception of the organization's investment in the relationship is a key to maintaining the relationship.

Handriana et al. (2015) asserted that organizations build relationships with donors by investing time, effort, and resources into their existing relationships. The authors conducted a quantitative study to analyze the role of relationship investment in establishing long-term relationships between organizations and donors. A survey was distributed to 507 participants to determine whether relationship investment positively affected donor gratitude, relationship commitment, trust, and intention to continue donations. Results indicated that relationship investment influenced relationship commitment, trust, and donor gratitude. Donor gratitude influences trust. Trust influenced relationship commitment. Relationship commitment, trust, and donor gratitude influenced donation intention. Handriana et al. concluded that trust and commitment might be linked to donors' perception of the organization's level of investment in the relationship. The authors recommended that nonprofit leaders enhance investment activities to build relationships with donors to improve retention rates. Research on the relationship dimension of investment is limited to quantitative studies. A qualitative approach may add to the empirical literature on relationship management strategies.

Openness

Ledingham et al. (1997) defined openness as the organization's willingness to be open when communicating with the public (donor). Openness may also be described as a form of transparency in which the organization goes beyond legal requirements to address relational expectations (Drake, 2015). Storie (2017) defined openness as the organization's desire to share internal information with stakeholders to contribute to a more symmetrical relationship. The research presented below provides information on how the relationship dimension of openness may contribute to building and maintaining relationships between organizations and the public.

Ruggiano et al. (2015) explored human service administrators relationship management strategies to develop and maintain relationships with policymakers. The authors identified six strategies access, openness, sharing of tasks, networking, assurances, and positivity. Ruggiano et al. surveyed 333 nonprofit human service providers in Florida to determine whether the relationship between the six strategies was related to nonprofit policy advocacy and the success of nonprofit policy advocacy. In this study, openness was defined as the organization sharing information with stakeholders and encouraging stakeholders to share information.

A hierarchical regression analysis indicated that the overall set of predictors was highly correlated with advocacy success. Moreover, both access and openness were significant predictors of policy advocacy success. The authors concluded that openness in the relationship between an organization the public it serves is critical to the relationship.

The perception of openness created a sense of trust between the two parties and facilitated cooperation over time.

In the previous section I presented current research findings on the relationship dimensions of trust, commitment, involvement, investment, and openness in relationship management. In the next section I will present information on community-based nonprofits, including leadership, funding, types of donors, and donors' motivation to give. I will also present current literature related to donor management and retention.

Literature Review

Community-Based Organizations Within the Nonprofit Sector

The nonprofit sector consists of tax-exempt organizations such as public charities, private foundations, chambers of commerce, fraternal organizations, and civic leagues (Urban Institute, 2018). According to the National Center for Charitable Statistics [NCSS] (2016), of the 1.5 million nonprofit organizations in the United States, there are 1,097,689 public charities. Public charities are of economic and social importance because they serve as vehicles for addressing conditions associated with poverty, social ills, philanthropy, and innovative approaches for addressing social problems (Bach-Mortensen & Montgomery, 2018; Lee & Markham, 2015). Public charities range in size and scope from small community-based organizations with small fiscal budgets to large universities, hospitals, and foundations with billions of dollars (NCCS, 2018).

The U. S. Department of Health and Human Services defined a community-based organization as a public or private nonprofit organization representing a community or a significant community segment and working to meet community needs (National Institute of Health [NIH], 2016). While some large nonprofits operate at multiple sites, community-based nonprofits generally operate in local geographic space (Zatepilina-Monacell, 2015). Community-based organizations are characterized by locally defined needs and services (Johnson, 2015). The missions of community-based organizations focus on meeting the needs of residents within the geographical areas in which they operate (Visser, 2015).

Funding Sources for Community-Based Organizations

Community-based organizations are a type of nonprofit charity established to serve the community in which it resides (Johnson, 2015). Nonprofit charities rely on three primary sources for funding: (a) government grants, (b) private contributions, and (c) fees for services (McKeever, 2015; Topaloglu et al., 2018). Commercial nonprofits, such as hospitals and universities, receive much of their income from fees charged for services (Topaloglu et al., 2018). Community-based nonprofits often depend on grants and donations to provide services to the community (McKeever, 2015). Because community-based organizations often provide services to individuals who cannot pay fees, public and private funding are required to sustain their operations (Cortis, 2016). The ability to secure funding is a challenge for many community-based organizations (McKeever, 2015). Researchers have examined challenges community-based organizations experience when attempting to secure sustainable financial support (Cortis, 2016; Di Lauro et al., 2019).

Cortis (2016) examined the types of nonprofit organizations that face challenges in establishing and sustaining streams of private financial resources. The author surveyed

521 Australian nonprofits to determine which organizations relied on client fees, business activities, and private contributions for funding. The author reported that larger organizations and those with volunteers were better able to generate private income through fundraising. The findings in this study also indicated the organization's main activity impacts their access to private income. Child, family, and youth services were better positioned than other services to receive private donations. Lastly, nonprofits outside the metropolitan area were the least likely to receive donations.

While the Cortis (2016) study was conducted in Australia, many community-based organizations in the US face similar challenges in securing private donations. The examination of donor relationship management may assist leaders of CBOs in eliminating the challenge of securing private funding. I selected a community-based nonprofit to investigate the donor management strategies used to retain donors for this study. This research may inform my research by yielding information on the unique position of CBOs within the organization-public context.

Nonprofit Leadership's Role in Fundraising

Nonprofit leaders may be involved in all aspects of the organization (Kearns et al., 2015). Nonprofit leaders are responsible for managing people and resources and obtaining monetary gifts to support the organization's mission (Najev Cacija, 2015; Scaife et al., 2015). In the U.S. nonprofit sector, leaders utilize various funding methods such as securing grants, obtaining government contracts, and soliciting donations (Erwin & Landry, 2015). Fundraising activities are carried about by the nonprofit leader and staff (Bradley, 2016).

Large nonprofit organizations with over $10 million in revenues tend to have a fundraising staff (Kearns et al., 2015). However, many leaders in the nonprofit sector may have the primary role of soliciting financial donations (Bradley, 2015). In many small nonprofit organizations, the leader may be the only person involved with fundraising (Sargeant & Shang, 2016). In the fundraiser's role, the nonprofit leader must secure consistent funding to fulfill the organization's mission (Faulkner et al., 2016). Schidlow and Frithsen (2016) contended that leadership skills might positively influence the fundraising success of nonprofit organizations.

Kearns et al. (2015) interviewed leaders of 20 nonprofit organizations to explore their skills in their role as leaders. In their qualitative study, the authors identified leadership tasks represent a spectrum of roles and responsibilities. The task included mission alignment, operations management, resource development, financial management, board relations management, and external links management. The results indicated interpersonal skills, specifically communication and trust-building were prevalent among 50% of the respondents. Nonprofit leaders' communication skills and ability to build trust have been linked to building quality relationships with stakeholders, necessary in securing financial donations. The authors asserted that leaders might not understand the importance and relevance of their role as financial managers of the organization.

As the primary financial manager, nonprofit leaders face the challenge of increasing fundraising capacities within their organizations (Almog-Bar, 2018). One way nonprofit leaders may increase fundraising capacities is by developing and managing relationships with donors. Decreases in government funding, competition among nonprofits and for-profit, and the increase in demand for services are among the financial challenges faced by nonprofit leaders (Raffo et al., 2016). In 2016, among nonprofit leaders surveyed, 52% of leaders indicated their organizations could not meet the demand for services due to insufficient funding (Independent Sector, 2017). In the nonprofit sector, fundraising requires leaders to produce financial results by securing private donations (Sargeant & Shang, 2016).

Individual Donations

Nonprofit leaders seek financial donations from individuals to enable nonprofit organizations to fulfill a community or social need (Faulkner et al., 2016; Khodakarami et al., 2015). In 2018, more than half of Americans (73%) donated money to a charity (Charities Aid Foundation, 2019). Individual givers contributed $292 billion or 68% of donated funds in 2018 (Giving USA, 2019). However, the number of individual givers has significantly decreased from previous years. The nonprofit source (author missing2018) reported a decline of 4% between 2016 and 2017 in the number of Americans who reported that they had donated money to charity. Through active solicitation, nonprofit leaders may acquire donations from charitable givers (Anik et al., 2014).

Donor Solicitation and Acquisition

Nonprofit leaders attract new donors through solicitation efforts (Barra, Pressgrove & Torres, 2018). A solicitation may develop and build a personal relationship with an individual or conduct an acquisition campaign (Shen, 2016). Breeze and

Jollymore (2017) explored the act of personal solicitation. Breeze and Jollymore examined the types of solicitations to determine what factors contribute to successful fundraising outcomes. Results from the study indicated that successful solicitation would encompass three factors; building a relationship of trust with the potential donor, the solicitor's ability to be honest, and the skill to effectively frame the needs of the organization.

Many organizations solicit donations via acquisition campaigns (Yarzan et al., 2015). Acquisition campaigns enable nonprofit organizations to reach millions of individuals in hopes of securing a large donor base (Shen, 2016). However, acquisition campaigns may be costly and result in organizational leaders spending more money to recruit than a donor (Perry, 2015). Researchers have shown that organizations that offer incentives to potential donors during their acquisition campaign may increase their chances of acquiring that donor (Anik et al., 2014; Duquette, 2016; Shehu et al., 2016). Incentives may be in the form of cash, discounts, or free admission to sponsored events.

Helms-McCarty et al. (2016) examined the impact of cash incentives on the acquisition of potential donors. The authors implemented a randomized control experiment via a direct mail campaign. Each address received a two-page letter with an incentive amount of $1, $5, or $10. The study results indicated potential donors who receive a promise of a $10 incentive gift to be added to their donation increased the likelihood of the charity acquiring a new donor. Helms-McCarty et al. suggested that acquiring a new donor is important when organizations look to increase their donor base. Additionally, offering an incentive to potential donors may assist in building a relationship with that donor. In the nonprofit sector, acquiring new donors can be more costly than securing repeat donations from existing supporters.

Donor Attrition and Retention

The survival of charitable organizations depends largely on monetary donations (Faulkner et al., 2016). To increase revenue, organizational leaders must attract first-time donors and persuade first-time donors to continue donating (Beldad et al., 2015). Nonprofit organizations depend on their leaders' ability to maintain a sufficient donor base that enables the organization's sustainability (McKeever, 2015).

The percentage of newly acquired donors who give a second donation is defined as the donor retention rate (Jameson, 2017). According to the 2018 Fundraising Effectiveness Survey Report, the donor attrition rate for US nonprofits has averaged above 50% since 2007. Nonprofit organizations are losing more donors than they can acquire or retain (Holloway, 2013). The costs associated with donor attrition, the loss or lapse of a donor, is an increasing problem in the nonprofit sector (Althoff & Leskovec, 2016; Shen, 2016). The Fundraising Effectiveness Project (2018) reported in 2017 that for every $100 gained in donations, $96 was lost through donor attrition.

Althoff and Leskovec (2015) explored various factors which impacted which donors made continuous donations over five years. The study indicated that 74 % of donors make only one donation to a charity, 14% of donors make a second donation to that charity, and only 1% of donors continue to make donations in subsequent years. The authors suggested that donor attrition is highest after the first donation. One of the reasons donors may stop donating to a specific charity is the many choices among charitable organizations from which to choose (Lewis et al., 2018).

Increased competition for donors' dollars has had a major influence on individuals' decisions to donate to the same organization yearly. In the United States, two thirds of all Americans donate to the 1.4 million charitable organizations. There are 1.4 million charitable organizations (McKeever, 2015). The number of charitable organizations givers may select from affects individual donors' decisions before deciding where to commit their resources (Bennett, 2015). Other factors have affected donors' lack of commitment to one charity (Shen, 2016).

While donors continue to give, decreased trust has also contributed to donors' switching behaviors (Perry, 2015; Shen, 2016). Moreover, in the nonprofit sector, individual givers may not readily commit to one nonprofit organization, again and again, causing decreased retention rates for the industry as a whole (Ramanath, 2016; Shen, 2016). Increasing donor retention rates may improve the financial viability of nonprofit organizations (Beldad et al., 2015; Pressgrove & McKeever, 2016). Understanding the value of donor relationship management may assist nonprofit leaders in developing strategies that may contribute to a decrease in attrition among their current donors.

Factors Affecting Donor Retention

Researchers have conducted several studies on the factors that impact donor retention in the nonprofit sector (Blum, 2017; Gorczyca & Hartman, 2017; Khodakarami et al., 2015; Scohl, 2019). Nonprofit leaders may miss opportunities to gain continued support when they do not understand and capitalize on donors' reasons (Pulido, 2018).

This section includes current literature that provides various perspectives on the nature and strategies that may affect nonprofit leaders' ability to retain donors.

Motivations to Give

Individuals who consistently support charitable organizations may give for altruistic reasons, moral obligation, self-satisfaction, identity salience, prestige, and desire to help others (Jamal et al., 2019; Pulido, 2018). Ziloochi et al. (2019) explored the factors that motivate donors to give money to healthcare facilities. Using a qualitative approach, the authors interviewed 36 informants to understand the factors associated with their giving decisions. The results indicated that the respondent's primary reason for donating was a feeling of altruism. The researcher's findings indicated that individuals motivated by empathy give at higher donation amounts and more frequently. Whereas lower giving amounts were associated with donors whose perceived fear of criticism was the motivating factor for giving. Other factors that influenced donors to give included perceptions of the need of others, creating a positive image to others, and moral values such as loyalty.

Ziloovhi et al. recommended organizations seek to understand the factors that motivate individuals to give and appeal to donors when attempting to build and maintain a relationship with donors. Ziloochi et al. hypothesized that perceived fear and empathy were predictors of different contribution amounts. Ziloochi et al. suggested nonprofit leaders manage their relationship with donors by framing activities that draw on individuals' compassion towards those in need. Additionally, an organization should enhance their empathy appeals and decrease their fear appeals when seeking donations.

Peasely et al. (2018) explored how a donor's identification with an organization and an individual's perception of prestige may influence an individual's motivation to donate. The authors conducted an online survey of 4,900 randomly selected patrons of a family-oriented educational museum. The authors measured identification with the organization, organizational prestige, attitude toward the organization, and donation intention. The findings indicated that individual perceptions of prestige were positively related to organizational identification. The study results from LSO indicated that organizational identification was positively related to the individual's intention to donate. Peasely et al. asserted that organizations should understand how the donor identifies with the organization to establish a relationship with the donor. The authors contended that when individuals can associate their identity with a prestigious nonprofit organization, they are more motivated to give and continue to give.

Taylor and Miller-Steven (2017) examined the role of identity saliency and relationship satisfaction among repeat donors. The authors surveyed 719 donors to investigate why they continued to support a particular nonprofit. The study results indicated that donors' perception of the quality of their relationship with the organization becomes more significant over time. Taylor and Miller-Steven contended donors are more influenced by relationship satisfaction, trust in the nonprofit, personal identity, connections to the cause, and satisfaction with the solicitation process.

Donors' motivation influences how much they will donate and to which organization. Understanding what motivates donors to contribute may strengthen the relationship between an organization and its public. Because building relationships with donors requires an understanding of donors' needs, understanding the factors that donors that motivate donors to give may be relevant to this exploratory case study.

Donor Trust and Loyalty

In the nonprofit sector, trust and loyalty are essential behavioral variables to donor retention (Barra et al., 2018). The authors conducted a study in Latin America to examine how trust and commitment may lead to loyalty among nonprofit donors. The research findings indicated that trust affected loyalty and loyalty affected commitment. Barra et al. noted, however, that a donor's trust in and commitment to an organization does not guarantee consistent donations. Barra et al. suggested that repeat donations over time require the formation of loyalty. Barra et al. operationalized three types of loyalty. Cognitive loyalty is based on the donor's beliefs about the organization, which makes it preferable to others. Effective loyalty relates to the donor's favorable attitude toward an organization. Lastly, behavioral loyalty relates to the frequency of repeat donations to the same organization. Previous research conducted by the authors indicated that donor loyalty is a significant variable in building and maintaining organization–donor relationships (Pressgrove & McKeever, 2016).

Trust plays an instrumental role in the donor's decision to donate to a charity time and time again (Glanville et al., 2016). Individuals that make charitable donations desire assurance that their resources will be used appropriately (Tremblay-Boire & Prakash, 2017). Sundermann (2018) suggested word of mouth may positively influence intentional donor loyalty.

Katz (2018) examined how perceptions of an organization's trustworthiness affected a donor's willingness to support a charitable organization. The author used a questionnaire to determine donors' perceptions of the organization's level of trustworthiness when exemplified by professionalism, proper management, corruption, and service quality. Results showed that only half of the respondents perceived those nonprofits operated professionally, provided adequate services, and treated donors' money appropriately. The authors further found that while perceived effectiveness was positively associated with the propensity to give, trustworthiness was not. The author asserted that nonprofit organizations might increase trustworthiness through transparency, increasing donors' tendency to continue donating.

Stewardship

When organizations demonstrate socially responsible management of donor funds, they demonstrate effective stewardship (Pressgrove, 2017). Researchers support the importance of nurturing a relationship with an organization's donors by demonstrating social responsibility. Kelly (2001) defined stewardship as an organization's donor management process in which communication with donors is continuous. Kelly contended that the organization's constant communication with donors ensures donors' ongoing connection with the organization. Kelly proposed three key communication strategies that comprise good stewardship: reciprocity, reporting, and responsibility.

Reciprocity was defined as an organization's public acknowledgment and recognition of a donor's contributions. Reporting was defined as the organization meeting legal and ethical requirements of accountability to the public. Lastly, responsibility was defined as the organization's effectiveness in conveying information on their work and instilling confidence in donors to use appropriate resources. Pressgrove and McKeever (2016) suggested that nonprofit organizations can build positive relationships with donors that may ensure continued support with the effective use of stewardship strategies ongoing.

Harrison (2018) examined stewardship strategies and the impact of involvement on the donor-organization relationship among higher education nonprofits. In this study, the author defines stewardship as an organization's ongoing conversation with its donors to deepen the relationship. An online self-administered survey was distributed to donors of a large university. Findings from the study indicated that the stewardship strategy of respect was the strongest predictor of organization-public relationship outcomes. Harrison asserted that respect involves nurturing the organization's public relationship by demonstrating concern, prioritizing donors' needs, listening, and understanding donors. Results also indicated that as donor relationships become more sophisticated with an organization, they positively experience stewardship and organization public relationship outcomes. Harrison's findings support relationship management theory as a strategy to create positive organization public relationships, leading to donor retention and increased giving.

Relationships

Researchers have found that organizations that build relationships with donors are more likely to receive continued support from those donors (Chang & Chen, 2019; Faulk et al., 2017). Shen (2016), in his study of first-year donation behavior, suggested donors who respond to a first-year appeal are more likely to fail to donate in a subsequent year. After a low-touch fundraising campaign, the author asserted many organizations failed to recapture donors. Two leading US nonprofits provided data on 21,166 donors. Shen conducted survival analysis on the data to determine the number of appeals, which donors received what attractions, and the type of appeal. The study results indicated donors who give more than one gift in a year were less likely to lapse in subsequent years. Shen's study results indicated that organizations must build relationships with first-time givers by targeted messaging, developing communication strategies, and increasing the number of appeals. Shen also suggested organizations vary the content, communication, and the number of appeals during the first year. Other researchers have indicated that nonprofit leaders may enhance their relationship with donors when utilizing effective communication strategies (Gao, 2016; Sweetser & Kelleher, 2016).

Drollinger (2018) explicated the role of active, empathetic listening (AEL) and the factors associated with building a relationship of trust and mutual goals with donors through communication. Using AEL, nonprofit leaders may position themselves to connect in a meaningful way to their donors. The process of AEL enables a listener to focus on the donor's verbal and nonverbal cues during a conversation to better understand the donor's motivation and expectation of the nonprofit.

AEL in the process of identifying with the donor by placing yourself in the donor's shoes, thereby understanding the donor's position when discussing the nonprofit. Drollinger suggested that nonprofit leaders who used AEL during conversations with donors may be better equipped to understand donors' needs and concerns. Drollinger proposed that nonprofit leaders who use AEL can communicate with donors on a deeper level while developing trust and commitment to the organization. Drollinger suggested that the use of AEL may equip nonprofit leaders to build healthy relationships with donors based on mutual understanding and trust.

Sung and Kim (2018) conducted a quantitative study to examine whether interpersonal communication approaches on social networking sites enhanced the organization's personification and increased perceived relationship quality towards the organization. The authors suggested that interpersonal communication with donors is an effective method for building relationships. Organizations that increased interaction with donors by responding to the donor's comments on the website had a significant positive effect on relationship quality. The authors suggest that two-way conversations between the organization and its donors are important in building an organization–donor relationship.

Handriana et al. (2015) analyzed the role of relationship-building in establishing relations with donors. The authors explored the effects of trust, commitment, and donors' gratitude towards the organization on long-term relationships with donors in Indonesia. The authors processed 507 responses from individuals who had donated to a charity. The author's findings indicated that efforts made by the organization might cause donors to have gratitude towards the organization. Additionally, results indicated that donor commitment to the organization is due to donors' perception of the organization's efforts to build a relationship. Lastly, the authors concluded that gratitude and respect for the organization might result in trust in the organization.

Many factors affect a donor's motivation to give to a nonprofit organization. Ziloochi (2019) noted a primary motivation for charitable giving is the donor's sense of altruism. However, donors may also contribute from fear (Banks & Raciti, 2018). Researchers agree that understanding donors' motivation to give may aid nonprofit leaders in developing and building relationships with donors (Pulido, 2018; Taylor & Miller Steven, 2017). Donors give to an organization because they trust the organization will do what it says it will do. However, donor trust does not always lead to repeat donations. Nonprofit leaders must build relationships with donors to build donor loyalty to the organization (Katz, 2018; Sundermann, 2018). Researchers have found when organizations develop effective relationships with donors, the donors are more likely to continue long-term financial support to that organization (Chang et al., 2016; Drollinger, 2018).

This section consisted of literature on the factors that motivate donors to give to nonprofit organizations. Donor relationship management is critical to building a long-term relationship with donors. The literature in this section supports the need for more research on donor relationships and how managing donor relationships may increase nonprofit donor retention. Much research has been conducted on the organization-public (donor)relationship. However, a better understanding of how organization-public (donor) relationships are managed is needed.

Findings from this study may add to the current literature on organization-public relationships, donor management, and donor retention. This project aims to examine the donor management practices of a nonprofit organization that has maintained long-term relationships with its donors. This study may aid nonprofit leaders in establishing donor management practices that may lead to long-term relationships with donors. Nonprofit leaders rely on donors to sustain the mission and goals of the organization. Building long-term relationships with donors through effective donor management may increase retention rates and enable nonprofit organizations to provide services to the community.

Summary

Community-based nonprofits are public charities that represent a specific community and serve that community's needs (Zatepilina-Monacell, 2015). Community-based nonprofits rely on private donations to meet their organizational mission (McKeever, 2015). Sargeant (2016) reported that nonprofit leaders are responsible for securing donations in many community-based organizations.

Nonprofit leaders experience challenges in securing donations because of a highly saturated market which has caused increased competition among nonprofit organizations (Raffo et al., 2016). Researchers have suggested nonprofit leaders should focus on keeping their current donors instead of acquiring new donors due to the high cost of solicitation (Perry, 2015). Donor attrition in the nonprofit sector is a problem for nonprofit leaders (Holloway, 2013).

While donors continue to give, donor switching behaviors have contributed to declining nonprofit donor retention rates (Shen, 2016). Many factors may contribute to increasing donor retention in the nonprofit sector. Understanding the various reasons donors give may impact nonprofit leaders' ability to persuade donors to continue giving to their organization (Harrison, 2018).

Donors may continue donating out of a sense of altruism, moral obligation, identity salience, or self-satisfaction (Tsipursky, 2017). Donors' feelings of prestige, empathy, and loyalty may also contribute to donors' decisions to continue to give (Barra et al., 2018; Katz, 2018; Peasely et al., 2018). Current literature indicates building, cultivating, and stewarding organization–donor relationships may play an essential role in donor retention (Drollinger, 2018; Sung, Bock, & Kim, 2020).

Much of the literature addresses the funding practices and challenges associated with nonprofit donors. However, a gap remains in the literature concerning the use of donor management strategies and the impact on donor retention. This study will explore nonprofit leaders' strategies to manage donor relationships and how those practices contribute to donor retention. Relationship management theory refers to the building, nurturing, and maintaining relationships with donors (Ledingham, 2003). This study will explore the donor management practices of a community-based nonprofit.

In the next section, I will present information regarding the research process for this exploratory case study. Begin with my role as the researcher, including details on my role as observer. Next, I will include an overview of the methodology for this study. I will present the logic used to select participants, including identifying the population, sampling strategy, and selection criteria.

Additionally, I will present my procedures for the recruitment of participants and the data collection process. Also, this section includes the sample size and the rationale for the sample size base on empirical saturation criteria. I identify the data collection instruments and sources, along with the suitableness of the instruments to answer the researcher's questions. This section includes my data analysis plan. Lastly, I will present ethical procedures required for this study and issues of trustworthiness. A summary will be included in this section.

Chapter 3: Research Method

Introduction

In this study, I aimed to explore the donor management practices that a small, successful community-based education nonprofit uses to retain donors. In this section, I present the rationale for choosing an exploratory case study design. I explain my role as researcher and observer. This section contains the identification and justification of the study population and the specific procedures for recruitment and selection of participants. This chapter provides an overview of the data collection instruments and the sources for each collection instrument. This chapter also includes the data analysis plan. In this chapter, I address the credibility, transferability, dependability, and confirmability of the research study. Finally, this chapter includes a discussion of the ethical procedures that I used to gain access to participants.

Research Design and Rationale

This research was conducted to address the following research question: How do leaders and staff of small, successful community-based college access organizations develop and maintain long-term relationships with donors? The research methodology for this project was qualitative. According to Park and Park (2016), the research approach must be suitable to address the research question. Qualitative methods are appropriate when a researcher aims to explore a complex issue in depth (Wong, 2014). Using a qualitative method enabled me to gather in-depth information from participants on their experiences and attitudes related to the phenomenon of donor management practices within a real-life context (Runfola et al., 2016).

A quantitative method was not appropriate for this study because quantitative methods are used to test hypotheses and generalize results from a sample to a larger population (Choy, 2014). Quantitative methodologies seek to quantify relationships and differences among variables (Park & Park, 2016). Because my objective was to understand and not measure the phenomenon, I adopted a qualitative approach (Dasgupta, 2015). A mixed-method approach combines quantitative and qualitative methodology, which made it not an appropriate approach for this study (Levy, 2015). I conducted semistructured interviews with the organization's leaders and staff and examined company documents to explore the donor management practices within a single organization. A qualitative approach to this study was appropriate for gathering data to address the research question.

Research designs within the qualitative tradition include case study, ethnography, grounded theory, phenomenological, and narrative (Kozleski, 2017; Marshall & Rossman, 2017). For this project, I used an exploratory case study design. Case studies are appropriate when a researcher focuses on one phenomenon or case that occurs in a bounded context of time and place (Cope et al., 2015). The purpose of this study was to examine donor management strategies nonprofit leaders use to retain donors. As such, selecting a single organization as the unit of analysis was appropriate (Yazan, 2015). Ethnographic studies are conducted to focus on large cultural groups that interact over time (DeVaney et al., 2018). Because my research project was about a phenomenon and not a cultural group, an ethnographic study was inappropriate. A phenomenological study is focused on the lived experiences of individuals and their subjective perceptions of the world (Lawlor & Solomon, 2017). In this research project, I aimed to understand how donor management is practiced within a unique organization; as such, a phenomenological design would not have been appropriate.

The use of a case study design enabled me to analyze data from different sources to explore the donor management practices of the organization (Yin, 2017). I used in-depth interviews and documentary records to uncover the target population's new information, beliefs, and values. These data allowed me to determine the strategies used in the organization's donor retention efforts. The selection of a case study as the most suitable approach was determined after carefully reviewing other study designs in the qualitative tradition.

I used an exploratory case study design for this study to explore a single phenomenon (donor management). The selection of a specific type of case study design should be guided by the overall study purpose of the study (Lewis, 2015). Explanatory case studies are recommended when a researcher aims to explain phenomena that are too complex for an experimental strategy (Ponelis, 2015). Because this study was not aimed at explaining causal links, an explanatory case study was not appropriate. A descriptive case study design may be used when a researcher's goal is to describe a phenomenon and the real-life context in which it occurred (Yin, 2018). While in this study, I examined the phenomenon of donor management practices within a real-life context, the focus of the research was not descriptive. The descriptive case study design was not appropriate for this study. Exploratory case studies aim to extend the understanding of a social phenomenon that may be considered complex (Boton & Forgues, 2018). Through an in-depth exploration of a single organization, I focused on the process of donor management rather than an outcome (Selcen-Guzey & Aranda, 2017). In this study, I aimed to identify and describe the donor management practices within a single organization by exploring company documents and gathering data from semistructured interviews. As such, an exploratory case study approach was appropriate for this research study.

Role of Researcher

For this study, I served as the sole researcher. For this single-case study, my role as a researcher entailed gathering, organizing, analyzing, and interpreting data from multiple sources (Goodell et al., 2016). In qualitative research, a researcher is the primary instrument of data collection (Brannen, 2017). My goal was to collect content-rich information about donor management practices from participants through semistructured interviews and a review of archival records.

Researcher Bias

A researcher's biased interpretations of participants' responses can negatively impact study results (Yardley, 2017). A researcher needs to be aware of how past experiences and current beliefs may impact the findings of a study. A researcher should address any researcher bias that may exist (Yardley, 2015). I have never had any personal or professional relationships with the organization's employees who participated in this study. However, my son did receive services from the organization. In 2012, my son was selected to participate in the organization's college readiness program. The organization provided college preparatory services to high school seniors. Students were assisted with the college application process. Services included visits to universities, one-on-one mentoring, and tuition assistance to attend college. As the mother of a recipient of their services, I was indirectly connected to the organization.

My potential biases include: the organization predominantly serves African Americans, a race to which I belong. The organization's clients are first-generation college students. I, too, was a first-generation college student. These conditions may contribute to researcher bias. Because I am familiar with the organization, I may have personal beliefs about the organization's services. These biases may have an influence on my interactions with the participants. My biases may also influence the data collection and analysis process.

To minimize the impact of potential biases, I performed bracketing throughout the research process. Researchers use bracketing to identify and put aside previous knowledge, assumptions, or preconceptions that may influence the collection or interpretation of the data (Fusch et al., 2018). Bracketing enabled me to keep the data analysis and findings focused on the topics by avoiding personal opinions or beliefs (Hamill & Sinclair, 2010). Throughout the research process, I bracketed my preconceptions and uncovered biases by writing memos in a reflexive journal. The bracketing enabled me to reflect on my thoughts, feelings, and preconceptions during the research process (Teh & Lek, 2018). I listed any biases identified during the process regarding the organization and topic of this research. My reflexive journal included assessing how my position as an outsider related to the context and setting of the study, the participants, and the study of the topic (Goodell et al., 2016). I also assessed any similarities or differences between the participants and myself that may have affected me throughout the research process (Berger, 2015). Keeping a reflexive journal assisted me in focusing on the experiences and attitudes of the participants as it relates to donor management (Dodgson, 2019). The use of reflexivity during the research process assisted me in staying objective in my collection and interpretation of the data, thereby enhancing the study's trustworthiness (Tek & Leh, 2018). Additionally, reflexivity during this process prevented my assumptions from influencing what data are collected and how they are analyzed (Berger, 2015).

Methodology

An exploratory case study methodology was used to examine donor management practices of a nonprofit organization. An exploration of donor management practices of a successful nonprofit organization requires a research approach to examine a complex phenomenon within its context using various data collection sources (Harrison et al., 2017). For this project, I selected a case study as the method appropriate to conduct an intensive analysis of management practices within the organization (Yin, 2018). The study was bounded by time, space, and activity within a natural environment (Katz, 2015). The purpose of the study was to examine donor management strategies nonprofit leaders use to retain donors. As such, selecting a single organization as the unit of analysis was appropriate (Yazan, 2015). The setting for this study was a successful community-based nonprofit in Northern Ohio. This section is an overview of the methodological approach adopted for this study.

Participant Selection Logic

Population

For this exploratory single-case study, the population of interest was leaders and staff employed at a nonprofit college access organization in Northern Ohio. A purposeful sampling process was used to recruit participants. A purposeful sampling strategy enables the identification and recruitment of individuals who are knowledgeable about or experienced with the phenomenon of interest (Palinkas et al., 2015). This project's phenomenon of interest was the organization's donor management strategies to retain donors.

Selection Criterion

The inclusion criteria for this study requires that participants must: (a) have worked for the organization for more than 2 years, (b) be knowledgeable about the donor management strategies within the organization, (c) have experience with donor management strategies within the organization, and (d) be knowledgeable about current donor retention efforts within the organization. Additionally, participants must have been available and willing to participate in an interview that would last up to 1 hour.

Flyers see Appendix A) were placed (in the organization's lobby. The flyer advertised the study and included information about the purpose of the study and selection criteria. The flyer also included information regarding privacy and confidentiality. Employees interested in participating were required to contact me via e-mail or the phone number listed on the flyer. Upon initial contact with potential participants, the following screening questions were used to ensure the participants met the criteria for inclusion: (a) How long have you been employed with the organization? (b) Are you knowledgeable about the organization's donor management strategies? (c) Do you have experience with the organization's donor management strategies? (d) Are you knowledgeable about the organization's current donor retention efforts?

Sampling Size

For this exploratory single-case study, I planned to interview 10–12 participants. There is no consensus of a definitive number of participants when selecting a sample size for qualitative studies (Fusch & Ness, 2015; Nilson, 2016; Palinkas et al., 2015). However, most proponents of the qualitative tradition tend to assert the use of small sample sizes when conducting qualitative studies (Marshall & Rossman, 2017; Merriam & Tisdell, 2015).

Gutterman (2015) suggested that the sample size should be appropriate for gathering the data needed to reach saturation. Data saturation occurs in the data collection process when no new information concerning the phenomenon of interest in a study (donor management practices in this study) can be identified (Nilson, 2016). (Merriam and Tisdell (2015) indicated that the sample size is often fewer than ten when researching small businesses. Marshall, Cardon, Poddar, and Fontenot (2013) asserted that sample sizes should generally contain from 10 to 30 interviews for single cases studies. My 10-12 participants selection aligns with case study sample size recommendations.

Instrumentation

When conducting qualitative studies, the researcher serves as the primary instrument for data collection (Kalu & Bwalya, 2017). For this study, I conducted semistructured interviews and reviewed company documents to gather data on the organization's donor management strategies. I obtained a letter of cooperation (LOC) (see Appendix B) to conduct the study, recruit participants, and review company documents. Interviews are one of the most commonly used data collection methods when conducting qualitative research (Fusch & Ness, 2015). I developed an interview guide to frame the initial questions and structure the interview process (see Appendix C). I used a recording device during interviews. A recording device enabled me to record participants' responses for use in the data analysis phase of this project.

Examples of the documents to be reviewed include: (a) annual reports from the years 2015 through 2019, (b) donor solicitation letters, (c) acknowledgment letters, (d) thank you letters, (e) company brochures, and (f) annual reports. I also reviewed articles appearing in the mass media, company website, and community newsletter that may pertain to the company's donor management practices and donor retention strategies. I used a document review protocol (see Appendix D) to track the data collected from documents and to record notes during document analysis. I examined documents to identify any information that may support or contradict the information gathered from interviews. I telephoned the agency's administrator to explain the document analysis process. I reviewed company documents in a private room at my home.

Procedure for Recruitment, Participation, and Data Collection

In this section, I provided details of the recruitment of potential participants for this study. A comprehensive overview of my collection process for each data collection method was also included in this section.

Recruitment

I received IRB approval, # 04-23-21-0495999 before the recruitment of potential participants. I also posted a recruitment flyer (see Appendix A) in the organization's lobby. Potential participants contacted me via the telephone number listed on the flyer. I established the eligibility of potential participants who got me and obtained their contact information. Potential participants received an email (see Appendix E) from me to confirm their continued interest. Potential participants who replied to the confirmation email were sent an informed consent form (see Appendix F). I selected four individuals that confirmed continued interest. Individuals selected for participation were contacted via phone to schedule a phone interview. An audio recorder will be used during the interview.

Participation

Each participant was scheduled for one interview of approximately 60 minutes. Participants were allowed to ask questions concerning the interview process. After participants gave final approval to be recorded, I began the interview. Participants were asked to respond to prepared questions from the interview guide (see Appendix C). Participants were able to ask questions after all interview responses had been recorded. I asked participants for permission to be contacted if clarification of their interview responses was required. I informed participants that I would email them a summary of their responses to ensure my interpretations were accurate. Interviews concluded with my acknowledgment of appreciation.

Data Collection

I used a demographic questionnaire (see Appendix G) and semistructured interviews to collect data for this exploratory case study. Additionally, I collected data from company documents. Interviews enabled me to elicit detailed information about the agency's donor management strategies as perceived by the participants (Yin, 2018). I used an interview guide (see Appendix C) containing open-ended questions to collect data. The interview protocol enabled me to focus the discussion on concepts central to the research question while providing respondents an opportunity to expand on their experiences with donor management (Marshall & Rossman, 2016). The interview guide also enabled me to structure the interview process to minimize subjectivity and bias (Yin, 2018).

Yin (2017) noted that researchers use documents as a data collection source to gather substantial contextual information to complement other primary sources. Documents selected for review were used to contextualize data collected during interviews. I used company documents to identify information that may support or contradict participants' interview responses. Yin (2018) asserted that the convergence of evidence may strengthen the credibility of a study.

Company documents such as internal memos on donor management activities provided me with unique and explicit knowledge of the donor management strategies used by the organization to retain donors (Ngulube, 2015). Internal documents also added to the research project by providing background information and historical insights on the research topic. Additionally, documents uncovered additional information not covered in participant interviews. Specifically, I looked for information concerning donor retention rates, the number of donors, the number of fundraising events, and the number of donor solicitation letters.

According to Cardno (2018), document review and analysis are common and complimentary case study research elements. I used a document review protocol (see Appendix D) to guide the selection of documents that will be reviewed. A reflexive journal was used to record information collected during my document analysis. The notebook was stored in a lockbox in my home. I contacted the agency to obtain the name and contact information of the person designated to assist me in gaining access to company documents. During the phone call, I explained the document analysis process, explained confidentiality, and responded to any questions.

Data Analysis Plan

Yin (2018) noted that data analysis aims to characterize, understand, and interpret the data to generate quality results. The data were analyzed using a combination of manual and computer-assisted coding (Miles et al., 2014). The primary data came from semi-structured interviews. Prior to the analysis of collected data, I transcribed the audio recordings from each interview into a Microsoft Word document for analysis. I accomplished the data analysis in a Microsoft Excel document.

Thematic content analysis was used to conduct an in-depth, focused analysis of the data. Thematic content analysis looks for patterns and meanings across a dataset (Belotto, 2018). Sony et al. (2020) noted the importance of a focused analysis to minimize analyzing data that are outside of the scope of the research question.

Percy et al. (2015) identified three types of thematic analysis that may be used to analyze qualitative data: inductive, theoretical, and thematic analysis with constant comparison. For this exploratory case study, an inductive process was used to derive concepts and themes from participants' responses and company documents relevant to the research question (Azungah, 2018). Inductive analysis is the process of assigning codes to segments of text. The researcher extracts significant statements that directly relate to the phenomenon (Welsch et al., 2018). I selected an inductive approach for the data analysis to derive the themes directly from the collected data and not be limited to concepts presented in the extant literature.

I use open, axial, and selective coding to identify meaningful information, categorize groups of related information, and identify themes (Peterson, 2017). The first cycle of coding consisted of open coding, which breaks down qualitative data into distinct segments. Open coding is the first level of coding used to identify concepts and themes for grouping into larger categories of information (Williams & Moser, 2019). The second cycle of coding consisted of axial coding, which was used to categorize and code patterns of ideas and concepts that emerged during the first cycle of coding. Researchers use axial coding to identify relationships between open codes). Selective coding was used to identify themes among the codes established during axial coding.

The data was systematically analyzed using a framework guided by Colaizzi's (1978) seven-step process. The Colaizzi method is a seven-step process that uses an inductive analytic approach to develop themes from participants' responses (William & Moser, 2019). I selected Colaizzi's method of data analysis because it is frequently used to conduct a systematic and structured approach to analyzing qualitative data (Sony, Antony, & Naik, 2020). Details regarding each of the seven steps are presented in the paragraphs that follow.

Step 1: Data Familiarization

I read and reread the interview transcripts and company documents to familiarize myself with the data and get a general understanding of the content.

Step 2: Identification of Significant Words and Phrases

In this phase of data analysis, I separated and grouped interview responses by question number. Each group of responses was designated a number corresponding to the interview question. I labeled participants' responses with a pseudo name. Next, I reviewed interview transcripts and subsequently company documents to identify significant words, statements, and phrases pertaining to the research question. I highlighted each significant or recurring word, statement, and phrase.

Step 3: Formulation of Meanings

In this phase of the data analysis process, a researcher must go beyond what the study participants said finding what they mean (Abalos et al., 2016). I copied and pasted highlighted groupings of data onto a separate Word document for further analysis. Next, I reviewed each interview and coded the participant's comments related to the significant words, statements, and phrases identified in this round of analysis. I developed a code sheet to use in coding the data. Each comment was given a 2-digit code, designating the interview question and the response number. I grouped together words, statements, and phrases that have similar content and paste them onto another Word Document.

The groupings were reviewed to identify and formulate common meanings among the data. Formulated meanings should be an accurate reflection of the intended meaning of the participants (Welch & Cox, 2016). At this point in my data analysis, I conducted open coding. Open coding is a type of inductive coding where codes are derived directly from the data (Blair, 2015). In open coding, a researcher applies a label description, definition, or category to distinct meaning units (Elliott, 2018). When conducting exploratory research, a researcher performs open coding during data analysis because it enables the themes to emerge from the raw data (Belotto, 2018). During this phase of data analysis, I assigned an open code that represented a descriptive label of the meaning of each group.

Step 4: Categorization of Meanings Into Themes

In this step of the data analysis process, I began reassembling my data that had been split during open coding (Theron, 2015). Axial coding was conducted to develop categories of data with similar meanings. Axial coding is a type of intermediate coding that is applied to condense and discern categories of codes through constant comparison (Ngulube, 2015). Meanings with similar content or focus were clustered together. I developed a theme for each cluster of meanings. The primary goal of axial coding is to reduce the number of codes to a smaller number of themes (Rogers, 2018). I reread each interview and coded participants' responses. Participants' statements were given an axial code. The new codes were added to the code sheet.

I performed selective coding to integrate and refine the first categorization of thematic codes. Selective coding was conducted to determine how themes interact with and relate to one another within a larger context (Azungah, 2018). The goal of selective coding was to identify and aggregate themes central to the theoretical framework and the research question. Participants' interview responses were reviewed and given a selective code. New codes were added to the code sheet.

Step 5: Exhaustive Description of the Phenomenon

At this stage of the analysis, I used the developed themes to provide an exhaustive and inclusive description of the phenomenon being studied. I reviewed, merged, and structured the themes to provide a fundamental structure of donor management processes as experienced by the participants and supported by company documents. My goal during this phase of the data analysis was to provide a complete and sufficient description of the dimensions of the phenomenon as extracted from developed themes. Direct quotes from participants were used to validate the construction of my exhaustive description of the phenomenon.

Step 6: Description of the Phenomenon

This phase of the data analysis provided a summary of the exhausted description provided in Step 5. In this focused description, I detailed the fundamental structure of participant's experience with donor management practices within a community-based college access organization.

Step 7: Validation of the Findings

Member checking is the process in which a researcher asks participants in the study to check the accuracy of the interpretation (Candela, 2019). Participants were provided a copy of my transcribed interview responses via email (see Appendix H) to verify their experience was accurately captured. I highlighted direct quotes that align with the research question. Direct quotes were used to support my conclusion. I provided an explanation of whether the findings support the original premise.

Issues of Trustworthiness

Trustworthiness is defined as the degree of confidence in the accuracy and interpretation of the data collected (Marshall & Rossman, 2016). In qualitative research, a researcher seeks to enhance the trustworthiness of the research and findings (Zimbardo & Boyd, 2015). Researchers may enhance trustworthiness by establishing credibility, transferability, dependability, and confirmability (Morse, 2015). The following section offered the strategies I used to ensure this research project is credible, transferable, dependable, and confirmable.

Credibility

Credibility refers to the extent to which researchers accurately represent and interpret the collected data (Flick, 2015). To enhance the credibility of this study, I conducted a transcript review with interview participants after all audio recordings of the interviews had been transcribed. I emailed participants a copy of my interpretation of their interview responses for review and correction. The email contained instructions to contact me via telephone for questions or comments concerning my interpretation of the interview responses.

Marshall and Rossman (2016) asserted that performing triangulation of multiple data sources increases the credibility of the research. During data analysis, I performed data triangulation of notes from my interview protocol, my reflective journal, transcribed interview data, and documentary evidence. I compared themes generated from interview responses with company documents to corroborate themes (Fusch et al., 2018).

Transferability

Transferability is achieved in qualitative research when the interpreted findings can be applied to other studies of similar phenomena (Connelly, 2016; Marshall & Rossman, 2016). I enhanced transferability by conducting purposeful sampling to recruit participants. Purposeful sampling is defined as a sample of participants that are recruited based on specific criteria (Korjstens & Moser, 2018). I selected participants with specific experience from a specific organization for this study. Inclusion criteria for this research project included participants who were employed at the agency selected for this study and were able to provide me with in-depth information related to the phenomenon being studied. Selected participants were required to have experience with and knowledge of donor management and donor retention within the agency.

Amankwaa (2016) asserted that the use of thick descriptions of participants' experiences may enhance transferability. To enhance the transferability of this study's findings, I provided thick descriptions of the participants and the research process. To provide a thick account of the research process, I documented the descriptive details of the context of the research, the research setting, the sampling procedures, the interview process, and the data analysis procedures (Ponelis, 2015). I also provided details on the selection of the organization and the interview participants (Korstjens & Moser, 2018). My intent of the documentation was to allow other researchers to transfer the assumptions and context of the study to a different setting (Daniel, 2018).

Dependability

Dependability refers to the extent to which a researches can replicate the procedures described in the study and conclude similar findings (Morse, 2015). Dependability is important in qualitative research because it ensures the reader that the research process is logical, traceable, and clearly documented (Nowell et al., 2017). To establish the dependability of my research project I used an audit trail and member checking.

An audit trail is a transparent description of the steps taken in the research from the beginning of the process to the reporting of the findings (Korstjens & Moser, 2018). An audit trail provided readers with evidence of the decisions and choices I made regarding theoretical and methodological issues throughout the study (Nowell et al., 2017). I have retained a complete set of notes on the decisions made during the research process to include: (a) reflective thoughts, (b) sampling decisions, (c) data collection instruments, (d) data management, and (e) the emergence of findings. The audit trail enabled the reader of the research a transparent and in-depth methodological description of the research process (Yin, 2017).

Member checking is the method of returning interviews and analyzing data to a participant for validation (Birt et al., 2016). Member checking is used in qualitative research to validate, verify, and assess the trustworthiness of the study results (Candela, 2019). I used member checking to enhance the dependability of the research project. I emailed transcripts of interviews (see Appendix H) to participants to read and verify their statements were accurately depicted. Participants were instructed to contact me via telephone if they believed the transcripts did not accurately reflect their interview responses.

Confirmability

Confirmability is defined as the degree to which the researcher can demonstrate that the data is based on the participant's responses and free from the researcher's bias (Flick, 2015). Confirmability deals with neutrality and impartiality (Houghton et al., 2013). Confirmability is closely related to dependability because both criteria involve the interpretation of collected data (Chowdhury, 2015). The steps I took to demonstrate the findings that emergde from the data and not my predispositions are reflexivity and triangulation.

Reflexivity involves self-awareness and analytical attention to the researcher's role during the research process (Teh & Lek, 2018). During this research process, I self-monitored the impact of my biases, beliefs, and personal experiences on the research project. I maintained a reflexive journal of my predispositions and how they affect my research decisions in all phases of the study (Korstjens & Moser, 2018).

Data triangulation may increase the validity of research findings by seeking the convergence of multiple sources of empirical evidence (Jentoft & Olsen, 2019). Data triangulation was used to achieve consistency in the findings by converging data from multiple sources. Interview responses and company documents were used in the data analysis phase of the study. I used company documents to corroborate or invalidate evidence collected from interview responses. The convergence of the data sources will enhance confirmability by grounding the findings in the data.

Ethical Procedures

When conducting research at Walden University, all students are expected to maintain ethical practices. Before conducting this study, I gained approval from the Institutional Review Board of Walden University (IRB). The IRB process ensured that my study met the ethical standards of research and the ethical treatment of the participants.

Participation in any research involving human subjects is voluntary, and a researcher is under obligation to is required to gain informed consent. The informed consent enabled the participants to voluntarily indicate their willingness to participate in the study. The informed consent details the research information, the process, and its risk. Additionally, information regarding anonymity, incentives, and the voluntary withdrawal process will be included in the consent form. All participants were provided informed consent via email prior to their involvement in the study. Participants will be given one week to review the form, contact me with any questions, and agree to participate in the study.

To protect participants' anonymity and the confidentiality of the organization, I assigned a pseudonym to the organization and identification numbers to the participants. Each document reviewed for the dad a corresponding identification number. I maintained a hard copy file of all identification numbers and the corresponding participant and document. The file is locked in a secure cabinet at my place of residence.

I collected and archived all data according to the guidelines set forth by the Walden IRB process. All audio recordings and subsequent interview transcripts are locked in a secured cabinet at my residence. Interview transcripts, personal interview notes, and notes taken from my document review was copied onto an encrypted, external hard drive and locked in a secured cabinet. All hard drives were erased, and all hardcopy documents will be destroyed three years after the study has been completed. As the sole researcher, I am the only person with access to the material I collected during the study and the final report.

Summary

In this chapter, I provided an overview of the selected research method for this exploratory case study. I included the research design and rationale. I addressed ethical issues and biases as they pertain to my role as the sole researcher. I put forward my methodology for the study. In the methodology section I included topics concerning recruitment, participation, and data collection procedures. Additionally, in the methodology section, I included the instrumentation to be used and my data analysis plan. In this chapter, I also identified issues of trustworthiness to include credibility, transferability, dependability, and confirmability. Lastly, I explained the ethical procedures involved in conducting this exploratory case study. In the next section I will present the findings of the study to include: (a) the setting, (b) participant's demographics, (c) data collection, (d) data analysis, and (e) the results.

Chapter 4: Results

Introduction

In this study, I aimed to explore donor management strategies that leaders of nonprofit organizations use to retain donors. Specifically, I explored how leaders and staff of a community-based education nonprofit in Northern Ohio manage relationships with their donors. I used the following research question to guide the study: How do leaders and staff of a successful community-based college access organization develop and maintain long-term relationships with donors?

In this chapter, I discuss the research study setting, participant demographics using pseudonyms, and how data were collected. I also describe the data analysis procedures I used and the themes that emerged. Lastly, I present the evidence of trustworthiness and a summary.

Settings

Participants in this study were recruited through a flyer posted in the lobby of the partner organization. Due to the COVID-19 pandemic health crisis, the agency was closed to the public, reducing the number of employees currently working. I contacted the agency’s chief external affairs officer via phone and requested assistance with posting the recruitment flyer and providing me with a letter of cooperation. I emailed the chief external affairs officer the recruitment flyer and the letter of cooperation. The letter of cooperation was signed and returned to me via email. Three potential participants contacted me via phone. I established potential participants’ eligibility and emailed each individual an informed consent form. Interviews were scheduled via email. A fourth potential participant contacted me the following week. Eligibility was established, an informed consent form was emailed, and the interview was scheduled via phone.

Due to the agency's recent downsizing of employees, only four participants were available to participate. In Chapter 3, I discussed anticipating a sample size of 10–12 participants to reach data saturation. However, data saturation was achieved through four participants' interview responses and review of organizational documents. I conducted four interviews via speakerphone. I conducted the interviews in my home where I am the only resident. Participants were instructed to call from a private area with no distractions. All participants agreed to be recorded. I used a personal audio recorder during the interviews. The audio recorder was locked in a secured box after transcription. To my knowledge, there were no personal conditions that impacted participants or their experience at the time of the study.

Demographics

The sample for this study included four participants who were leaders or staff of the partner organization. Three of the participants worked in the external affairs department. One participant worked in the marketing department. All participants had at least 5 years of experience working with a nonprofit. All participants had at least 2 years of working at the partner organization. Three participants hold a bachelor's degree. One participant holds a terminal degree. Participants were labeled Participant 1, Participant 2, Participant 3, and Participant 4 to maintain confidentiality.

Participant 1 is a woman who has been employed with the agency for over 7 years. She is the manager of special events and the development coordinator for the agency. Participant 2 is a man who has been a development coordinator for 2 years. The agency is the second nonprofit Participant 2 has been employed at. Participant 2's primary duty is overseeing all direct mailings to donors. Direct mailings include solicitation letters, acknowledgment letters, and thank-you letters. Participant 3 is a woman and is the chief external affairs officer for the agency. She has been employed at the agency for over 10 years and oversees the development department at the agency. Her responsibilities include all aspects of the development department as well as working with donors on a daily basis. Participant 4 is a woman who holds the title of director of marketing and communication at the agency. Participant 4 lends support to the development department in the form of marketing resources and also oversees the agency's social media platforms and all virtual communications with donors and potential donors. Participant 4 has been employed with the agency for 7 years.

Data Collection

A flyer was posted in the development department of the partner organization. Individuals interested in participating in the study contacted me via phone to schedule an interview. I used purposeful sampling throughout the recruitment process. Purposeful sampling enabled me to select participants who met the selection criteria.

I conducted a semistructured interview with each participant. Each interview lasted 30–45 minutes. Participants were asked 10 open-ended questions (see Appendix C) regarding the donor management activities used by the organization. I audio recorded each interview using a voice-actuated recorder. Each participant gave permission to be recorded. The recordings were transcribed using the Microsoft transcription program.

Transcriptions were emailed to participants for member checking. Participants were instructed to respond via email to me if there were discrepancies in the transcriptions. I received no emails from participants.

I was unable to enter the partner organization due to restrictions resulting from the COVID-19 pandemic. I emailed the recruitment flyer to the agency's chief external affairs officer, who agreed to post the flyer. All potential participants contacted me via phone to indicate their interest in participating in the study. In Chapter 3, I noted that 10–12 participants would be sufficient to obtain data saturation and answer the research question. However, due to the agency's downsizing of the number of employees and COVID-19 restrictions, only four participants met the eligibility requirements for the study.

I requested organizational documents from the chief external affairs officer via email. I received four documents: (a) an acknowledgment letter from the agency, (b) a thank-you letter to a donor, (c) a solicitation letter from the agency, and (d) an informational flyer. Organizational documents were transcribed and analyzed in a private area of my home. Organizational documents were analyzed to supplement interview responses. After data analysis, organizational documents were stored in a lockbox with the audio recordings.

Data Analysis

I took an inductive approach to the data analysis that enabled the themes to emerge from the data. I used Colaizzi's (1978) method to analyze the data used because this approach allowed an inductive analytical approach to developing themes from the data. I conducted the first and second cycle coding of the data. During the first cycle of coding, I read the transcripts several times and highlighted descriptive statements. I inputted the highlighted descriptive statements into a Microsoft Excel spreadsheet. For each interview question, descriptive statements were organized based on participants. I used an open coding approach to identify and create codes for the descriptive statements and phrases, and I manually coded the data using Microsoft Excel. This process enabled me to conduct more meaningful interactions with the data and develop interpretative insights (Mattimore et al., 2021). NVivo offers management of a large amount of data, but because I only had four transcripts and four documents to analyze, using a computer-assisted program was unnecessary. Additionally, the manual analysis allowed me to see the emergence of themes as I interacted with the data.

The descriptive statements were then colored coded for easy identification. I coded the descriptive statements with a concept that closely identified the meaning of each statement. The emergent themes identified during open coding included: (a) building relationships, (b) donor engagement, (c) multiple meetings, (d) outreach, (e) familiarity with the agency, (f) constant communication, (g) transparency, (h) events, (i) student stories, (j) emails, (k) mentoring, and (l) scholarships.

I used axial coding in my second stage of coding. The second cycle of coding consisted of grouping similar concepts and phrases and placing them into categories. For example, phrases related to meetings, events, and emails were combined into a category. I used another Microsoft Excel spreadsheet to organize and categorize similar phrases. Phrases that did not fall into a category were given a separate Excel spreadsheet and excluded from further data analysis. Selective coding was conducted during the third stage of coding. In this data analysis stage, I reread the categories constructed during axial coding to determine how themes interact with and relate to one another within a larger context and the research question. The following themes emerged from the categories: (a) cultivation of multiple relationships, (b) communication outreach, (c) sustained engagement, (d) transparency, and (e) volunteerism.

I read each organizational document several times to gain an understanding of the contents. Organizational documents included solicitation letters, acknowledgment letters, annual reports, thank-you letters, and a semiannual informational flyer. I highlighted significant statements and transferred the statements onto a Microsoft Excel spreadsheet. Highlighted statements were given a descriptive code. I then integrated the codes into the axial coding process of the interview responses. Descriptive codes that did not fall into a category were isolated and annotated. I used organizational documents to complement my primary data collection source.

Evidence of Trustworthiness

I established the trustworthiness of the findings from this study through credibility, transferability, dependability, and confirmability. I conducted a transcript review with each interview participant to establish credibility after all audio recordings were transcribed. Each participant was e-mailed a copy of their transcribed interview responses. Participants were given the opportunity to confirm or deny the accuracy of my transcription of the data. Participants were instructed to respond, via email, with any corrections to the transcriptions. I received no corrections from participants. Marshall and

Rossman (2016) asserted that performing triangulation of multiple data sources increases the credibility of research. I conducted data triangulation of notes from my interview protocol, transcribed interview data, and documentary evidence during data analysis. I compared themes generated from interview responses with organizational documents to corroborate themes. To establish transferability, I conducted purposeful sampling in the recruitment of participants. All participants met the eligibility requirements for the study. To enhance the transferability of the study, I provided descriptions of the participants, the context of the research, and the research settings. I provided thick descriptions of the research process, including the sampling procedure, interview, and data analysis procedures.

Dependability was established through an audit trail. I provided a complete set of notes on the decisions made during the research process to include reflective thoughts, sampling decisions, data collection instruments, data management, and the emergence of findings. The audit trail will provide a reader a transparent and in-depth methodological description of the research process (Korstjens & Moser, 2018).

To establish confirmability, I conducted reflexivity during the research process. Reflexivity involves self-awareness and analytical attention to the researcher’s role during the research process (The & Lek, 2018). During the research process, I self-monitored the impact of my biases, beliefs, and personal experiences. Data triangulation was conducted to achieve consistency in the findings by converging data from multiple sources (Jentoft & Olsen, 2019). Organizational documents were used to corroborate or invalidate evidence collected from interview responses.

Results

In the following section, I will present the findings of the data analysis. The following themes emerged (see Table 2) to answer the research question: How do leaders and staff of a successful community-based college access organization develop and maintain long-term relationships with donors? I centered this exploratory, qualitative single case study on understanding donor management strategies that leaders of the agency used to retain donors. Four participants’ responses from eight interview questions and organizational documents were analyzed to investigate how nonprofit organization leaders maintain long-term relationships with their donors.

Theme 1: Cultivation of Multiple Relationships

One of the primary themes to emerge from the data analysis was the agency’s leader’s formation of different types of relationships with donors and community members. Throughout the interviews, each participant reported that leaders and staff had established relationships that contributed to the agency’s donor retention rate. Subthemes were constructed to annotate the types of relationships participants.

Table 1

Theme: Cultivation of Multiple Relationships

Subtheme	Key words/phrases
Personal	Everybody knows everybody
	Ability of development team to establish personal relationship
	Based off of personal relationships
Community	Volunteers in the community
	Community gets involved
Business	Advisory board of business leaders
Agency	Community partnerships
	Assistance from board members
	Connection with the organization
Long-standing	Already knows us
	Know the work we do

Personal

Participants reported that the agency leaders had established many personal relationships that contribute to sustained donor giving. Participant 1 stated, "Much of the agency work is based on personal relationships." Similarly, Participant 2 reported, "The city is very tight-knit, everybody knows everybody." When asked what strategies does the organization uses to promote donor retention? Participant 4 stated, "The development team's ability to establish personal relationships with donors speaks to the strength of the team to engage individuals and let them know we want to know them beyond a dollar sign."

Community

Participants reported that the leaders and staff had developed community relationships by going out into the community to recruit volunteers and assist with community needs. Participant 3 stated, "Advisors go to community events to promote opportunities for community members to get involved." There was a consensus among participants that the building of relationships in the community enabled the leaders to promote the agency's activities and, in turn, secure financial donations. Participant 3 described the community as a very generous, philanthropic community. Participant 4 stated, "We could not do the work we do and reach a large number of students without the help of our community partners."

Business

Three of the participants reported that utilizing business relationships contributed to sustaining donor involvement with the organization. Participant 1 shared, "Our board assists with attaining and continuing donor relationships." "Having an advisory board of business leaders helps reach other donors," reported Participant 2. Responses from the participants indicated that the business relationship developed into long-standing relationships, which also contributed to maintaining donor relationships.

Agency

Participants' responses indicated that the agency had developed many partnerships with other agencies in the community. Participant 1 indicated that the agency's Board of Directors is very active in developing relationships with donors. Participant 1 stated, "We have a really robust Board of Directors with about 55 members. They are very prominent around the community, and they do a significant amount of assistance with continuing donor relationships." Participant 3 expressed the sentiment that many of the relationships were based on donors who have some type of connection with the organization.

Long-standing

Participants reported that many of the donors are aware of the agency's work and have developed relationships based on the long-standing service to the community. Participant 3 stated, "Many donors are already involved with us and they are familiar with our work." Participant 1 believes the agency has an effective relationship because many donors have a connection with the organization.

Theme 2: Communication Outreach

A prevalent response that emerged from the data analysis was an emphasis on the agency's communication efforts. The theme of communication outreach emerged as the primary theme. Responses from participants indicated that the leaders and staff used multiple forums in their communication outreach to donors and members of the community. Participant 1 stated, "We want to keep the lines of communication open, so we make sure we have constant contact with the donors." When asked what constitutes an effective relationship with donors, Participant 3 responded, "Effectiveness is based on communication". Participant 4 emphasized the agency's responsibility to listen to their donors and address their donor's needs.

Table 2

Theme: Communication Outreach

Subtheme	Key words/phrases
Constant communication	Constant contact with donors
	We stay in touch with donors
	Keep lines of communication open
Direct mailings	Get letters out quickly
	Share with donors through direct mail
	Add new donors to newsletter
Phone calls	We call donors and listen to them
	Make sure donors are hearing from us
Emails	Heavy on reaching out via email
	A lot of emailing
	Regular email communication
Direct contact engagement	Level of face-to-face
	We meet and chat with donors

Constant Communication

There were five subthemes that emerged from the analysis of participants' responses. The subthemes indicated the vehicles the agency used to communicate with donors. Three of the four participants pointed out that the leaders and staff are in constant contact with donors and members of the community. Participant 3 stated, "We work hard to stay in touch with our donors." Participant 2 stated, "We are in constant communication with our donors throughout the year. We do a spring and fall solicitation as well as smaller campaigns throughout the year. We stay in contact so we know what's going on with our donors." Participants indicated that there is an emphasis on ensuring donors hear from the agency. Participant 2 stated, "We keep the lines of communication open."

Direct Mailings

All participants indicated direct mailings to donors were the agency's staff's primary form of communication. Participant 1 asserted, "Through direct mailing, we share with donors to keep them in the loop about our activities." Participants' responses indicated the agency's use of direct mailing is paramount to communicating with donors. An analysis of organizational documents indicated multiple direct mailings to donors. Donors receive solicitation letters, acknowledgment letters, and thank you letters throughout the year. Participant 1 stated, "It is important to get acknowledgment letters out very quickly."

Phone Calls

The third subtheme derived from communication outreach was the agency's use of phone calls. The use of phone calls to donors was reported by all participants. Participant 4 expressed, "We make sure the donors are hearing from us." Participant 3 stated, "We call donors and listen to them." All participants expressed the importance of calling or emailing donors in order to keep them informed about the activities of the agency.

Emails

Another subtheme that emerged from the data analysis was the agency's use of emails as a communication vehicle. Emails were reported to be the most frequently used form of communication to donors. Participant 1 stated, "We are heavy on reaching out to donors via email." "Regular email communication is vital," stated Participant 4. Participant 1 stated, "The agency staff does a lot of emailing to donors."

Direct Contact

Interview responses indicated that the agency leaders assured direct contact with donors by scheduling multiple types of meetings in different settings. Participant 1 stated, “We are always having meetings with donors, whether for coffee or lunch.” Participant 3 stated, “We meet and chat with our donors.” Participants provided several accounts of direct contact with donors. Participant 1 explained that the agency’s leaders and staff communicate with donors during meetings and agency events. Participants describe agency and community events in which leaders and staff are able to have discussions with donors and community members. Interview responses indicated a high level of face-to-face engagement between the agency and donors.

Theme 3: Sustained Engagement

Closely related to communication outreach, sustained engagement emerged as another theme. Participants’ responses indicated that engagement with donors is critical to the organization donor relationship. In the data analysis process, participants’ responses indicated engagement was synonymous with stewardship and outreach. Participant 1 stated, “The quality of the organization donor relationship is largely based on the level of engagement the leaders and staff have with the donor.” Subthemes were derived based on the ways in which engagement with donors occurred. Participant 2 stated, “Our job is to keep everyone engaged.”

Table 3

Theme: Sustained Engagement

Subtheme	Key words/phrases
Meetings	There is a lot of coffee meetings
	Meeting for coffee or lunch
	There is a lot of outreach through meetings
Emails	I engage through regular email communication
	We are heavy on reaching out to donors via email
	There is a lot of emailing donors
Events	We engage donors with our events
	Bag lady event
	50 people forward
	We have numerous events throughout the year
Social media	I engage through social media
	We provide webinars via Zoom
	There is outreach through virtual communication

Meetings

Participants' responses indicated conducting meetings with donors provided the agency a way to keep donors engaged. Meetings for coffee or lunch were a recurring response from participants. Participant 1 disclosed, "We have lots and lots of meetings with donors." Participant 2 stated, "There is a lot of outreach through meetings." Participant 4 shared the sentiment in the statement, "We do a lot of stewardship in terms of coffee meetings." All participants reported the agency does significant outreach with its donors.

Emails

Responses from participants indicated emails were the typical forum used to promote engagement with donors. Participant 4 stated:

> I regularly engage donors through email communication. I make sure donors are aware of what's going on with the agency and continue to loop them in about new developments, share relevant information, and try to demonstrate what their support means to the agency.

Participants emphasized much of the engagement was conducted through emails. Participant 1 stated, "We are heavy on reaching out to donors via email." Participant 2 remarked, "There is a lot of emailing to our donors."

Events

Participants described the various events the agency host that give the leaders and staff in the opportunity to engage donors. Participant 4 stated, "Through numerous events we hold throughout the year, we try to keep the donors engaged and we remind the donors of why their support matters and what exactly their financial support is doing." Participant 3 described an annual event in which the agency engages with existing donors and attempts to acquire new donors. Participants 3 and 4 recounted the success of a biannual event in which the goal was to gain new mentors for the agency's mentorship program. Participant 2 stated, "We have our biannual event, 'bags to bourbon' where we attempt to get new mentors for our students."

Social Media

The use of virtual communications as a forum for engaging donors was reported by all participants. Participant 4 reported the agency uses all social media platforms as an engagement vehicle. Participant 4 stated, "I engage with donors through emails, but we are also on all social media platforms such as; Twitter, Facebook, LinkedIn, and

Instagram. We have a really robust social media presence that helps promote the agency's activities." Participant 1 discussed the agency's use of webinars and zoom clips to bring interesting topics of discussion to the donors. Three of the participants emphasized the agency's use of emails as the major form of engagement with donors.

Theme 4: Transparency

Responses from participants indicated the leaders and staff are transparent about the activities of the agency, including financial activities, client services, and the impact on the community. Participant 3 disclosed that transparency is an integral part of the quality of the relationship the agency has with its donors, she stated, "I am very transparent with the donors. Sometimes I make mistakes or I am not as prompt as I should be, but we always try to keep everyone aware of what is going on."

The document analysis supported the interview responses. Documents contained yearly statistics on financial contributions from donors, scholarships provided by donations, number of clients served, graduation, and retention rates of the clients. Participant 4 believed that trust in the agency is based on organizational transparency. This participant stated, "We are honest about the places we have struggled. It is important to be extremely transparent".

Table 4

Theme: Transparency

Subtheme	Key words/phrases
Student stories	Show how support impacts students
	We tell student stories at all events
	Solicitations with specific student stories
Social media	Social media informs the community
	Show improvements in graduation rate
	Show exact impact on community
	Provide accurate information
	Keep community informed
	See every facet of organization
Direct mailings	Keep donors in the loop
	Our annual report
	Add new donors to newsletter
	Get acknowledgement letters out quickly

Student Stories

All participants reported that the use of student stories enables the agency to show how the services that are provided support the clients being served. Participant 2 stated, “We tell a lot of the student stories to show donors how we are helping the students.” Participant 4 stated, “We often use examples of actual student stories in our main communication and outreach efforts.” Participant 3 stated, “We tell the students stories at all our events.” An analysis of the organizational documents indicated that each acknowledgment letter and thank you letter contained a student story and how the donation supported the student.

Social Media

Participants reported the use of social media to keep the donors and the community informed, to show improvements in graduation rates, to provide accurate information concerning the agency, and to show the impact of the agency's services to students. Participant 3 stated, "Social media is a very good way to keep donors in the loop." Participant 3 stated:

> "The agency is unique in that we do a very good job in demonstrating to different audiences, through our social media, the exact impact our work has had on various aspects of the community and why it is important for the community to invest in the agency."

Participant 4 stated, "I make sure donors are aware of what's going on with the agency. I keep the donors in the loop them in about new developments and share relevant information that would keep donors interested in what's going on with the agency."

Direct Mailings

Participants indicated that the agency provides numerous mailings, including an annual report, a monthly newsletter, an annual report at a glance, along with numerous solicitations throughout the year. All participants indicated that they believed the direct mailings give donors up-to-date information concerning the agency. Participant 3 stated:

> Our annual report is very informative. We not only provide financial transparency; we report our graduation and retention rates along with updates on the students we are assisting. I think our annual report is a great informational resource for people who want to know about our agency.

Participant 2 indicated that the agency is a 4-star charity, which is a very hard rating to receive.

Theme 5: Volunteerism

Responses from participants indicated that the agency actively promotes volunteerism among donors and community members. The participants indicated that the agency has a high level of volunteerism among community members and business leaders. A document review confirmed that the agency provides mentorship to students through community volunteers.

Table 5

Theme: Volunteerism

Subtheme	Key words/phrases
Mentorship program	We have our mentoring program
	Mentorship program makes a difference
	Bi-annual event supports mentoring
Scholarships	1800 scholarship recipients
	$4 million in annual scholarships
	Our work extends through our scholarships
	Increased awareness due scholarships
Volunteers	Involving donors in volunteer work
	Recipients matched with volunteers
	Promote community involvement

Mentorship Program

Participants reported the agency's bi-annual event is primarily to solicit mentors for scholarship recipients. A review of the organizational documents indicated the agency has over 1,800 volunteers serving as mentors for students. Participants described the bi-annual event that is held to solicit mentors for the students the agency serves. Participant 3 stated, "Our scholarship program is over ten years old, and each one of our 1,800 recipients are matched with a mentor in the community." Participant 1 responded, "The largest way for donors to get involved is to be a mentor for our college students."

Participant 4 stated, “We have mentorship programs and I think we are able to be very specific about how engaging community volunteers to mentor can make a difference in the mentoring individuals as well as the students.” Participant 1 stated, “Our mentorship program not only makes a difference in the students, but it also makes a difference in the mentors as well.”

Scholarships

Participants indicated that the awarding of scholarships to high school students in the community is the major thrust of the organization. Organizational documents confirmed the agency’s use of scholarships to students in the community. A review of organizational documents indicated that the organization had provided over 4 million dollars in scholarships the previous year.

Volunteers

Participants reported not only does the agency involve donors in volunteer work, but there are also multiple other ways the agency promotes community involvement. Participant 3 stated, “We have a professional advisory council of lawyers, accountants, and attorneys that participate on a voluntary basis.” We also have a volunteer small emerging leaders’ group. For people in the community to participate, we have our 50 people forward.” Participant 1 stated, “There are numerous ways for people to participate without giving money.” Leaders and staff have developed community partnerships in order to promote community involvement with the agency.

Summary

The findings of this study indicated that staff and leaders of the agency used various strategies to manage relationships with their donors. The agency's staff and leaders provide engagement opportunities to build and maintain business, personal, and community relationships. Through the use of phone calls, direct mailings, emails, agency events, and social media, the agency is able to maintain constant communication with donors and potential donors. The results of this study indicated that the agency's use of sustained engagement with donors may contribute to the retention of their donors. The community that the agency serves plays a vital role in the organization–donor relationship.

The agency enlists volunteers within the community to provide mentorship and scholarships to students. The agency is involved in community partnerships with businesses in the community. The staff and leaders of the agency promote the donor relationship by ensuring the community members and donors are informed about the agency's activities and the impact of the agency's services on the community. The partner organization in this study has built trust with the community and donors by being involved and invested in the community. The agency has maintained quality relationships with donors by establishing constant communication, openness, engagement, and volunteerism. The following chapter will provide a detailed interpretation of the findings, the limitations of the study, recommendations, conclusions, and implications for social change.

Chapter 5: Discussion, Conclusions, and Recommendations

Introduction

The purpose of this qualitative case study was to explore donor management strategies that leaders of a nonprofit organization use to retain donors. To address the study's research question, I used qualitative data collected from multiple sources of evidence, including interviews and a review of organizational documents (Jentoft & Olsen, 2019). Data sources were triangulated to establish the data analysis's trustworthiness (Marshall & Rossman, 2016). I gathered data that reflected the participants' perceptions on donor relationship strategies used by the leaders and staff of the partner organization in this study. Document analysis was conducted to corroborate or invalidate evidence collected from interview responses. A thematic analysis of semistructured interviews and organizational documents indicated the following themes: (a) cultivation of multiple relationships, (b) communication outreach, (c) sustained engagement, (d) transparency, and (e) volunteerism. Results indicated that the agency's use of these practices contributed to donor retention for the organization.

Interpretation of Findings

The findings from this study were consistent with what previous researchers had identified as strategies nonprofit leaders can use to build relationships with donors (Bradley, 2015; Drollinger, 2018; Harrison, 2018; Katz, 2018; Khodakarmi et al., 2015; McKeever, 2016; Taylor & Miller-Stevens, 2018). I compare each of the five emergent themes with concepts from the extant literature presented in Chapter 2.

Cultivation of Multiple Relationships

Findings from this study indicated the agency staff and leaders sustain the agency's donor base by developing various types of relationships including business, personal, community, and agency. Previous research indicated that donors' motivation influences how much they donate and to which organization (Taylor & Miller-Stevens, 2018). According to Taylor and Miller-Stevens, donors may be influenced by personal identity with the organization, connection to the cause, or trust in the nonprofit organization. Study results indicate that the agency's staff and leaders of the agency's cultivation of different types of relationships may be based on the donor's motivation to give.

Participants indicated that the agency's leaders were able to forge relationships through reaching out to the community. The agency has multiple business relationships with the public school system and community colleges in the region. Many of the members of the agency's board of directors are affluent businesspeople who reside in the community. Board members leverage personal relationships to support fundraising activities. The agency has been serving clients for more than 50 years and has established relationships with multiple philanthropic organizations. Participants indicated that many of the agency's activities are designed to develop long-term relationships with current and potential donors.

Communication Outreach

According to McKeever et al. (2016), organizations should implement communication strategies to retain support from donors. Findings from this study indicated the staff and leaders of the agency use multiple forums in their communication outreach to donors. Participant 1 emphasized the need to have constant communication with donors to ensure the lines of communication are open. Other researchers have documented the importance of using communication to manage relationships with donors (Drollinger, 2018; Khodakarami et al., 2015). Participants' responses indicated that the agency uses two-way communication to inform donors of the agency's activities and listen to what the donors have to say. Drollinger (2018) suggested that active listening is a strategy nonprofit leaders can use to build relationships with donors. Participants indicated that donors receive multiple phone calls throughout the year. Leaders and staff of the agency use phone calls to find out the needs of the donors, to ensure the agency is meeting the donors' needs, and to inform donors of the agency's activities. Participant 4 emphasized the need for the leaders and staff to keep donors informed about the agency and its activities.

Sustained Engagement

Findings from the current study indicate that the staff and leaders of the agency believe engagement with donors is critical to organization–donor relationships. Participant 1 asserted that the quality of the relationship with donors is largely based on the level of engagement with that donor. Previous research conducted by Sargent and Farthing (2016) indicated that organizations should foster interaction with their donors. The agency used appeal communication such as telephone calls, emails, invitations to events, and direct mailings to engage donors. Sargent and Farthing suggested that donors who received multiple types of engagement with the organization expressed higher levels of commitment to the organization.

The organization in this study facilitates widespread engagement with donors by hosting two annual events. Participants indicated the events not only assist in increasing donations, but the events also offer an opportunity for donors and potential donors to gain a better understanding of the services the agency provides to clients. In addition, donors can engage with clients. The marketing department provides support by engaging donors through emails and social media. The agency uses social media to tell students' stories and to promote community involvement.

Transparency

Findings from this study indicated that the agency provides information concerning the agency activities, donor support impact, and statistical data on client services. The agency uses multiple vehicles to inform donors and the community. According to Storie (2017), an organization's desire to share internal information with donors contributes to a more symmetrical relationship. Extant literature confirms that organizations should provide access to organizational information to develop and maintain relationships with donors (Drake, 2015; Ruggiano et al., 2015). Participants' responses indicated the agency uses social media platforms, direct mailings, and student stories to inform the community and donors. Participant 4 emphasized the need to provide accurate information and keep donors in the loop about the agency. One of the ways the agency promotes transparency is through a biannual direct mailing to each donor. Donors are provided with up-to-date information on the agency's activities and clients. The organization’s annual report is mailed to all donors and is available on the agency’s website. The agency has an advising team that promotes transparency by going to community events with information about the agency’s activities and answering questions concerning the agency.

Volunteerism

Harrison et al. (2017) concluded that organizational volunteers report feelings of being connected with the organization’s work. Findings from this study indicate the agency’s use of volunteers is a primary vehicle for client services. Document analysis indicated the agency has over 1,800 volunteers who assist with mentoring students. Staff and leaders of the agency actively promote community involvement through volunteer opportunities. Businesspeople, retirees, and alumni actively engage in mentoring college-bound students. The agency has volunteers who assist adult learners in pursuing or returning to college. Volunteers assist students and adult learners in financial aid counseling and counseling in student debt and repayment options. Participant 4 indicated that the agency understands not everyone is able to provide a financial donation.

Theoretical Framework and Interpretations

The findings of this single case study confirmed the current knowledge on relationship management. In this section, I present and review the study’s findings in the context of the theoretical framework. A comparison of the five dimensions of relationship management will be compared to the resulting themes indicated in the data analysis.

Trust

Findings from this study indicated the partner organization had built trust with donors and the community through sustained engagement and constant communication. Participants indicated that various types of meetings are often held with donors, along with multiple events throughout the year to ensure staff and leaders are "keeping open the lines of communication with donors." In addition, direct mailings are sent to donors periodically during the year. Participants indicated that agency staff and leaders are deliberate in returning every phone call and email received from donors and community members. One participant emphasized the need to always be honest with donors about the agency's challenges and successes. The findings suggest that over time donors have come to trust the organization "to do what they say they are going to do."

Commitment

Findings from this study were consistent with what previous researchers had identified as antecedents that foster commitment (Ledingham & Bruning, 1998). The partner organization has fostered interaction with their donors the appeal communications. The agency has used multiple types of communications to engage donors. Participants expressed a high level of engagement with donors through emails, phone calls, and invitations to agency events. Documents provided by the agency indicated that the agency has been serving the community for over fifty years. Ledingham et al. (1997) defined commitment as the organization's long-term commitment to the community it serves. In addition, the results indicated that the agency had developed partnerships with multiple agencies within the community.

Involvement

The findings of this study indicated that the partner organization is very involved in the welfare of the community it serves. Additionally, the study results indicated that the partner organization makes known their involvement in the community. Participants expressed the transparency of the agency and an emphasis on keeping donors and community members aware of the agency's activities. The agency uses all social media platforms to educate and inform donors and community members of relevant information concerning the organization and the clients they serve. Student stories are a primary vehicle in which the agency "shows how donor support impacts students." The agency also conducts multiple mailings to provide accurate information on graduation rates, financial resources of the agency, the number of students served, and other facets of the organization. The agency serves students and young adults in the immediate and surrounding area in which the organization is located.

The agency has partnered with the local school system to assist underprivileged students with college access. Researchers have suggested that when donors are aware of the organization's involvement in the community, it will generate loyalty towards that organization (Ledingham & Bruning, 1998). Similar to previous research (Harrison et al., 2017), the partner organization in this study uses advisors, who "go out into the community promote the agency's work and to engage students and families." The agency involves the community by soliciting volunteers for their mentoring program. The agency currently has over 1,800 community volunteers. Harrison et al. (2017) suggested when volunteers are involved with the organization, they report feeling connected to the organization's work.

Investment

Ledingham and Bruning (1998b) found that organizations that invest in the community tend to report a higher level of relationship quality with donors. The study findings indicated that the agency provides scholarships to students in the community on an annual basis. Organizational documents indicated that the agency provided over 4 million dollars in scholarships during the 2020 year. The agency investment in the community also extends to adult learners and assists them in advising and post-secondary educational needs. These findings are consistent with research on building relationships with donors (as cited in Handriana et al., 2015). The authors reported that organizations build relationships with donors by investing time, effort, and resources into the community in which they serve.

Openness

Drake (2015) suggested openness is a form of transparency in which the organization goes beyond legal requirements to address relational expectations. Findings from this study indicated the agency is very transparent with donors and community members. Participants indicated that the agency attempts to "provide accurate to the community and donors." Multiple solicitation letters are mailed to donors throughout the year. In addition, the agency has a "very robust social media presence." Ruggiano et al. (2015) suggested that openness in a relationship between an organization and its donors is critical to the relationship. Email communication is another vehicle the agency uses to keep donors, and community members informed about the agency's work. The study findings indicated that communication and engagement with donors are primary attributes in the organization–donor relationship. Through the vehicles, the agency is able to listen to the donors and address the donor's needs. The findings in this study are consistent with Ledingham et al. (1997) definition of openness an organization's willingness to be open when communicating with the donor.

Limitations

A limitation of the study was the sample size associated with a single case study design. While I anticipated a sample size of 10–12 participants, due to the global COVID-19 health crisis, the agency was forced to downsize employees. At the time of the study, only four leaders and staff were available for participation in this study. The goal of this study was to produce varied perspectives unique to one nonprofit organization in Northern Ohio. Despite the small sample size, I selected participants that would yield the most relevant and plentiful data concerning donor management strategies within the organization. As such, data saturation was achieved. My intent of this study was to describe the strategies used by the partner organization. Therefore, it was not expected that the results would transfer to other types of nonprofit organizations.

An additional limitation of the study was the data from semi-structured interviews, and organizational documents would yield data that only reflected the circumstances of one organization, thereby further limiting the transferability of the results across the general nonprofit sector. Results of this study may provide useful information to other nonprofit organizations in understanding the impact of donor management practices on donor retention. Nonprofit leaders may use the findings of this study to develop strategies that may contribute to the management of their donor relationships.

Recommendations

The purpose of this qualitative single case study was to explore the strategies a nonprofit organization uses to manage relationships with its donors. In this exploratory study, I identified specific attributes of relationship management used by a single nonprofit organization in Northern Ohio. The findings of this study may contribute to knowledge on what donor management strategies contribute to donor retention in the context of a nonprofit organization. Recommendations for future research are based on the strengths, limitations, and literature that was reviewed in Chapter 2. My review of the literature indicated that there is limited knowledge on the specific processes by which nonprofit leaders and staff manage donor relationships (Barra et al., 2018; Feng, 2014; Sargeant & Farthing, 2016).

Future research should consider an examination of donor management processes on a larger scale. Further studies should involve a broader selection of participants from varying organizations and geographical locations. While much of the relationship management literature has focused on the donor's perception of the quality of the relationship (Bentley, 2014; Ruggiano et al., 2015), researchers should further explore nonprofit donors' perceptions of the strategies a nonprofit agency uses to manage the relationship. Nonprofit donors may add a unique perspective to how donor management contributes to donor retention. Lastly, future research exploring donor engagement processes may contribute to the knowledge on donor relationship management.

Implications

Social Change Implications

Nonprofits depend on continued financial support to achieve their organizational mission. Many communities with large vulnerable populations risk losing needed services when nonprofits are unable to obtain funding. Existing literature has found that the quality of the organization–donor relationship may predict donating behavior (Bentley, 2014). Findings from this study may provide staff and leaders of a nonprofit organization with practical strategies to cultivate and maintain quality relationships with donors. The findings from this study may contribute to social change by assisting nonprofit leaders in creating strategies that may assist in the retention of their current donor base and contribute to financial viability, thereby enabling the organization to continue providing services to the underrepresented populations they serve. Nonprofit organizations play an essential role in social change. The delivery of services and volunteer involvement contribute to an increase in services to underfunded communities and populations. Many nonprofit organizations operate in a specific geographical community.

The ability of leaders and staff of nonprofit organizations to maintain quality relationships with donors as well as community members may enable the organization to provide additional services to the community in which they serve. The findings of this study indicated that the agency had developed long-term relationships with community members, business leaders, and agency contacts. Social change involves all of society. Agencies that develop and cultivate multiple types of relationships may be better equipped to develop creative activities and programs that complement the need of the community in which the agency operates. Nonprofit organizations rely on support from donors. Without sustained donations, nonprofit organizations may be unable to provide needed services to communities (Faulkner et al., 2016).

Theoretical Implications

The findings of this study are consistent with Ledingham and Bruning's (1998) five dimensions of relationship management. The partner organization has established long-term relationships with donors based on: (a) trust, (b) commitment, (c) involvement, (d) investment, and (e) openness. The agency's leaders and staff utilize multiple engagements with donors as a means to establish quality relationships (Sargeant & Farthing, 2016). The agency's leaders and staff provide opportunities for donors and the community to become involved with the organization via events, community outreach, and multiple media platforms. The findings from this study inform both theory and nonprofit donor communication. Study results generated numerous insights into the actual processes that can be used to build trust, commitment, involvement, investment, and openness with donors. The findings of this study may inform future research that could possibly lead to best practices for donor relationship management.

Practical Implications

Given the importance of donor relationship management in nonprofit organizations, nonprofit leaders may better understand the implications associated with quality donor relationships. Research has indicated that poor management of donor relationships is a problem that leads to donor attrition (Beldad et al., 2015). The findings of this study may assist nonprofit leaders in developing strategies that may assist in developing quality relationships with donors. Building a strong donor base may increase the financial stability of the nonprofit organization, allowing nonprofit leaders to focus on direct services that enable positive social outcomes.

Conclusion

In the nonprofit sector, the management of donor relationships is critical to developing strong relationships with donors (Barra et al., 2018). However, understanding how to manage donor relationships remains a challenge for many nonprofit leaders, particularly leaders of community-based college access organizations (Beldad et al., 2014; Ramanath, 2016). This study explored donor management strategies at a community-based, education nonprofit agency used to retain donors. The partner organization is located in a metropolitan city in Northern Ohio. The agency is a college access nonprofit, that supports area students in the college application process, financial aid, and mentoring services. The agency has sustained long-term relationships with over half of its donor base. The goal of this study was to explore the process the organization uses to develop long-term relationships with its donors.

Participants’ interview responses indicated that the agency uses multiple vehicles to build and cultivate donor relationships. A consensus among study participants was the fact that constant engagement and communication with donors were paramount in the retention of donors. In addition, participants’ responses indicated that partnering with community members and businesses helped to establish a relationship of transparency and integrity, which made it easier for the agency to gain support.

Study findings confirm that the partner organization uses Relationship Management Theory's five dimensions to develop long-term relationships with donors. Nonprofit organizations may build quality relationships with donors by gaining donors' trust, being committed to the community they serve, being involved in the community they serve, investing in the community they serve, and being open about agency activities.

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Appendix A: Participant Invitation Flyers

Research Participants Needed

Purpose of Study: To explore donor management strategies used to retain donors.

Volunteers are needed to participant in a research study being conducted at this facility.

To Qualify You Must

- Have at least 2 years of employment with the agency
- Have in-depth knowledge about fundraising activities within the agency
- Have experience with donor management strategies within the agency
- Have knowledge about current donor retention efforts within the agency

The information you provided may be helpful in understanding how nonprofit organizations can best develop and maintain long-term relationships with donors in an effort to increase donor retention rates.

The information you provide in this study will be strictly confidential and only used for the purpose of the study. This research project is part of a dissertation study conducted by Laytona Butler, a Walden University doctoral candidate.

Interviews will be conducted via telephone. Interviews will take approximately 1 hours of your time.

If you are interested in participating, please contact the researcher at phone: (xxx-xxx-xxx) or researcher@waldenu.edu

Appendix B: Letter of Cooperation

Date:
To Whom It May Concern:

As the director the partner organization, I give permission for the researcher to conduct a study entitled: Understanding the Role of Relationship Management Theory in Fundraising. As part of this study, I authorize the researcher to recruit leaders and staff who are currently involved with the fundraising activities of this organization and review organizational documentation.

I agree to allow the researcher to post flyers within the building. It is my understanding that participants will be assigned a pseudonym to protect their identity as well as maintain the privacy of the organization.

Individual participation in this research will be voluntary and at their own discretion. If requested, the partner organization will receive an electronic copy of the study when complete. We understand that our organization's responsibilities include providing access to speak with leaders and staffs and permission to conduct interviews on the organization's property.

I give permission for the researcher to review company documents to include but not limited to annual reports, press releases, internal memos, donor marketing plans, and donor solicitation letters. I will authorize an individual within the organization to assist the researcher in gaining access to the company documents. I understand that the researcher will be reviewing company documents to determine what strategies are used to establish and maintain relationships with donors

We reserve the right to withdraw from the study at any time. I confirm that I am authorized to approve research in this setting and that this plan complies with the organization's policies. I understand that the data collected will remain entirely confidential and may not be provided to anyone outside of the student's supervising faculty/staff without permission from the Walden University IRB.

Sincerely,
Name of authorizing agent

Cc
Walden University IRB: IRB@waldenu.edu
Researcher:

Appendix C: Interview Guide

Step	Action	Script
General introduction	Introduction of the student and the study	Thank you for meeting me today. I am a student at Walden University, pursuing a doctoral degree in public administration. Thank you for participating in my examination of donor management practices within a nonprofit organization. This interview will be recorded to ensure I capture all your responses correctly. After I transcribe your responses, I will email you a copy to review for accuracy. You may provide additional input at that time. There are no right or wrong answers. Please feel free to respond to questions as you see fit. Your answer will be confidential.
Consent Form	Assure the consent forms are signed	Do you have any additional questions about this process? Do you have any questions about the informed consent form you signed?
Interview Process	Explain the interview process	In this interview, I will ask you nine open-ended questions concerning donor relationship management strategies the organization uses to retain donors. Remember to answer in your own words. You may add more information if you believe it is relevant. I will also ask additional questions if necessary. The interview will be recorded for easier transcription and I will also take notes. You and the organization will not be named in the study, and all information that you share with me will remain confidential. The interview will take approximately 30 minutes
Interview questions	Ask the following interview questions	1. How does the organization develop and maintain relationships with donors? 2. How does the organization promote donor retention? 3. What determines the quality of a relationship with donors? 4. What constitutes an effective relationship with donors? 5. How does the organization define donor loyalty? 6. How does the organization define donor trust? 7. How does the organization define donor commitment? 8. What strategies does the organization use to promote donor retention? 9. Is there any additional information you would like to share concerning the agency's relationship with its

		donors?
Member checking	Explain the member checking process	Again, I will email you a copy of my interpretation of your interview responses. Please feel free to inform me of any discrepancies in the transcription. I want to ensure you responses were accurately interpreted.
Wrap up	Close and thank the participants	The interview is finish. Thank you for your time and support. Do you have any questions or comments?

Appendix D: Document Review

Title:
Document date:
Document source:
Description (i.e., content, purpose, and audience):

Author of Document

Organizational Leader:
Staff:
Executive Manager:
Board Member:
Administration:

Appendix E: Confirmation Email

Date:
Re: Request to Participate in a Research Study
Dear

I am a student at Walden University pursuing a Doctorate in Social Work and Human Services, specializing in Public Administration. I have been given permission to contact you from the director of the partner organization. I am conducting a research study on donor management practices within a nonprofit organization. I am conducting telephone interviews with leaders and staffs at the partner organization who are actively engage in the fundraising activities within the organization to gain an understanding of the process by which fundraising staff increase donor retention rates through the management of donor relationships.

Thank you for interest in participating in this study. Congratulations on meeting the eligibility requirements. This email is to confirm your continued interest in participating in the study. You may contact me with any questions. Upon your acceptance of the consent form, I will contact you via telephone you to schedule a date and time to conduct the interview. Interviews will last up to 30 minutes. With your permission, I will audio record the interview**.** As a participant you may ask questions any time during the interview. Upon completion of the interview, I will transcribe your interview responses and email you a copy. You may withdraw from this study at any time without consequence. I look forward to speaking with you soon. Your assistance is greatly appreciated.

Sincerely,

Appendix F: Demographic Questionnaire

1. Please state your gender____
2. How long have you been employed at this agency?__________________
3. What is your position at this organization?__________________________
4. What is your involvement with donor recruitment/retention?___________
5. What is your level of education?__________________________________
6. What amount of experience have you had working with a nonprofit?____

Appendix G: Transcript Review

Date:

Participant:

Thank you once again for participating in this study. As previously discussed, I am attaching my transcription of your interview responses. Please review carefully and note any discrepancies you may find. It is my hope that I accurately described your experiences with the donor management practices within your agency. Please feel free to contact me via telephone or email if you believe my interpretations are not an accurate account of your responses or you have any additional questions. Your participation was greatly appreciated.