

2016

# How Social Media Affects the Annual Fund Revenues of Nonprofit Organizations

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*Walden University*

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# Walden University

College of Social and Behavioral Sciences

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2016

Abstract

How Social Media Affects the Annual Fund Revenues of Nonprofit Organizations

by

Kelley L. Malcolm

MS, Walden University, 2010

BS, Slippery Rock University, 1999

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Public Policy and Administration

Walden University

January 2016

## Abstract

Social media's impact on nonprofit organizations' annual fund revenues has not been widely studied. The purpose of this case study was to examine how one organization used Facebook and Twitter to build and maintain relationships with its constituents and how those relationships affected annual fund revenues. The organization selected was a national voluntary health nonprofit that conducts research on pediatric brain tumors causes and treatments and provides support to families facing a diagnosis. Hon and Grunig's measurements for long-term organization-public relationships and Kelly's theory of fundraising were the conceptual basis for this study. Data were collected through interviews with employees and constituents, organizational social media analytics such as Facebook Insights, and a week of Facebook and Twitter content. Data were coded inductively and analyzed using classical content analysis. Results indicate that although both the organization constituents and employees interviewed saw social media as a valuable tool to communicate information, it was not having a direct, immediate effect on annual fund revenues. Recommendations were that the organization leaders consider expanding to other social media platforms and track constituents with whom they frequently interact to determine if they make a gift or fundraise through an event in the future. The positive social change implications of this study include recommendations to nonprofit leaders to connect with their constituents with the cost-effective tool of social media and to track how it affects direct donations or participation in its fundraising events. An organization that can keep its expenses low as it connects with its constituents could direct more of its annual revenues into its mission.

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## Dedication

I dedicate this study to my parents, Nancy and Gary Ellenberger, who gave me a love of education and the value of hard work. I also dedicate this study to my husband, Chad G. Malcolm, Ed.D., for his encouragement throughout this process.

## Acknowledgments

I would like to acknowledge several individuals who made this study possible. First, I would like to acknowledge my friend and former colleague Robin P. Boettcher for her openness in helping me find an organization to study. I would also like to thank the employees, particularly Mary O. Ratcliffe, and constituents of the Pediatric Brain Tumor Foundation for allowing me to interrupt their daily routines and provide me with the information to complete my research. My thanks to Catherine Whitlock-Balseiro for providing expertise and varying points of view on the data. In addition, I would like to thank my friend Audrey C. Wood for holding me accountable when I was not motivated to keep moving forward.

This study would also have not been possible without the support of my in-laws, Mr. Dennis and Dr. Sandra Malcolm. Their knowledge and understanding of the dissertation process, and the difficulties it can present, made their encouraging words all the more valuable.

Lastly, I would like to thank my dissertation committee member, Dr. Frances Goldman; my reviewer, Dr. Mai Moua; and Dr. Patricia Ripoll for answering my many “pleasantly persistent” questions.

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## Chapter 1: Introduction to the Study

### **Background**

Nonprofit organizations are often searching for ways to connect with donors and to find new donors to help realize their missions. Nonprofit organizations largely depend on external resources from individual donors “to survive, sustain themselves, and develop” (McGee & Donoghue, 2009, p. 367). Yet, the fundraising environment is fierce with the number of organizations increasing at a fast rate in the last several years (Pope, Isely, & Asamoah-Tutu, 2009). At the same time, the number of donors and amounts of donations have been decreasing (Ford & Merchant, 2010). Donations from individuals, as opposed to corporate, foundation, or government gifts, continue to represent the main source from which funds are raised (Knowles & Gomes, 2009; Ko, Gibson, & Kim, 2011). Merchant and Ford (2008) noted that those donations are often smaller amounts.

Recent economic downturns have jeopardized individual donations. It is more important than ever for fundraisers to learn what motivates individual donors. Skarneas and Shabbir (2011) suggested that fundraisers could learn those motivators by focusing on relationship building. Global economic issues make inexpensive and free marketing tools and public-organization relationship building mechanisms, such as social media, attractive options for nonprofit organizations. This is underscored by the fact that acquiring a new donor through traditional acquisition methods, such as direct mail, may cost as much per donor as the amount of the first gift given (Proper, Caboni, Hartley, & Willmer, 2009).

Wilcox (2008) proposed that the Internet could be a cost effective tool to help

organizations reach a wider audience of potential donors. Because the Internet is becoming one of the most popular communication tools, organizations should explore it as means to pursue their missions (Nah, 2009). The Internet allows organizations to have a website and, more recently, to have a presence on commercial social networking sites such as Facebook and Twitter. Yet simply creating a Facebook page, or opening a Twitter account, does not translate into new donors, guarantee repeat donors, or deeper relationships with current constituents (Culnan, McHugh, & Zubillaga, 2010). A social media strategy should include plans to not only lead people to those accounts, but should also encourage them to be active participants on those accounts. Active participation means that an individual likes, shares, or comments on a Facebook posting. It also means that an individual “retweets” or responds to an organization’s original “tweet.” Culnan et al. suggested that when an organization has created successful online relationships, stakeholders could become a champion of the organization. This has the potential to supplement an organization’s overall strategy of increasing the offline activities of supporters which include donating, hosting fundraisers, and volunteering (Levenshus, 2010).

However, nonprofit organizations must be open to social media. Organization employees, board members, and other stakeholders need to understand the potential value of fostering relationships through online tools such as social media sites. They must be willing to invest the time, human resources, and financial resources to develop and implement a strategy. Nonprofit organizations also need to understand how to translate that online activity with current and potential donors into offline activity of making a

monetary contribution.

### **Problem Statement**

Revenue growth in a nonprofit organization largely depends on the relationships that exist between an organization and the public (McGee & Donoghue, 2009; Park & Reber, 2008; Waters, 2008; Waters, 2009a; Weinstein, 2009). Strong organization-public relationships not only help with donor recruitment, but they can also help retain donors (Gallicano, 2009). Relationship building is important. In fact, Waters (2009) stated that the goal of fundraising is not the financial contribution, but rather to create and maintain relationships with current and potential donors. In other words, fundraisers should focus their efforts on the relationship-building process from which financial contributions will come.

With this heightened focus on relationship building, researchers are beginning to study how social media networks, such as Facebook and Twitter, can be used in a relationship building capacity between an organization and its stakeholders (Briones, Kuch, Liu, & Jin, 2011; Lawson, Kleinholz, & Bodle, 2011; Rybalko & Seltzer, 2010; Waters & Jamal, 2011). Even fundraisers who are tasked with a particular type of fundraising that traditionally relied on significant face-to-face interaction with potential donors, such as planned giving, are realizing that technology is changing the way relationships are built and maintained (Sargeant & Hudson, 2011).

However, a gap exists in the research demonstrating whether using social media networks strengthens existing relationships with donors by affecting an organization's annual fund revenues. Even as early as 1999, Hon and Grunig recognized the need for

future research on the effects that the Internet and “other new media” would have on organization-public relationships (p. 39). Because social media is a new phenomenon within the nonprofit sector, it has not been widely researched (Saxton & Wang, 2014). Briones et al. (2011) conducted a case study on the American Red Cross’ use of social media, yet they only interviewed employees of the organization. American Red Cross donors, volunteers, and social media participants were not included in the case study. This was noted to be an opportunity for further study. Hennig-Thurau et al. (2010) also noted that new media, such as social media, has caused a shift in how companies and organizations market themselves. The authors used the metaphor of playing a pinball machine to describe how companies and organizations must now manage customer or stakeholder relationships. Yet they stated that the effects of this new organization-public relationship paradigm required further study. Levenshus (2010) in particular stated the need for future studies to focus on how supporters who engage with the organization online view their relationship with that organization. If a connection between social media relationships and larger or more frequent gifts can be established, it will serve as a signal to nonprofit organizations they should consider dedicating human and financial resources to a strong social media presence.

### **Nature of the study including research questions**

This qualitative study is focused on a mid-sized, national voluntary health organization’s use of social media, specifically Facebook and Twitter, and how relationships maintained through those channels affect annual fund revenues. The research question this study explored was: How do relationships built and maintained

through social media sites, such as Facebook and Twitter, affect an organization's annual fund revenues? A case study is an appropriate design for this project, which sought to contribute to the body of knowledge on a contemporary concept that is an organizational phenomenon (Yin, 2009). Annual fund donors were selected as the population for this case study as "organizations are increasingly realizing the importance of cultivation of annual giving donors" (Waters, 2009b, p. 113). Annual fund donors were also selected because it is likely that those individuals have not given a gift that is at their highest capacity.

### **Purpose of the study**

The purpose of this study was to see how one particular organization used social media to connect with its public and whether social media affected that organization's annual fund revenues. The organization selected for this study was the national headquarters of a voluntary health nonprofit organization located in Asheville, North Carolina. It raises funds to conduct childhood brain tumor research, which affects an estimated 28,000 children in the United States (Pediatric Brain Tumor Foundation, 2014). This organization also provides educational information and scholarships for survivors of pediatric brain tumors. In addition to the national office, there are event committees throughout the United States with potential for developing a chapter network in the near future. This project involved interviews with current donors to this national organization and the staff at the organization who are responsible for social media strategy and content. An employee from the development department and the organization's president and chief executive officer (CEO) were interviewed as well.

Because social media is a relatively new phenomenon, additional studies are necessary to determine what constitutes a successful and effective social media campaign. Having large numbers of fans, friends, or followers is only one part of the equation. The offline actions of those fans, friends, or followers are the other part. Waters, Burnett, Lamm, and Lucas (2009) studied stakeholder engagement through Facebook and concluded that additional case studies were needed to provide information on how other organizations are succeeding or failing at using this particular form of social media. Briones et al. (2011) also concluded after their case study on the American Red Cross that more research was necessary “to determine the true value of online communication” (p. 42).

### **Conceptual framework**

Two conceptual frameworks were used for this study. The first was Hon and Grunig’s (1999) concept for measuring long-term organization-public relationships. This conceptual framework goes beyond previous public relations measurements, which were more focused on determining the effectiveness of a specific public relations campaign in the short term. Through their research, they developed six identifiers of successful relationships to measure the strength of a relationship between an organization and its public. These six identifiers are control mutuality, trust, satisfaction, commitment, exchange relationship, and communal relationship (p. 18). Hon and Grunig believed that having strong public relations “makes an organization more effective” because the direction of the organization is chartered in partnership with the public (p. 9). Hon and Grunig’s guidelines went deeper into examining a true organization-public relationship,

which by nature involves two-way interactions as opposed to one-way interactions. Two-way interactions occur when there is a dialogue between an organization and its public. One-way interactions take place when an organization simply disseminates information without encouraging or soliciting any dialogue from the public.

To develop the measurement strategies, Hon and Grunig (1999) looked to the existing research on interpersonal relationships. Those interpersonal relationship concepts include access to each other; positivity, which are any steps taken by either party to make the relationship “more enjoyable” (p. 14); openness about what both sides are thinking and feeling; assurances of legitimacy; networking to build stronger community alliances; and sharing of tasks (Hon & Grunig, 1999). From there, Hon and Grunig developed four outcomes of successful public-organization relationships:

- Control mutuality or the agreement that one party “has rightful power to influence the other” (p. 19).
- Trust.
- Satisfaction.
- Commitment.

Two additional components, exchange and communal relationships, were identified by Hon and Grunig (1999) to measure the quality of the relationship between the organization and its public. Relationships based on exchange are more obligatory in nature. One party does something for the other because it is their turn. However, in relationships that are communal in nature, one party does something for the other for the greater good as opposed to an expectation of getting something back. This is akin to a

donor who makes a contribution not because he or she will necessarily benefit, but because the contribution will help others. Communal relationships are the more desirable outcome of public relations relationships and are very desirable to nonprofit organizations (Hon & Grunig, 1999). As Hon and Grunig stated, “fundraisers need to cultivate a communal relationship with potential donors before they can ask for money” (p. 22). Communal relationships often indicate a mature organization-public relationship.

Kelly’s (1995) theory of fundraising was the second conceptual framework used in this study. The basis of Kelly’s fundraising theory placed it firmly in the field of public relations. The author described four main fundraising practices: press agency, public information, two-way asymmetrical, and two-way symmetrical (Kelly, 1995). Kelly considers press agency, which focuses on playing on the emotions of a potential donor, the least desirable of the four models. An example of press agency fundraising would be the American Society for the Prevention of Cruelty to Animals (ASPCA) ads showing photos and video of domestic animals suffering from malnutrition and mistreatment against the backdrop of a song with sad lyrics. Kelly considered a fundraising strategy focused on dialogue between the organization and its public, or two-way symmetrical fundraising, the most desirable fundraising practice. The goal with two-way symmetrical fundraising is for the donor to come to agreement with the organization to make a gift through relationship building. This type of fundraising is often practiced with major gift or planned giving donors but rarely with annual fund donors.

Both conceptual frameworks provide a structure to examine whether an organization’s social media practices were in line with existing theories about building

successful, long-term organization-public relationships. Both conceptual frameworks were also the basis for interview questions for this study. Annual fund donors who have interacted with the organization through social media were asked probing questions about what led them to make a donation to the organization, why they took the time to post a response to a question or comment posed by the organization on Facebook or Twitter, and whether they thought the organization was an effective steward of their financial support. Finally, the conceptual frameworks were used to analyze the organization's postings to Facebook and Twitter during a predetermined period.

### **Definition of terms**

*Facebook:* Started in 2004 for college students (Lee, 2012, p. 336), the platform remains a free social networking site for the general public.

*Google analytics:* A tool that allows account holders, some who use the free options and others who pay for additional services, to determine how site visitors get to a particular website (Google, n.d.).

*Instagram:* An application, now owned by Facebook, for smart phones and tablets in which account holders post photos with captions (Hansson, Wrangmo, & Søylen, 2013). Other users can follow and communicate responses to those photos.

*Nonprofit organizations:* Organizations that receive a 501(c)3 designation from the Internal Revenue Service. Funds raised, and any resulting profits, are not distributed to shareholders (McGee & Donoghue, 2009).

*Organization-public relationships:* Ledingham and Bruning (1998) defined an organization-public relationship as one between an organization and its constituents in

which the actions of one can positively or negatively impact the other (p. 62). Hon and Grunig (1999) further defined organization-public relationships as those that occur strategically when “an organization affects a public or a public affects an organization” (p. 12).

*Press agency:* A type of organization marketing or fundraising strategy that capitalizes on a sensational angle and likened to propaganda (Kelly, 1995).

*Public information:* A fundraising strategy that focuses on use of facts and figures as opposed to a more emotional appeal (Kelly, 1998).

*Social media:* A two-way communication technology found on the Internet through which any person is able to share information and make comments to information shared by others (Duncan & Barczyk, 2013). Individuals are able to interact with one another, to interact with for-profit and nonprofit organizations, and to follow celebrities and other newsmakers. Social media includes blogs and micro blogs such as Twitter, video-sharing sites such as YouTube, and Facebook.

*Triologue:* A public relations term used to describe a conversation that begins with a company or organization and a consumer, continuing with other individuals in the consumer’s personal network (Hlavinka & Sullivan, 2011).

*Twitter:* A micro blogging communication tool that limits user generated content to 140 characters or fewer (Rybalko & Seltzer, 2010).

*Two-way asymmetrical:* This fundraising model involves two-way communication between an organization and its stakeholders, but the outcome is that stakeholders act the way the organization wants (Kelly, 1998).

*Two-way symmetrical:* Focused on developing solid relationships with organization donors, this fundraising strategy engages stakeholders collaboratively in charting the future course of the organization (Kelly, 1998). Both parties coming to an understanding, as opposed to one persuading the other, is the desired outcome (Kelly, 1995).

### **Assumptions**

It is assumed a nonprofit organization that uses social media will attract new annual fund donors due to heightened visibility. In the current study, I wanted to determine how that happened. Was a new donor's decision to give simply based on the content posted on social media? Did the decision to make a donation depend upon the type of feeling the donor perceived between these online interactions? Porter, Donthu, MacElroy, and Wydra (2011) suggested that members of an organization's online community tend to have more "favorable attitudes" toward that organization when it provides both knowledge and entertainment as content (p. 91).

### **Scope and Delimitations**

To explore social media use and its effects on annual fund revenues, I selected the national office of a national voluntary health organization. The selected organization has more than 17,000 "likes" on Facebook and more than 1,200 followers on Twitter. Its mission is to fund scientific research to develop better treatments for pediatric brain tumors and ultimately a cure, as well as to provide college scholarships to survivors in an effort "to eliminate the challenges of childhood brain tumors" (Pediatric Brain Tumor Foundation, 2014). Those who interact with this organization are survivors, individuals

who are living with the disease, their caregivers, family members, and friends. Families who have lost a child to implications from a pediatric brain tumor also interact with the organization. This study first examined the organization's use of social media including frequency of posting content, types of content of posted, and the process for responding to questions from the public. Working with the development and communications department, selected donors who regularly respond to postings, or post their own unique content, on either social media outlet were contacted for interviews. Documents, such as any written plans for social media content or advertising, were examined as well.

### **Limitations**

This study was limited by its focus on one type of nonprofit organization, a national voluntary health organization. Another limitation was that the targeted marketing demographic for this organization was in a state of flux. Historically, the targeted demographic skewed towards middle-class white males between the ages of 41 and 65 years with an interest in motorcycles due to the Ride for Kids motorcycle event that began before the organization was actually founded. With the addition of the Starry Night walk event, the demographics have started to shift to include middle-class women between the ages of 25 and 45 years. At the time of this study, women were the majority of the current social media audience. Further studies of different types of nonprofit organizations, such as arts or religious organizations, or those focused on a disease that affects primarily adults, may provide different results. A study focused on an organization that serves only a local or regional area may provide different results as well.

### **Significance of the study**

Nonprofit organizations serve many roles in this country. Not only do they provide services, they have the power to bring previously unidentified concerns to the public forefront either through formal advocacy or less formal public service announcement campaigns (Salamon, 2002). In addition, many nonprofit organizations help to fill a gap in service delivery, or provide a more cost effective way to deliver services (Malloy & Agarwal, 2010). This focus on fiscal efficiency can leave little or no funding available for organization marketing or donor acquisition. This study contributes to the field of public administration as many nonprofit organizations either receive money from the government to carry out some of its services or they have been contracted to deliver services formerly delivered by the government.

The annual fund is noted to be “the building block for all fundraising” (Tempel, 2003, p. 72). Annual fund activities include special events, direct mail, telephone solicitations, and general marketing and public relations activities including social media activity. Unlike other types of annual fund activities, nonprofit organizations in general often lack the financial and/or human resources to devote to fulltime monitoring of social media (Briones et al., 2011; Loudon & Hall, 2011; Waters, 2009b). Organizations considering social media should take time to develop a strategy that is in line with how their largest group of stakeholders uses social media.

Nonprofit organizations also need to recognize how social media may alter the effectiveness of their current marketing and advertising. Traditional public service campaigns may no longer be the most effective method to change a public behavior

(Lancendorfer & Reece, 2010). For example, after analyzing surveys on how individuals access health care information, Hackworth and Kunz (2011) proposed that health care providers should consider allocating some of the marketing funds typically reserved for traditional marketing channels, such as television and radio, be reallocated to investing in a strong social media presence. Waters and Tindall (2011) further stated that nonprofit organizations should use their websites and social media accounts, as well as mainstream or mass media, to communicate current programs or fundraising drives with the public. Finding empirical evidence that shows that a strong social media presence can positively affect a nonprofit organization's bottom line could mean a redirection for an organization's marketing plan.

The potential effect of social media, and the inexpensive nature of it, could mean organizations would have more funds to direct toward programs and services. Engagement of the public in this two-way communication tool could also illuminate new ways for an organization to better serve its constituents. In addition, the potential to build and maintain stronger relationships through the World Wide Web could potentially increase frequency and amount of donations from individuals. Additional funds could also increase an organization's capacity to meet its mission. The potential to broaden an organization's reach, acquire more donors in a cost-effective way, and build relationships with a larger community have implications for social change. An organization operating with greater efficiency could come closer to meeting its mission.

## Summary

Social media use can add cost-effective engagement and relationship building opportunities to a nonprofit organization's existing marketing or fundraising strategy. This study explored how one organization's use of social media affected annual fund revenues by examining content and frequency of topics posted through two specific tools, Facebook and Twitter. Waters (2010) highlighted the need for additional studies to be conducted on social media to examine how nonprofit organizations cultivate relationships in virtual environments. For that reason, in addition to interviews with organization employees who play a role in the organization's social media, this study also examined the perspectives of donors who interacted with the organization through those two tools, as well as how that interaction affected their decision to give or not give.

Following is the literature review that focuses on three main concepts: social media, fundraising theory and practice, and organization-public relationship theory. Chapter 3 describes the design of the study including the criteria for sampling constituents and employees for interviews and analysis techniques. Emerging patterns from the data collection and a review of interview transcripts and any documents are examined in Chapter 4. This study concludes with an examination of the analysis, suggestions for future studies, recommendations for the organization studied, and implications for social change.

## Chapter 2: Literature Review

### **Introduction**

To begin examining how social media as a relationship building tool affected a nonprofit organization's annual fund revenues, it is important to understand the basis for each of those subjects: social media, fundraising, and organization-public relationships. This literature review first examines social media by defining what it is, who uses it and why they use it, the positive and negative implications of using social media, and how nonprofit and for profit organizations are putting it to use. Fundraising is the next topic covered and includes traditional methods and current best practices, explanations of donor motivations, and philosophies. Finally, the concept of organization-public relationships is examined: what constitutes a strong relationship between an organization and its public, how organizations work on those relationships, and the challenges faced in nurturing those relationships. The literature review concludes with a discussion about how these three subject areas work together to provide the structure for this study.

### **Literature Search Strategy**

The literature review began with terms found in Hon and Grunig's (1999) *Guidelines for Measuring Relationships in Public Relations* and in Kelly's (1998) *Effective Fund-raising Management*. Using Walden University's online library, the main database searched was Thoreau. Initial keywords included *nonprofit, fundraising, stewardship, organization-public relations, donors, donor relations, and annual fund*. Keywords such as *social media, social networks, Facebook, and Twitter* were also used. Parameters used in each search were that the articles come from peer-reviewed sources.

Publication dates were not defined in early searches but were eventually limited to articles published beginning in 2008. I used Academic Search Premier and ProQuest Central to conduct additional targeted searches using keyword phrases *nonprofit marketing* and *nonprofits and Facebook*. Given the relatively recent advent of social media, I also opened the search through Thoreau to include dissertations published since 2008. I then used Google Scholar to help track down specifically cited articles when they could not be found through the Walden Library.

It started to become clear that Waters had published many studies on fundraising and stewardship. I then focused my search to obtain all articles published by this researcher, and I began to track down publications cited in Waters' work.

### **Social Media**

Social media is a relatively new communication tool for people to connect with one another, to keep up with latest news and product offerings from for profit and nonprofit organizations, and to follow celebrities and other newsmakers. Bryer and Zavattaro (2011) defined *social media* as “technologies that facilitate social interaction, make possible collaboration, and enable deliberation across stakeholders” (p. 327). Social media is a type of real-time electronic communication that allows interaction between users, whether it is person to person, or an organization to an individual. Individuals can post or blog about what they are experiencing in the moment, whether personal feelings or dissatisfaction with a product, from nearly anywhere in the world with phones or laptops and wireless Internet access (Hennig-Thurau et al., 2010). Beyond that, social media is a “unique” phenomenon because its account holders also make their network

(friends, followers, nonprofit and for-profit businesses) available for public viewing (boyd & Ellison, 2008, p. 211).

Being such a new phenomenon, the study of social media is still in an iterative stage (Taylor, Lewin, & Strutton, 2011, p. 271). The newness of social media means that there are not yet many “theory-driven empirical research” studies about all the ways and reasons people use sites such as Facebook and Twitter (Cheung, Chiu, & Lee, 2011). Nonprofit organizations in general are not taking advantage of all the marketing and public relations tools available on the Internet, including social media (Pope, Isely, & Asamoah-Tutu, 2009). Yet, before going live with social media, it is important that an organization understands who uses social media and the purposes those individuals have for using social media. An organization also should look to other organizations for best practices.

### **Who Uses Social Media and Why?**

Social media sites, such as Facebook and Twitter, have permeated the daily existence of the millions of people who have created an account (boyd & Ellison, 2007). In Lee’s (2012) study on African-American college students’ use of Facebook, it was noted that “one out of every 8 minutes spent online was spent on Facebook” (p. 337). Using data from a 2008 study on the people of Estonia, between the ages of 15 and 74 years, titled “Me. The World. The Media,” Kalmus, Realo, and Siibak (2011) found that older generations and women tended to use the Internet more to find information about a particular topic. Younger people used the Internet more for “social networking, content creation, and entertainment” purposes than those in the older age groups (p. 396). In

addition, particular to behavioral traits, a high score on the Openness to Experience scale seemed to be the best predictor of Internet use. The researchers identified a theme that the more highly educated tend to use the Internet more for work/information than those with less formal education.

Because Facebook was originally created for use by college students, some researchers are beginning to study social media use with that population. Cheung et al. (2011) conducted an online survey to determine why college students use Facebook. They found that the main reason students had and used a Facebook account was to communicate with friends and to know what their friends were doing. Students use Facebook to maintain a virtual as well as physical presence in friends' lives. Papacharissi (2009) found the same factors for using social media when looking at Facebook, LinkedIn, and ASmallWorld social networking sites to see how "architectural features influence iterations of community and identity in Facebook, LinkedIn, and ASmallWorld" (p. 200). As a registered user of those three social networking sites, Papacharissi gathered observations during a 10-month period. Observations included:

- Social networking sites often replicate the in-person networks of an individual.
- Social networking sites allow for continued connections not bound by geography.
- Those using social networking sites are often not using them to meet new people.
- Social media is affecting the boundaries between public and private information.
- The user, to some level, maintains control of how he or she connects with others.

Adding to this research theme are the findings of Lee (2012) who studied Facebook use among African-American college students at a large, historically black

university in Houston, Texas. The purpose of the study was to explore Facebook use of African American college students for frequency and motivation. Additionally, Lee wanted to explore how racial identity and personality traits impacted that use. The specific personality traits studied were those related to self-esteem and trust in others. Students who participated in this survey spent an average of two hours on Facebook per day with the main purpose being “to keep in touch with family and friends” (p. 344). A smaller, secondary purpose of using Facebook was to make new friends. Younger students tended to spend more time on Facebook than older students. Racial identity was shown to effect students’ use of Facebook, as they were most often connecting with other African-American students. Personality traits played less of a role in motivation for Facebook use. The best predictor of how much time a student would spend on Facebook on a regular basis was the amount of time a student spent on the Internet in general (Cheung et al., 2011).

Building off of research on personality traits and internet use, Wilson, Fornasier, and White (2010) also examined the role of personality traits in social network site use. The personality traits used in this study were: openness to experience, conscientiousness, extroversion, agreeableness, neuroticism, and self-esteem (p. 173). Since social network sites are so new, there is not a lot of research in this area. A small pool of 201 participants was selected from an Australian university. Participants needed to have a social network site page, and were between the ages of 17 and 24. Results from the study found that personality traits did not have the same impact on social network site use. Lee (2012) and Wilson et al. (2010) studies are the few to examine personality traits’ role in predicting

amount of time spent on a social network site. Both are limited by small sample size. In addition, Wilson, et al. (2010) only included people in a particular age range and geographic location. This made it necessary to search for additional studies focused on other populations' social media use.

One example of a study that included a wider population scope is Hackworth and Kunz' (2011) examination of the different types of social media against the backdrop of health care. Using data collected by a 2011 Harris Interactive study, they noted that adult patients in developed nations such as the United States, France, Japan, and Germany, were "responsive" to the use of social media by health care providers (p. 10). Citing another survey by Harris Interactive, Hackworth, and Kunz (2011) noted that 80% of adults in the United States searched online for information about their healthcare concerns. This ties with the findings of Kalmus et al., (2011) who found that older generations use the Internet for information gathering purposes. Social media is a new way for the public to find information.

There are some individuals who use social media as a professional networking tool. In the UK, Loudon and Hall (2010) analyzed results from a 2010 survey of university librarians, and found that a majority of the population surveyed viewed Twitter as a valuable professional tool. Respondents to the survey noted that the short nature of tweets makes Twitter a valuable tool to quickly scan posted information for points that pertain to the daily nature of their work. However, it was also noted that there seems to be a barrier to frequent Twitter use among the student population with which Facebook was more popular. The short character limit of 140 characters is noted as one of Twitter's

limitations. Also, the celebrity component has given Twitter a reputation as a tool that is only good for communicating trivial information.

Individuals use Facebook and Twitter in different ways. Facebook is used more for connecting with existing friends and family, and Twitter is used more for following celebrities or as a professional networking tool. There are also some generational differences with individual's social media use with older generations using social media as a means of gathering information. It is likely that organizations use different types of social media in different ways to connect with the different factions of their publics.

### **How do organizations use social media?**

Organizations use social media to achieve many goals including attracting new customers/donors, advertising events or promotions, and relationship building. Social media can be a valuable tool, in addition to traditional mass media such as television, to help keep supporters of an organization informed about progress towards its mission and current needs (Waters & Tindall, 2011). For-profit businesses use social media to share special deals with their social media followers. This communication tool also allows the public to be in direct contact with a nonprofit or for-profit organization.

One way that organizations use social media is as a platform to increase the frequency and depth of communication with stakeholders. Porter, Donthu, MacElroy, and Wydra (2011) conducted a mixed methods study to develop a framework to help companies develop a social media strategy with the goal of creating "trialogue." Trialogue is communication between a firm, its customers and between customers (p. 80). Sixty different companies' social media presence was examined over 6 years. Data

was gathered by surveying 650 members who were part of a company's social media community. For the next phase of the study, the researchers selected eight different companies that they determined were effective at creating an effective virtual community. Both phases allowed the researchers to develop a framework of recommendations for companies seeking to develop or enhance their social media presence. Trialogue is created by encouraging those who follow a business' social media to provide content, connect with one another, and assist in creating an enjoyable experience. Creating this trialogue helps to foster trust between the consumer and the firm. Porter et al. (2011) suggested that a company work to create this trialogue by working to understand consumer needs and motivations, promoting participation of members, and motivating cooperation between members.

However, trialogue can be difficult to construct thru a Facebook page or Twitter feed. While Porter et al. (2011) stated that "Interaction is at the heart of every virtual community" (p. 87) an organization first has to get stakeholders to use those social networking sites. Lampe, LaRose, Steinfield, and DeMaagd (2011) conducted a case study of the Michigan State University Cooperative Extension's (MSUE) internally created social media page. The purpose of this internally created social media was to collect information from Michigan residents only to fulfill the requirements of their 2010 needs assessment. One of their findings from the study is that an organization needs to implement a campaign to promote its social media presence. Particular to this study, MSUE was challenged in recruiting members of the public to use their site outside of constituents who were already using their services. Social media can be an attractive

marketing, relationship building and information gathering tool for organizations, but the objectives and intended audiences should be clearly outlined. The study further illuminated that an organization needs to find ways to entice users who may connect through phone calls and direct emails to staff members to connect through the social media channels as well.

While creating its own social media site may offer the benefit of controlling the audience to a certain geographic area, many organizations use commercially available social media tools such as Facebook and Twitter. In a study of Fortune 500 companies, Culnan, McHugh, and Zubillaga (2010) found that most of the companies implemented at least one form of social media with the majority having a presence on Twitter. They also noted the need for a company or organization to build a strategy for enticing customers or other stakeholders to engage through the established social media sites. One of the keys to engagement that Culnan et al. (2010) found through their research was making sure to consistently post compelling content. This can be done by providing those who engage with those sites with special opportunities to interact with product development teams or high-level executives. Offering giveaways or hosting contests is another way that organizations can encourage the public to “like” their Facebook page or follow their Twitter feed. One of the simplest recommendations to help increase social media activity was that companies make the social media pages easy to find by giving customers access to their social media sites from the company webpage (Culnan et al., 2010).

Once an organization has successfully driven stakeholders to its social media, those sites can be a valuable public relations tool. However, many organizations are not

taking advantage of all those opportunities offered by social media for two-way interaction (Men & Tsai, 2012). Briones et al. (2011) also discovered this when they conducted 40 interviews with staff at different levels within the American Red Cross. At the time of the study, social media within the American Red Cross was used as a notification tool. There was the hope that someone may respond and engage in dialogue, but the main focus was just reporting out what the local chapter or national office was doing. Bryer and Zavattaro (2011) found this to be true as well with public administration. While social media accounts may be created by various government entities, there is still little evidence of inviting interaction.

This issue is not just unique to organizations and businesses in the United States. Even in a more global analysis, Men and Tsai (2012), in their comparison of United States and Chinese companies' social media, found a lack of true dialogue taking place. While businesses in both countries frequently posted content that showed a desire to be open and transparent, rarely did companies respond to any user-generated content. Simply posting information about new or current products and services misses the mark of having two-way interactions with the public. Even if a question was posed to initiate dialogue, companies were not responding back to the comments posted by the sites' "friends."

Part of this lack of focus on dialogue may stem from the point of view that social media is simply a marketing tool extension. This perspective can cause an organization to miss out on the benefits of two-way interaction. Yet, social media can be layered in with a traditional marketing plan. A study of marketing communications for an Australian

music festival found that incorporating social media might be beneficial in helping to market the event (Hede & Kellett, 2011). In particular, Hede and Kellett (2011) noted that using social media would help with word-of-mouth. Followers or fans could personally recommend the festival through their respective social media accounts. This could help “broaden... attendee base” (p. 999).

Another study that followed Facebook and Twitter accounts for the top full-service and low-cost airlines for 6 months found that airlines were using social media in very traditional marketing ways. The focus of postings to the social media accounts were geared more on advertising or selling as opposed to actual relationship building with customers (Hvass & Munar, 2012). Specifically, the authors looked at the postings in terms of “tone, authority, anonymity, and recipient” (p. 97). Further segmenting to analyze airlines’ use of social media was done based on the number of posts and the number of fans or followers. It was determined that airlines overall were missing the opportunity to capitalize on one of the inherent benefits of social media which is content generated by users. In addition, the links provided for specific posts on special airline fares were not well integrated, taking fans or followers to the airline homepage as opposed to a designated special deal area for social media followers only. Overall recommendations from the study were for airlines to illicit more user-generated content, and to provide transparency about the main poster to the various social media channels.

Those businesses that look at social media as more of an advertising and marketing tool may place ads on various social media channels. Taylor et al. (2011) studied the acceptance level of social network advertising (SNA) by social network site

(SNS) users by conducting a survey with residents in the southwestern United States. Survey respondents were identified by students in two separate marketing courses. Students were guided to provide a particular number of potential participants from varied age groups. Studying different populations' reactions to ads placed on social media is important because a social network site deemed as too commercialized is in danger of losing its members. However, what one person finds intrusive or bothersome on a social network site may not even be noticed by another. The highest-ranking motivation for social media use was entertainment. Taylor et al. (2011) found that if ads placed on a social network site were entertaining or informative, the user was more likely to respond positively to the advertising. In addition, the authors also found no correlation between those who use social media to improve quality of life, or use it at a specific time of day, and their impression of an advertisement while using social media. While this study is limited by geographic constraints as well as the focus on younger respondents, it does provide some important data for social media usage by both for-profit and nonprofit organizations.

Limited additional studies have been published about nonprofit organizations' use of social media. It stands to reason that nonprofit organizations would use social media differently because their marketing goals are different. Instead of simply needing to market to increase a bottom line, nonprofit organizations are marketing to potential clients for their programs and services, and volunteers (Pope, Isely, & Asamoah-Tutu, 2009). With the economic issues of the past several years, many nonprofit organizations are looking for new and cost effective methods to engage with current supporters and

attract potential new donors (Hauswirth, 2010). In addition, the typical public service campaign marketing plan of radio or television public service announcements that are typically aired on donated time may not be the most effective method to promote a program or to change a public behavior (Lancendorfer & Reece, 2010). With those factors in existence, it seems it would make sense that nonprofit organizations explore social media as a relationship building and donor acquisition tool.

One example of a successful social media presence is the Obama 2008 presidential campaign. Though focused on a presidential campaign, Levenshus' (2010) case study on Obama's 2008 presidential run illustrated how the campaign engaged supporters online and transitioned that virtual support to actual offline activities. A campaign, whether fundraising or political, depends on supporters taking action by voting, volunteering, donating, hosting fundraisers, or raising awareness. One way that Obama's 2008 presidential campaign fostered its organization-public relationships was by allowing for open discussion on its social media channels. This was done by not blocking or censoring those who posted an opposing view, but by responding with specific points from the campaign. The campaign social media managers also allowed other members of the social media to respond as well. This openness to differences of opinion was one of the campaign's success factors. According to Hon and Grunig (1999), openness, where both parties feel they can express thoughts and feelings, is one of the components to maintaining strong organization-public relationships (p. 14). This is even more critical with relationships built online which relies solely on dialogue.

One of the main themes to come out of Levenshus' (2010) case study is that the campaign really harnessed the Internet's power to be a feeder system for future offline action and engagement of its supporters. This was the true goal of the campaign: offline action in the form of donating, hosting events, and voting. A lot of the messaging of the online communication during Obama's 2008 campaign was about becoming involved offline at the local level. The focus of the campaign was to empower, dialogue, and build mutually beneficial relationships with the public. This should be the focus of any online campaign or social media presence. This case study showed that the campaign successfully integrated its online presence into offline action by generating an historical amount of donations at smaller amounts, and by empowering its online supporters to assume leadership positions at the local level. Furthermore, it added to the "relationship management theory that says successful public relations efforts result from a focus on building and maintaining mutually beneficial relationships (p. 331)."

To examine how a nonprofit organization uses social media as a relationship building tool, Waters, Burnett, Lamm, and Lucas (2009) analyzed 275 U.S. nonprofit organizations' use of Facebook. The point of the study was to examine "how organizations use Facebook to engage stakeholders and foster relationship growth" (p. 102) by specifically looking at organizations by type based on the Association of Fundraising Professionals categorizations. Those nonprofit organization categories are: arts and humanities, education, healthcare, human services, public/society benefit, and religious (p. 103). The authors noted that organizations want to utilize Facebook, but may lack the financial or human resources to have someone constantly monitor the page.

Using content analysis, the researchers found that most organizations were not using Facebook to its fullest extent. While many organizations were using Facebook as a way to disclose information about the organization, most were not encouraging conversation or posting of unique content from its audience. Based on the findings from this study, the authors suggested that nonprofit organizations devote some thought to implementing more interactive strategies.

In addition to creating a strategy for true interaction, and offline activity, another aspect organizations need to consider when implementing social media is to determine whom or which department will be charged with managing the sites. Those nonprofit organizations that do have a Facebook page tend to give that responsibility to either communications and/or marketing or fundraising departments (Hauswirth, 2010). Deciding who or which department should manage the Facebook page usually reflects the organization's main purpose for having a social media presence. In Hauswirth's (2010) study on nonprofit organizations use of Facebook in the southern part of the United States, she found that "visibility was the overwhelming main reason" for creating a Facebook page (p. 38). This explains why many organizations place the responsibility for managing social media with the communications department as opposed to the development department. While many organizations are looking for inexpensive donor acquisition tools, Hauswirth also found that Facebook was not a replacement for traditional marketing methods, but another added layer to what was already in place. This further explains why fundraising staff members are not often charged with the responsibility of managing social media.

Another part of the strategy behind a social media is determining what outlets make the most sense. Some organizations do tend to use Twitter more than Facebook. According to Loudon and Hall (2011), Twitter, and micro blogging in general, are not well understood despite being “the most interesting” (p. 236). In addition, they cite Twitter as being the stronger social media outlet because it allows for symmetrical and asymmetrical relationships. This is because a “tweet” more closely resembles a conversation starter (Loudon & Hall, 2011). A “tweet” can only contain 140 characters. This brevity makes it easily digestible and easier for followers to respond. Loudon and Hall (2011) focused their study on how librarians use Twitter to connect with patrons and with one another. Using results from a 2010 survey of university librarians in the UK, they found that a majority of the population surveyed viewed Twitter as a valuable professional tool. In particular, study participants noted the character limit of Twitter as a primary benefit of the tool. However, some surveys noted that the perception of Twitter as “trivial” limits their use of it to communicate to library users. Some students also do not use Twitter as much as Facebook, which limits the number of end users. While Loudon and Hall’s study was limited by its geographic location, and the type of organization, it provides some interesting information on the popularity of Facebook as opposed to Twitter.

For-profit and nonprofit organizations use social media in slightly different ways. However, it seems nonprofit organizations particularly are not taking full advantage of this online resource. As Culnan et al. (2010) and Waters et al. (2009) found, many nonprofit and for-profit entities do not invite nor encourage unique postings from their

social media audiences. Other organizations are challenged by the point of view that social media is just an extension of their traditional marketing strategies. Implementing a social media plan is not a foolproof method to extend traditional marketing or engage in relationship building. There are both positive and negative implications to consider.

### **Positive and negative implications**

One of the positive implications of implementing a social media strategy is that an organization or business can enjoy the praise as an individual declares to his or her own network how pleased he or she is with a particular product or service. Conversely, one of the negative implications of implementing a social media strategy is that displeasure can be expressed just as quickly (Hennig-Thurau et al., 2010). Organizations looking to create a social media presence need to be aware of the positive and negative implications so that they can have the strongest presence possible.

For organizations that have the perspective that social media is an extension of marketing, it is a cost effective strategy because there are not any costs to launching a Facebook page or Twitter feed. This is a positive implication as organizations have to make the most of every dollar and a free method of increasing capacity makes it easier to stretch financial resources (Hauswirth, 2010). Social media also offers another channel for organizations to build relationships with their stakeholders (Waters et al., 2009). Hvass and Munar (2012) found that when an organization is transparent about the identity of the person posting content, it results in strong ties between the public and the organization. While this will help to make the postings more conversational in nature, it

also carries the drawback of being difficult to replicate should the main poster leave the organization or be promoted.

Another possible negative implication is an organization assuming a social media strategy will serve as a sure-fire strategy. An “e-relationship” does not necessarily equal a trusting relationship. While previous studies had been done on various components of e-government, Morgeson, VanAmburg, and Mithas (2010) focused their study on the role e-government may play in citizens’ trust. E-government has the potential to improve service delivery and increase citizens' level of trust in government. Morgeson, VanAmburg, and Mithas claim their findings show that while e-government may increase citizen confidence in government in general, it does not necessarily have an impact on trust of government overall. Trust earned in a local government entity through e-government does not necessarily extend to the government in the nation’s capital. One of the most interesting findings from their study is that while increasing confidence in the entity, government in this case, an effective social media presence does not seem to negate a citizen’s negative experience. This study serves as a caution to organizations. Engaging in an e-relationship, whether through social media or through providing services through the Internet, is not a sure-fire way to positively and successfully engage with the public. Different organizations use social media in different ways with different results.

Finding funding to implement social media can also have negative implications. Even though grant funders realize the importance of harnessing social media they are not convinced of the programmatic benefits or that all the online activity actually translates

into offline activity (Perlstein, 2011). Levenshus (2010) noted this as a possible negative implication as well. Not being successful in turning that online enthusiasm into offline action was a barrier to success with previous political campaigns. In addition, it may take financial resources to have offline activities for engagement. Organizations that do not realize that offline engagement takes a strategy and possible financial investment may not realize the full potential of social media as a tool for relationship building.

Another negative implication of social media is that it opens a company or organization to very public criticism. Customers or stakeholders can now give their feedback about an organization's products or services, both in positive and negative ways, and share it with a much wider audience than people they only encounter face-to-face. Letting supporters have a voice in the online channels means that an organization might lose control of its online messaging. However, openness is one of the measurements of a successful organization-public relationship. Culnan et al. (2010) suggested having a plan in place for processing customer comments made through social media.

Adoption of social media as a marketing and relationship building tool has also caused a disruption in traditional marketing methods (Hennig-Thurau et al., 2010). Advertising with television and radio ads, or with nonprofit organization public service announcements, may no longer carry the same weight. These traditional methods may no longer be as effective to reach target audiences with the increasing use of recording television shows and streaming music through various websites (Hennig-Thurau et al., 2010). Social media further complicates the reliance organizations may have on their

websites as a main web presence. According to Bradley (2010) an organization's website is no longer the primary place the public will seek out to retrieve information about an organization. Even if an organization has not engaged in social media, the public can still discuss it, for better or worse, through their own social media accounts. For profit and nonprofit organizations alike are urged to "be where the conversations are" (p. 248).

Before simply setting up accounts on various social media channels, an organization should determine its goals and strategies (Bradley, 2010). As noted in Common Knowledge's (2012) most recent study on nonprofit organizations use of social media, Twitter is not as widely used as Facebook as a means of connecting with the public. It is thought that the 140 character limitation for posting a Tweet on Twitter, and a stigma that it is merely a mechanism to connect with celebrities, are obstacles to more people using it for personal and professional communication (Loudon & Hall, 2011, p. 239). An organization needs to determine what it would like to achieve through social media and which platforms will best help it achieve those goals. To get the most out of social media, organizations need to recognize its relationships with the public will now be built continuously rather than episodically (Waters, 2011). Fans or followers can post content at any time, and are no longer only contacted during a specific fundraising or political campaign. However, relationship building has been a cornerstone of fundraising which is the conceptual framework explored in this study.

### **Fundraising**

At times considered an art, and at others considered a science, fundraising practices have developed over the years largely based on anecdotal and experiential

evidence, rather than empirical evidence (Goering, Connor, Nagelhout, & Steinberg, 2011; Kelly, 1995; Proper et al., 2009). The art and science are balanced by “approaching potential donors with the right appeals at the right time” (Wilcox, 2008). Fundraising is an activity with nuances particular to different audiences and, in some cases, geographic idiosyncrasies (McGee & Donoghue, 2009). It has only been in the last few decades that fundraising has begun to “have a theoretical base grounded in an academic discipline” (Kelly, 1998, p. 124). Proper et al. (2009) found this to be true as well. Since that is the case, this study examines the best practices developed and studied academically to date.

#### **Traditional Methods and Best Practices.**

One of the best practices has to do with framing the request for support in a particular way. This can impact the success not only of a particular campaign, but the long-term success of the organization. Kelly (1995) theorized that there are four main fundraising practices: press agency, public information, two-way asymmetrical, and two-way symmetrical. In her study on the types of practices employed by the six main types of nonprofit organizations as determined by what is now the Association of Fundraising Professionals, she found that all organizations were using the press agency fundraising practice the most. The six main types of nonprofit organizations are arts, culture, and humanities; education; health; human services; public/society benefit; and religion (p. 112). Kelly recommended that organizations take steps towards the two-way symmetrical model as a means to increase donor and public trust.

One way an organization can move away from the press agency fundraising model is by adjusting the tone of its direct mail campaign. Press agency fundraising

focuses on emotional hooks to accrue donations (Kelly, 1998) In a study on direct mail campaigns, the credibility appeal, which is an appeal written and/or signed by a celebrity or community leader, was found to generate the larger donations (Goering et al., 2011). This suggests that the person making the appeal affects donor motivation. The credibility appeal outranked those that played on emotions, or that employed logical use of facts and figures.

Kumru and Vesterlund (2010) conducted a lab experiment to attempt to explain the fundraising best practice of enticing a well-known individual to make a lead gift during a fundraising campaign. This is considered an important first step for a successful campaign. This fundraising best practice, of recruiting a high level donor with the intent of that high level donor reaching into his or her circle of influence to attract other high level donors, has long been used by political campaigns (Wilcox, 2008). Not only does this add credibility to the campaign, it also helps to broaden an organization's base of support. Kumru and Vesterlund (2010) proposed that the success of this practice had more to do with other potential donors wanting to be associated with high status community members. During the lab experiment, Kumru and Vesterlund found that when the randomly assigned high-status individuals made their donation first, the randomly assigned low-status individuals mimicked that behavior by also making a large donation. However, when the low-status person gave first, the high-status person did not give as much. In short, a low-level donor can be motivated by associating with a higher-status donor. This helps to explain the reason this has become a best practice.

However, Faulkner and Kennedy (2008) found contrary evidence in their study on successful direct mail campaigns in Australia. They found that successful direct mail pieces were not only easy to read, they also made use of emotions. Use of celebrity or a high-status individual did not seem to have an effect on the success of campaigns in their study. Framing the request in an emotional way outranked direct mail pieces that focused on logic and worthiness of the organization.

Additional evidence on the importance of framing a request for support comes from Zolner, Compeau, Jones, and Munger (2010). Through their study, they determined that donors seemed to be more inclined to purchase an item of which a portion of the proceeds benefited an organization than to make an outright donation for which they would receive a free gift. This contributes to the theory that the way a request for support is made largely impacts whether or not revenue is generated.

Another way to frame a request for support is the use of nostalgia. Nostalgia can be a powerful motivator for making a charitable contribution (Ford & Merchant, 2008). Nostalgia is a means of mental escape back to what was considered, retrospectively, a better time. (p. 19). It can help to attract new donors and, since many donors give small donations to nonprofit organizations, can help to increase the size of those donations. In an additional study on nostalgia, Ford and Merchant (2010) found that advertisements developed to provoke positive memories can increase an individual's intent to give. Nostalgic appeals seem to have a greater impact on those individuals who are not necessarily prone to nostalgic feelings in general. Knowing donors' propensity for

nostalgia can be difficult to gauge, but can possibly be gathered through surveying stakeholders (Ford & Merchant, 2010).

Another fundraising best practice is to focus on building relationships with donors. Recent studies have shown that fundraising success largely depends on the relationship an organization has with its donors. This is even more crucial as competition for donor dollars remains fierce (Apinunmahakul & Barham, 2012). In addition, according to Waters and Tindall (2011), donors often “like to know the persons within the organization” (p. 22). Taking the time to place a phone call or write a personalized note or email can be a first step in getting to know donors. Starting the relationship in a slow and methodical way can be a good process to begin the relationship between the organization and the donor (Leonhardt, 2011, p. 202). Particular to major gifts and planned giving, in-person meetings are a critical component to building a trusting relationship with a donor (Sargeant & Hudson, 2011).

Knowles and Gomes (2009) underscored this critical component of fundraising with their proposed model for raising major gifts. Their model incorporates relationship-marketing with nonprofit best practices since “for-profit, strategic best practices are not necessarily nonprofit best practices” (p. 386). The model introduced is the AID-TIM model.

- Awareness and understanding.
- Interest and involvement.
- Desire to help.
- Trial gift.

- Info about what and how to give.
- Major gift action.

What sets this model apart from others is the introduction of a trial gift. This trial gift, which would be considered an annual fund gift, can be in the form of special event support or making a general small donation well below the major gift level criteria (p. 398). Although the steps of this model are presented in a linear format, Knowles and Gomes (2009) acknowledge that the process is rarely, if ever, linear. The authors also stress the importance that the last step, major gift action, not be viewed as a final step, but rather a jumping off point for further engagement with the nonprofit.

However, repeat annual gifts and major gifts likely will not occur without the fundraiser understanding what motivates donors. No matter how much time is spent framing the content of direct mail appeal letters, writing hand written notes and placing thank you calls may play a large role in donor motivation.

### **Internal donor motivations**

Understanding fundraising best practices is only one facet of the process. It is also important to appreciate the many facets of donor motivation. Some donors are motivated by internal motives such as a desire to feel good, leave a legacy, or to align with religious or spiritual values. Other donors are motivated by external factors such as group expectations, public recognition, or a desire to elevate his or her social status. Particular to a political campaign, a donor may be motivated by potential benefits for personal or professional reasons, potential social benefits such as the opportunity to interact with

peers with similar concerns or points of view, or because a candidate supports a particular ideology (Wilcox, 2008, p. 3).

Donor motivation impacts major gifts, special events, and direct mail. To study donor motivation impact on direct mail Shen and Tsai (2009), studied donors who responded to a direct mail campaign by donating. They found that those who consistently gave only one time during a year, despite receiving more than one appeal, were more intrinsically motivated to give than their multiple donor counterparts. In other words, these donors were not externally motivated which is why they did not give at another point during the year despite multiple solicitations. Sending multiple solicitations in a calendar year to donors, who have set a pattern of giving only once a year, showing that they are intrinsically motivated to give, was not having any impact on donor behavior. Organizations that notice this pattern would be wise to understand that motivation and seek to preserve the relationship by not sending additional appeals. Nor is it fiscally responsible on the part of the organization to continue to solicit these donors with what can be a costly method of fundraising (Shen & Tsai, 2009).

Adloff (2009) also pulls some interesting information from his synthesis of the literature on motivations for giving. He found that religiosity, social capital, level of education, level of volunteerism, and whether the donor has children or not impacted the decision to make a donation. Additional studies on donor motivation have shown that religiosity is a major factor in donor decision making. Skarmeas and Shabbir (2011) determined, through their study of university students in the United Kingdom, that religiosity is a major contributing factor to inclination to make a charitable contribution.

Those surveyed had made a minimum of three donations to the same charity in a calendar year. Level of religiosity not only was a motivation to give to a non-religious organization, it also affected the donor's view of the relationship with the organization. Ranganathan and Henley (2008) believe this is because the major religions stress the importance of helping others, which translates into favorably viewing charitable organizations. This is an important distinction for fundraisers as, not only is the relationship important, but the level of religiosity can play a significant role in donor motivation as well. It should be noted that religiosity is universal across major religions (Ranganathan & Henley, 2008).

In addition, there are some other donor motivations that lay the groundwork for charitable giving. Ko et al. (2011) suggested that some donors are motivated by an internal desire to either leave a legacy or engage in stronger community connections, is an area for further study. Overall, Adloff (2009) concluded that those who have the social resources to contribute do. Social resources are defined memberships in associations, clubs, or a particular religious community. Social resources may actually outweigh any financial burdens of the donor. Donor motivation may have less to do with altruism and more to do with a combination of other factors. One of these factors is self-construal, which is how the individual views him or herself in the context of others (Skarmeas & Shabbir, 2011). Those with higher self-construal tend to view the quality of a relationship with a nonprofit organization more positively than those with lower self-construal.

Another factor in donor motivation is the size of an individual's in-person social network. An individual with a larger social network may be more motivated to give.

Wiepking and Maas (2009) conducted a study to look for explanations about why individuals with a higher level of social and human resources donate more to nonprofit organizations (p. 1974). Human resources in this study were defined as level of education as well as socioeconomic level. Anecdotal evidence exists to explain the phenomenon, but empirical evidence is lacking. Wiepking and Maas developed the following hypotheses:

- People in a larger social network will be solicited more often for donations by peers within their social networks.
- People with a larger in-person social network than others are more likely part of a social group in which donating to charitable organizations is a normal or expected behavior.
- People who are part of a larger social network are more trusting in general and that trust transfers to trust of charitable organizations.
- People with larger social networks have more empathy for the world at large.
- People with larger social networks have larger cognitive abilities allowing them to think about the needs of others.
- People with higher education have greater financial resources, greater cognitive ability and are more trusting of charitable organizations.

Using data from the later collection of data from the Giving in the Netherlands Panel Study, Wiepking and Maas' first analysis of the results from the study found that people with a larger in-person social network did tend to donate more to nonprofit organizations. Analysis also revealed that the human resource of higher education did result in greater

giving. Particular to education, the researchers concluded that higher education resulted in being more charitable because of greater financial resources, greater verbal ability, and more trust in nonprofit organizations (p. 1988).

### **External donor motivations**

Outside of those internal components there are external conditions that impact donor motivation as well. One of those external conditions is a story reported in the traditional forms of television, radio, and newspapers. These stories can cause cognitive dissonance, which leads to motivation to make a gift. Waters (2009) explains that cognitive dissonance, against the backdrop of Festinger's cognitive dissonance theory, is the feeling an individual has when met with life situations that disagree with his or her views on how things should be. In the face of that theory of discomfort, the individual will want to do something to alter the situation.

To examine this theory, Waters (2009) hypothesized that seeing the media coverage during the 2004 tsunami caused an uncomfortable feeling, cognitive dissonance, on the part of the donor. The only way to restore feeling right was to make a financial contribution to the relief. A survey was conducted with donors to two different American Red Cross chapters in the southeastern United States. Though this study was limited by geography, and that all survey participants were already donors to their respective American Red Cross chapters, it did find that cognitive dissonance was experienced by the participants. In addition, the survey results also found that making a financial contribution helped to restore the donor's level of cognitive balance. The survey's findings underscored the need for organizations to have a plan in place for

communicating their needs through the mass media. While “less effective than face-to-face solicitations and even direct mailings,” communicating in this way can help to generate necessary donations in a short period of time (p. 143). This is often necessary when disaster strikes. Waters (2009) also noted that communicating organizational needs through the mass media helps an organization to reach many potential donors of “modest incomes” who typically account for an organization's base of revenue (p. 143).

In a follow-up study, Waters and Tindall (2011) wanted to determine if donations to an organization in response to a crisis are a result of the media attention given to such a crisis. Was the cognitive dissonance more apparent because of the mass media attention a crisis received? It is a deeply held belief among fundraising practitioners that people give to an organization because of the person who asks, not simply because it is a worthy organization. However, that belief does not seem to hold true when donors give so freely to relief organizations in light of events such as the 2004 tsunami. The purpose of this follow-up study was not only to determine the media's effect on charitable giving to relief organizations in times of crisis, it was also to create a model for crisis fundraising for other organizations. The mass media's coverage of the 2004 tsunami did have an impact on the public's donations according to the results from the study (Waters & Tindall, 2011). What was surprising was that Waters and Tindall noted that the more positive stories had a greater impact on donations than those that only focused on the negative. It seemed that the “desire to see immediate improvements to life quality for those impacted by the crises supersedes one of the fundamental beliefs of fundraising that people primarily give to organizations in their own communities...” (p. 32). This study was

important because it added to previous research examining mass communication of an issue, such as a natural disaster, provided a great deal of motivation to make a financial contribution. Waters and Tindall (2011) further stated that contributions received in response to a crisis provide an opportunity for a nonprofit organization to implement stewardship best practices such as reporting back the impact of donations, and building relationships with donors.

Other external factors that impact donor motivation can include donor benefits offered to donors. Against the backdrop of a university performing arts program, it was found that donor identification with the actual programs offered were the greater predictor of giving more than the recognition or benefits offered (Ko et al., 2011). It should be noted that donors in this case were defined as individuals who made a monetary contribution to the university performing arts program over and above any ticket or subscription purchases. However, one important distinction that came out of this study is that those 55 years of age and older tended to donate more than other age categories. It is thought that this distinction is not only because individuals 55 and older have accumulated enough discretionary income to make larger gifts, but also because these individuals may be more motivated to leave a legacy.

Another donor motivation relates to volunteering. Liu and Aaker (2008) found that asking individuals first about their intent to donate time, before asking them to donate money, would have an effect on the amount of money donated. The study is important as organizations are always trying to encourage people to give. Donating time is associated with feelings of happiness, whereas donating money is viewed in a much

more utilitarian perspective. Liu and Aaker attributed these findings to the different mind-sets that occur when initially asking about time versus initially asking about money. Donating time to a worthy cause, by volunteering to work on a particular task or project, may cause feelings of happiness and of making a difference. Donating money may cause feelings of sacrifice. McCurley and Lynch (2006) also stated that individuals who volunteer with an organization often are more likely to donate money to the organizations for which they volunteer, and tend to donate in higher amounts. Finally, current users of a program are at times motivated to financially support an organization. Leonhardt (2011) suggests that fundraisers include program participants, members, and users of a service in any requests for donations. Based on the findings of Liu and Aaker (2008), volunteers should be included in appeals for financial support as well. Even if an individual is not able to give at the moment, he or she should be considered a future donor.

While donor motivation certainly factors into fundraising success, the most cited reason that an individual gives to an organization is that he or she was asked (Forbes & Zampelli, 2011; Leonhardt, 2011). In their analysis of data gathered from Independent Sector's 2001 Giving and Volunteering Survey, Forbes and Zampelli (2011) noted that attending religious services and having high levels of education impacted whether or not an individual made monetary donations. This is in line with the findings of Adloff (2009), and Skarmeas and Shabbir (2011). Yet, simply being asked resulted in greater probability that an individual would contribute to a nonprofit organization than other indicators.

## **Organization-Public Relationships**

Organization-public relationship is a term used to describe the interactions that occur between for profit or nonprofit entities and customers or stakeholders.

Organization-public relationships can have various starting points, and the reasons for starting the relationship can impact the future of those relationships (Bortree, 2011).

What may begin as a simple exchange relationship can potentially grow into a relationship in which customers become loyal purchasers of products or services. In a nonprofit organization, the relationship can grow to the point in which donors or volunteers become champions of a particular cause. The benefits of strong organization-public relationships can be repeat or increased revenue. Strong organization-public relationships can also mitigate negative consequences during an organizational crisis (Waters & Tindall, 2011b).

### **Cultivation of organization-public relationships**

Sometimes individuals begin a relationship with an organization by volunteering because they need community service hours, or because they want to give back to their communities. However, the relationship does not have to continue to exist based on those same, entry-level reasons. In other words, just because an individual volunteers in an effort to accrue service hours as part of degree completion or to fulfill punishment, a deeper and longer lasting relationship can still be developed. Volunteering as punishment differs from being approached by an organization to freely give of one's time which has been found to provide an individual with feelings of happiness (Liu & Aaker, 2008). Bortree's (2011) study of high school age volunteers found that the reasons for

volunteering could be mediated by organizational efforts to deepen the relationship. Working to find meaningful volunteer tasks that match the volunteer's skills or interests and the organization's needs may lead to longer volunteer tenure, and a long-term organization-public relationship.

Looking at organization-public relationships through a donor lens, Waters (2008) wanted to determine if a strong relationship between the donor and the organization indicated a strong likelihood to give. He also wanted to determine if a strong relationship increased the likelihood of renewing a gift. The significance of this study was that it added to the little empirical evidence that existed to show that strong relationships between an organization and stakeholders had an impact on revenue. The participant group for this study was from a healthcare nonprofit that provided free medical services to uninsured residents of California. Waters developed an electronic survey using Hon and Grunig's (1999) guidelines for measuring public relations effectiveness to determine how individual donors to the health care nonprofit view their relationships with the organization. Both major donors and non-major donors were randomly selected. It should be noted that there were not email addresses for every major donor due to those gifts involving more face-to-face cultivation. Waters found evidence to support his hypothesis that major gift donors would rate the organization higher on the relationship scales than non-major gift donors. Major gift donors tend to receive the most attention from an organization because there are not as many of them as annual fund donors, and they give at much greater dollar amounts. Waters also determined that repeat donors rated the relationship between the organization and themselves as higher than donors who had only

given once. Waters' findings from this study are important because they provide evidence that investments should be made in relationship cultivation particularly with individuals who are regularly giving smaller gifts. Even though the results are limited by the geographic area, and the examination of only one organization, this study adds to the literature on the importance of relationship building's effects on donations.

Looking deeper into the role relationships play in fundraising, Waters (2010) wanted to see if he could predict whether or not a donor would contribute in an organization's recent fundraising campaign based on the donor's evaluation of the organization-public relationship. The predictions were based on donor levels of trust, commitment, satisfaction, and power. In addition, Waters wanted to see if there was a difference between annual fund donors and major gift donors. To analyze this, he used Hon and Grunig's (1999) relationship measures and Kelly's (1998) stewardship strategies. Data was collected by mailing hard copy surveys and a postcard reminder to a random sampling of 4,290 donors from three nonprofit hospitals located in the western United States. One hundred seventeen of those surveys were undeliverable, and 1,706, or 41%, of the remaining 4,173 surveys were completed and returned.

Both the annual fund and major gift donors who completed and returned the survey rated the cultivation strategies of the hospitals effective. From the survey results, Waters (2010) found that those donors who rated the organization highly in terms of trust and satisfaction were the ones more likely to give in a recent campaign. However, Waters also found opportunities for stewardship to be strengthened in terms of offering assurances when a donor voiced a concern. Opportunities to provide assurances should

go beyond words, or “verbal and written assurances,” and should be apparent to donors and the public by changes within the organization (p. 471).

One way an organization can nurture its relationships with the public is by focusing on stewardship. Stewardship is defined as gift acknowledgement, using a gift for the purposes for which it was intended, communicating to the donor how the gift was used, and encouragement for the donor to renew his or her gift (Kelly, 1998). Prompt acknowledgement after a donation has been made is an important relationship building step. Waters (2009b) collected data to look at how an organization's stewardship strategies affected donors. The stewardship strategies studied were reciprocity, responsibility, reporting, and relationship nurturing. One hypothesis for this study by Waters was that major gift donors would rate the cultivation strategies more highly than annual fund donors. Waters’ research question was which relationship cultivation strategies had greater influence in donor's rating of their relationship with the organization.

Data was collected with a mailed survey to a random sample of 800 annual fund and major gift donors of a nonprofit hospital in the Western United States. Completion rate for this survey was high with 70% of selected donors participating. The survey used Hon and Grunig’s (1999) relationship measurement guidelines of trust, satisfaction, commitment, and control mutuality along with the four stewardship strategies. Donors were asked to rate their feelings about those areas along a 9-point scale. Major fund donors rated stewardship strategies higher than annual fund donors, particularly in the area of reciprocity. Using path analysis, the strategies found to have the greatest influence

on how a donor rated the relationship with the organization were all of them except reciprocity. Waters (2009b) noted multiple times that it is more cost effective for an organization to retain donors than to acquire new ones. The results of Waters' study show that donors "appreciated reciprocity, responsibility, reporting, and relationship nurturing" (p. 118). Major gift donors had a greater appreciation for these strategies than annual fund donors.

Gallicano (2009) also conducted a pilot study to determine what strategies may be effective in maintaining positive, effective relationships between a health advocacy organization and its members. One of the ways employees of the organization develop personal relationships with members is by handling members' issues "directly rather than referring members" to someone else within the organization (p. 317). Another way of cultivating the organizational-public relationship is by taking interest in other aspects of members' lives. Through Gallicano's interviews with members and employees, it was revealed that the health advocacy organization had helped to promote a member's recently written book. Further, Gallicano discovered that employees helped members do such things as relocate and receive care after a natural disaster (p. 318). In addition, relationship building not only took place between the organization and its members, but between members as well. Termed "peer linking," the health advocacy organization at various opportunities took steps to make connections within their membership (p. 318). While the results were limited by studying only one organization with a largely homogenous employee base, it did provide a foundation for future studies on proven relationships building strategies.

Another way organizations work on relationship building is by inviting donors to events and special gatherings. Particular to major gifts fundraising, Knowles and Gomes (2009) developed their fundraising model, titled AID-TIM, as more of a relationship building plan. This model focuses on communicating and interacting with potential major-gift donors not only to the point of making a major-gift, but well beyond. They suggest the relationship building steps taken at the beginning of the process, such as inviting a donor to come as a guest to a special event, continue after a major-gift has been given. This can help set a nonprofit organization apart from others as continued involvement can help build a long-term relationship with donors.

Properly thanking donors is also a critical step in the relationship building process. Thank you notes make a difference in retention particularly among less frequent donors (Merchant, Ford, & Sargeant, 2010). Taking the step of sending a thank you note, especially to new donors, can help to “raise the levels of future donation intentions, commitment, and emotional utility” (p. 605). This has implications in the field of nonprofit work because not all donors receive thank you notes. Merchant et al. (2010) noted that future studies should focus on the length of time between making a donation and receiving an acknowledgment, and potential differences between donor responses to an acknowledgment form letter as opposed to a handwritten note.

Cultivating organization-public relationships is an on-going process that does not necessarily have a beginning and an end. To increase the chances of repeat donations, and hopefully increasing those donations, an organization needs to keep in touch with its public. Organizations also need to vary the content or purposes behind keeping in touch

based on Kelly's (1998) stewardship strategies of acknowledgement, proper usage of a gift, communicating proper usage of a gift, and seeking a repeat gift. However, nonprofit and for profit entities both face challenges in consistently and appropriately working organization-public relationships.

### **Challenges in organization-public relationships.**

No matter how well thought out an organization-public relationship strategy is, there are often challenges to successful implementation. Those challenges may be due to employee turn-over, a resistance to using technology to reach a wider audience, or an organizational crisis brought on by an employee or volunteer. Or an organization may simply lack the resources for dedicated relationship management. Yet without a plan to address these challenges, an organization or business may find it is losing donors or customers to its competition.

One challenge facing organizational-public relationships can be the advent of an organizational crisis. Brown and White (2010) examined the best crisis response strategies for an organization. They found that existing positive relationships with the public were most effective in mitigating the effects of the crisis. These pre-existing, positive relationships between an organization and its stakeholders were found to be even more effective than any crisis response strategy. In addition, Brown and White found that a tailored crisis response strategy worked best. In other words, matching the tone of the message to the degree of relationship, positive, negative, and points in-between, were more effective in weakening the damage than a blanket strategy. Matching the tone of the

crisis response message to different shareholder groups was also found to be a successful strategy.

Another challenge facing organization-public relationships is the downtime between campaigns. It is not simply enough to secure a donor or a member. In between a capital campaign, special event, or special fund drive campaign, an organization should work to develop relationships with current and newly acquired donors. Once a donor or member is secured, the real work begins to keep him or her as a donor, member, patron, or customer. Seltzer and Zhang (2010) found that relationship building was important in their study on the relationships between American citizens and their respective political party. Particularly they found that “a combination of both mediated communication, interpersonal communication, and dialogic communication... could prove to be fruitful in relationship building with political constituencies” (p. 39). Based on the findings from their study of registered voters in regards to the 2008 presidential election, Seltzer and Zhang also found that political parties would be remiss in assuming voters were lifetime members. Relationship building can help to ensure voter satisfaction, which can lead to voter retention. Although Seltzer and Zhang’s study focused on members of a political campaign, the findings can also apply to donors or members of a nonprofit organization.

The advent of technology is another challenge to relationship cultivation. Sargeant and Hudson (2011) noted this in particular when they examined the process of securing a planned gift. Their observation of the planning giving program of the Southern Territory of the Salvation Army showed that in-person meetings are important to building a trusting relationship with a donor. This is in spite of the advent of technology, which is

starting to alter the relationship building process between nonprofit organizations and their stakeholders. However, Sargeant and Hudson's observations also found that those considering a planned gift are starting to prefer to gather information online first rather than placing a phone call to an organization. This anonymous way of gathering information diminishes early relationship building opportunities.

Sometimes those within an organization may think the relationship with the public is better than it really is. In another study, Waters (2009a) compared how donors and employees of a nonprofit organization rated the relationship between the organization and the donors. He also wanted to see if either side could accurately predict how the other perceived the organization-public relationship. A survey was mailed to donors and employees of a nonprofit hospital located in Western United States. The survey was developed from Hon and Grunig's (1999) measurement scales for relationships that exist between an organization and the public. Waters found that donors perceived their relationship with the organization to be stronger than the fundraising staff perceived. In terms of predicting how the other side felt, the fundraisers thought the donors overall would rate the relationship to be stronger than it actually was in all categories. This particular study by Waters is important because it underscores the idea that nonprofits can no longer assume donors automatically have complete trust in an organization simply because it is a nonprofit as opposed to for profit. In addition, the study is significant because it shows the importance of measuring organization-public relationships using specific categories. However, this study is limited by its focus on only one organization and on only the annual fund donor.

Another challenge in building strong organization-public relationships is an overestimation of the effectiveness of relationship building strategies by the organization. Waters (2009d) examined how both donors and fundraising practitioners value a nonprofit organization's cultivation strategies derived from the public relations and marketing fields. Then he compared those values with those of the fundraising staff. Using the literature on public relations, relationship marketing, and fundraising the following cultivation strategies were defined: access, positivity, openness, assurances, networking, and sharing of tasks. The research questions Waters posed in this study were how accurately did each side agree on the importance of those strategies, how each side perceived the others valuation of those strategies, and how accurately the predictions matched. Data was gathered through a mailed survey to both annual and major donors to three nonprofit hospitals that are located in the Western United States.

Regarding the first research question, the survey results indicated that both sides agreed that each of the six cultivation strategies were important. However, there were statistical differences in how each side rated openness (donors higher than practitioners). Donors perceived agreement on all but one strategy with fundraisers, which was networking. Fundraisers perceived agreement on all strategies. Lastly, the predictions against actual answers were underestimated by donors and overestimated by fundraisers. What does this all mean? Even though both sides viewed the cultivation strategies positively, there is a danger in the overestimation of fundraisers to what donors want. According to Waters (2009d), this could have a negative effect on the longevity of donors if not addressed. Donors are looking for openness more than any other cultivation

strategy and also are very interested in the sharing of tasks. Donors to these nonprofit hospitals may not be as informed as they could be about the importance of networking or “coalition-building” within the community to benefit the mission of the hospital. Waters recommends these nonprofit hospitals, and other nonprofit organizations, work on communications, mostly one-way, to show the good work of the organization rather than constantly sending fundraising appeals. In general, Waters’ study underscores the need for organizations to invest in relationship cultivation.

For-profit entities also have challenges with building relationships with the public. Using content analysis on 2009 Fortune 100 organizations’ websites, Waters (2011) conducted a study to increase understanding of how public relations can better employ Kelly’s (1998) four components of stewardship (reciprocity, responsibility, reporting, and relationship nurturing) to nurture stakeholder relationships. Additionally Waters examined how the different industries represented in the 2009 Fortune 100 varied in their use of the stewardship strategies. For profit businesses stewardship strategies also include thanking customers for their business and working to ensure repeat business. Waters found that the organizations were employing stewardship strategies on their websites with reporting being the most common element and relationship nurturing being the least common element. Amongst industries, Waters did determine differences in the most prevalent stewardship strategies. For example, those companies focused on manufacturing or natural resources tended to focus more on reporting while retail companies focused more on nurturing. This study was a departure from examining stewardship in an offline, fundraising context. One critique of the 2009 Fortune 100

websites in regards to stewardship is the prevalence of one-way interaction. Placing more of a focus on building a relationship with the public, rather than just reporting the latest product or company news, may help with customer retention.

A final challenge to building and maintaining strong organization-public relationships is a lack of human or financial resources. In his study on how both major gift and annual fund donors to a hospital system viewed its stewardship strategies Waters (2009c) stated that the organization had the financial resources to invest in a fundraising staff. Therefore, the results could not be generalized across the nonprofit sector, which includes organizations of a variety of financial stability. Proper et al. (2009) also noted that larger fundraising staffs typically yield higher fundraising totals. The more individuals that can be dedicated to relationship building, the more likely repeat gifts will occur.

### **Conclusion**

With the increasing competition for donations, nonprofit organizations have to think carefully about ways to retain donors and attract new ones (Zolner et al., 2010). The costs associated with donor acquisition can be a concern to nonprofit organization stakeholders, even though the acquisition process is an opportunity to show how the organization uses funds to realize its mission (Apinunmahakul & Barham, 2012). Waters and Tindall (2011) proposed that mainstream or mass media should not be the only way a nonprofit organization communicates to the public. Use of the Internet, including an organization website and social media accounts, should be incorporated into the communications plan.

If donor acquisition is a concern, could social media possibly be used to retain current donors and attract new ones in a more cost-effective way? Because social media account holders make their connections and interests public (boyd & Ellison, 2007), this can be a great way for a nonprofit organization to capitalize on electronic word-of-mouth promotion.

## Chapter 3: Research Method

### Introduction

The purpose of this study was to determine how one organization's use of social media, specifically Facebook and Twitter, affected an organization's annual fund revenues. A nonprofit organization must maximize financial and human resources to not only work toward meeting the needs of the community, but also to find cost-effective ways to promote the organization in a way that will help it raise the necessary funds to meet its mission. Hon and Grunig's (1999) public-relations guidelines, which was one of the conceptual frameworks used for this study, stressed the importance of two-way interactions as the best way to build organization-public relationships. Social media offers that opportunity for two-way interactions as followers of an organization's Facebook or Twitter accounts have the opportunity to:

- "Like" or "favorite" a post.
- "Share" or "retweet" a post.
- Post something directly to the organization's Facebook page or "tweet" the organization directly.

Kelly (1998) also emphasized the need to focus on two-way symmetrical relationship building in her fundraising theory, which was the second conceptual framework for this study. Two-way symmetrical fundraising practices have usually been more widely practiced with major gift and planned giving prospects or donors. Social media allows donors and stakeholders at any level to engage in conversation with the

organization. This kind of dialogue opens the door for deeper relationships with a wider pool of donors.

To examine how one nonprofit organization's relationship building strategy through social media affected annual fund revenues, I selected a single case study. The single case study design was selected because many nonprofit organizations have a social media presence. Studying one particular organization can help provide insight into "lessons learned" and a representation of donor's perspective (Yin, 2009, p. 48). A single case study design can also reveal organizational practices or components that could serve as a backdrop for other studies. Chapter 3 reviews the qualitative case study design traditions and outlines the case study protocol for the study. In addition, Chapter 3 describes the coding method that was used to analyze the data, and addresses the issues of validity and reliability. To collect data, I interviewed the organization employees responsible for social media, and a minimum of five constituents who interact with the organization through social media. I also examined organizational documents to gain a deeper understanding of its social media goals and processes.

### **Qualitative Design Paradigm**

Qualitative studies explore the meaning that individuals experiencing a certain phenomenon attach to a particular event or process (Creswell, 2009). Study participant meaning outweighs any meaning the researcher attaches to the phenomenon. In addition, study participant meaning outweighs that found in the literature. The qualitative design also focuses on illustrating information on a few cases in depth as opposed to many cases that allow for generalization (O'Sullivan, 2008; Marshall, 1996). Yin (2009) stated that

the case study design is appropriate when the focus is on a contemporary concept within a real-life context (p. 2). The contemporary concept addressed in this study was social media and the real-life context is how it is used in a national voluntary health organization as a relationship-building tool with constituents. Conducting a survey would mean ignoring the context of the organization using social media. This study used the single case study design within the qualitative paradigm.

Waters et al. (2009) have examined relationship building through quantitative methods. Briones et al. (2011) studied social media use at the American Red Cross, but only from the perspective of national and chapter staff. Gathering information from donors was not part of the data collection process. It is important to consider the donor point of view when exploring social media as a relationship-building tool. Otherwise, only one side of the conversation is studied.

### **Role of the researcher**

O'Sullivan (2008) stated that qualitative research studies are often conducted by individuals who are familiar with the phenomenon studied. This perspective often means the qualitative researcher has the knowledge to "conduct a sound qualitative study" (p. 39). As a scholar practitioner, I have had experience in fundraising and social media strategy at the national level of a national voluntary health nonprofit organization. I have been fundraising in the national voluntary health nonprofit arena for more than 12 years. In those 12 years, my fundraising experience has mostly been with special events (walks, galas, golf outings) at both the field and the national level. For 3 of those 12 years, I also had responsibilities for managing a social media presence for a newly created walk event

that launched in several locations throughout the country. During that time, I started asking what all of those “likes” and “follows” on the event’s Facebook and Twitter pages amounted to in terms of revenue.

As I began to think about that question and how I might study the phenomenon, I thought it would make sense to try to study another organization within the national voluntary health arena. These types of organizations center on a particular disease and often have a similar structure. This led to my assumption that in addition to general donations, the organization I would be studying would receive a significant amount of its revenue through special event fundraising and that perhaps a lot of the social media activity would be centered on those events. Having a basic understanding of the internal structure and fundraising culture allowed me to better frame the interview questions and to have the knowledge of the types of documents to review. This was important, as I would be the data collection instrument. As Creswell (2009) stated, “Qualitative researchers collect data themselves through examining documents, observing behavior, or interviewing participants” (p. 175).

There were two possible organizations, both in the national voluntary health arena, which would have provided the access necessary to constituents. One was the organization that I was working with at the time. The other organization was one at which I had an established professional relationship with the organization’s president and CEO. The main benefit to this organization at which I was working would have been the completely open access I would have had to both organization employees and constituents. However, I would also have been more susceptible to bias and the quality of

data collection could have been jeopardized (Creswell, 2007). For this reason, the organization at which I had a pre-existing professional relationship with the president and CEO is the organization that was selected because it would provide better quality data and reduced potential bias.

For case studies in particular, the role of the researcher is to select the case or cases to study, collect information through interviews, observation, and document review, and analyze that information (Yin, 2009). In this case study, the role of the researcher meant working with the organization leadership to select employees within the organization to interview in-person. Determining which documents to review, including any organizational analytics on its social media, and any documents about planned social media postings, were also the role of the researcher. Based on work I had done in a previous role with a national voluntary health organization, I knew that potential documents I might examine would include the Facebook Insights report and perhaps Google analytics.

In addition, as the researcher I worked with the organization to identify constituents with whom to conduct interviews. The employees responsible for the organization's social media identified the individuals who regularly interact through social media. Interaction in this case study meant that a constituent "likes," "shares," or writes their own post on the organization's Facebook page, or "favorites," "retweets," or directly "tweets" on the organization's Twitter account. This ease of access to organization constituents due to the researcher's pre-existing relationship with the president and CEO was a main reason for selecting this organization.

Since this organization is a national organization that hosts fundraising events across the country, the constituents that were identified to interview happened to not be geographically located near the researcher. This meant that in-person interviews were not possible and that the researcher would not be able to observe body language while conducting the interviews. The constituents selected were individuals who frequently interacted with the organization through its Facebook page or Twitter account, but who may or may not financially support the organization. Skype or phone conference lines were options offered to conduct interviews with constituents identified who do not live near the researcher.

### **Research Questions**

The following research question (RQ1) and subquestions (SubQ) were used to examine how social media affected one organization's social media.

- RQ1. How are relationships, built and maintained through social media sites, such as Facebook and Twitter, affecting an organization's annual fund revenues?
- SubQ1. How do donors who interact with the organization through social media sites feel about their access to the organization's current awareness and fundraising campaigns or current research initiatives?
- SubQ2. What, if any, benefits do donors personally feel they get from following this organization's social media?

SubQ3. In what ways have donor interactions with the organization through social media influenced the decision to give as well as the level of the gift?

### **Procedures**

Yin (2009) suggested that there are three principles of data collection that will help a study establish its reliability and that interviews are considered an essential source of data for case studies. The first principle is to use multiple sources of data. Next, Yin suggested the researcher have a case study database to store all collected information. Lastly, maintaining a chain of evidence can help the audience to follow the researcher's process from data collection, to data analysis, to the development of conclusions.

Per Yin's (2009) suggestion, multiple types of data were collected including screenshots of the organization's social media postings to Facebook and Twitter, the Facebook Insights report which shows the interactions a particular post received, and interviews. This study interviewed three employees of the organization from the communications department responsible for social media, one employee from the development department, and the organization president and CEO. This study also interviewed five constituents who regularly interacted with the organization on social media. Organization employees served as informants to provide a list of individuals who regularly interact with the organization's Facebook page or Twitter feed. For the purposes of this study, interaction in this case study was defined by a constituent "liking," "sharing," or writing his or her own post on the organization's Facebook page, or "favoriting," "retweeting," or directly "tweeting" on the organization's Twitter account at

least one time per week. That constituent list was then cross-referenced against the organization donor database to ensure that only constituents over the age of 18 were contacted for participation.

This study also analyzed any organizational social media analytics provided to the organization to examine how it determined future social media content, social media plans or schedules, and postings to both Facebook and Twitter for a one week time period that represents a typical week within an organization. A week that included a holiday, or that included a launch of a new program, was not selected. Choosing a week in which a new program was launched could have provided different numbers in terms of interactions that would not be representative of a typical week.

Yin's (2009) second principle was to have a case study database to store all collected information. All raw data collected, from transcribed interviews to scanned copies of documents, were saved on a separate flash drive that is password protected. This flash drive is stored in a locked, fireproof box. The recordings of the participant interviews are also password protected through the conference call system, which was used for recording the interviews.

In line with Yin's (2009) final suggestion on how to collect data in a way that will help a study establish reliability, a chain of evidence was established. This can be done by referring analysis back to the raw data, and by referring raw data collection back to the research questions and the conceptual frameworks from which the research questions were derived. One way that raw data collection referred back to the project methodology was the way the interviews were conducted. Creswell (2009) suggested that

these interviews be unstructured with the purpose of gathering as much data as possible from the participants (p.181). However, interviews were structured as a guided conversation (Yin, 2009) with a line of inquiry developed from the research questions. This helped to collect as much data as possible in the time that participants were volunteering.

After all the interviews were completed and transcribed it was time to analyze the data. Data analysis was done using NVivo, a computer-assisted qualitative data analysis software (CAQDAS). NVivo is cited to be easy to use, particularly with searching and analyzing data, while having the capability of storing multiple types of data in one program (Creswell, 2007). Qualitative researchers using constant comparative analysis often make use of software to help analyze the layers of data collected by interviews, observations, and document examination (Leech & Onwuegbuzie, 2011).

### **Ethical protection of participants**

The case study researcher establishes protection of participants by “gaining informed consent” that “protects privacy and confidentiality” (Yin, 2009). Yin suggested that the researcher look at industry standards to help create the consent form. The sample consent form provided by Walden University served as the basis for obtaining signed consent. This consent form clearly stated the length of time all data will be kept (5 years) so participants are aware of the shelf life of their interview answers. The data kept included the transcriptions of the recorded telephone interviews. In addition, I also incorporated points from the industry ethics standard, the Association of Fundraising Professionals (AFP) Donor Bill of Rights (Association of Fundraising Professionals,

2013). The standards included in this document ensured the protection of donors selected for interviews. To further protect participants, each interviewee was assigned a generic identifier, such as “Constituent A” or “Employee A” for analysis and reporting (Creswell, 2007).

The Donor Bill of Rights is based on the ideal of philanthropy as a “voluntary action for the common good” (Association of Fundraising Professionals, 2013). In the same way, participation in this study was viewed as voluntary action for the common good. The first article of the bill states that donors will be informed of the organization’s mission and how it intends to use the funds raised in support of that mission. Article 7 states that a donor should expect that all relationships with organizational representatives will be professional in nature. The rights of a donor to be removed from any list are covered in Article 9. One final article recognized was Article 5, which states that donors receive appropriate acknowledgement and recognition.

In this case study, participants were informed of the research question and subquestions, and how the information gathered would be used in an attempt to answer those questions. This was done via email prior to the interviews and reiterated again in-person or over the phone at the beginning of each interview. Yin (2009) suggested that case study researchers look to ethical standards put forth by professional organizations for guidance about how to best protect study participants and the information they share (p. 72). The Association of Fundraising Professional’s (2013) Donor Bill of Rights were used as a guideline to let participants know that their information was not going to be shared with anyone other than the researcher, nor would they be placed on any other kind

of solicitation list. In addition, it was reiterated at the beginning of every interview that participants could choose not to answer any questions and would be able to stop the interview at any time.

There were two instances where it was challenging to connect with the organization constituents who had provided a consent form, but all interviews were scheduled and conducted within a couple of weeks of receiving the signed consent forms. To ensure professionalism, I provided an outline of questions that were asked during the interview as well as an overview of the data storage and analysis procedures. This was also done via email and was also part of the introduction conducted during the employee and constituent interviews. Following these steps to ensure interview participants had information about the interview questions ahead of time, and were aware of the data storage and analysis procedures, were in line with Yin's (2009) guidance to execute "the case study with special care and sensitivity" (p. 73).

Post-data collection, participants received written appreciation for their contributions to the study. Participants were also offered the opportunity to review a memo report of the interview as a way to establish credibility and accuracy (Patton, 2002). Lastly, in congruence with the Donor Bill of Rights, study participants were informed of their right to withdraw from the study at any time for any reason.

### **Criteria for selecting participants**

Robinson (2014) stated that sample size is determined by taking into account the theory or conceptual framework studied and practicality regarding time and human resources (p. 29). Rather than collecting information from several national voluntary

health nonprofit organizations, which could potentially take a great deal of time to gain access, this study focused on one organization's use of social media. I selected the organization to study by using a combination of purposeful and convenience sampling. Purposeful sampling is a strategy of selection implemented to derive information from individuals who have the experiences necessary to help answer the research questions (Patton, 2002). Convenience sampling is selecting a case or cases that are available and accessible (Abrams, 2010).

The organization selected, a national voluntary health nonprofit located in the southeastern United States, has implemented a social media presence on Facebook and Twitter. Based in the southeastern part of the United States, its mission is to fund research focused on better treatments and a cure for childhood brain tumors (Pediatric Brain Tumor Foundation, 2014). The organization also has a scholarship program for survivors and has recently launched a patient support program. The organization was convenient not because of its geographic location in relation to the researcher, who lives in a different state, but because of the relationship between the researcher and the organization president and CEO who were colleagues at a different organization. While criticized for not being the most rigorous sampling choice (Patton, 2002), the access provided to constituent information due to the relationship between researcher and organization leadership was a major factor in this sampling decision. There was also the issue of potential bias on the part of the researcher, yet the ease of access to participants and information was a benefit to selecting this method.

Qualitative research designs typically use a small sample of participants as opposed to quantitative research designs which typically make use of larger samples (Miles & Huberman, 1994). Creswell (2007) further stated, “purposeful sampling is used in qualitative research” (p. 125). Some scholars, including Marshall (1996), refer to purposeful sampling as “judgment” sampling (p. 523). Individuals and/or organizations are selected for study because they will provide the data to help explain components of or variables from the concepts or theories studied (Robinson, 2014).

In this study, there were two different types of participants. One participant type were employees of the organization responsible for social media. There are three staff members who work on social media who agreed to participate. In this single case study design, I conducted in-person interviews with organization staff from the communications department responsible for social media content strategy and implementation. In the event that those employees were unable or unwilling to participate an invitation was also extended to the development employees as the two departments collaborate on stakeholder engagement strategies. As a result, a total of five in-person interviews took place at the organization’s headquarters in the southeastern United States.

The second type of participant for this project was drawn from the organization’s constituents. Qualitative research studies in particular provide a challenge when determining sample size. As Marshall (1996) stated, “appropriate sample size for a qualitative study is one that adequately answers the research question” (p. 523). Patton (2002) further underscores the ambiguous nature of participant selection in qualitative designs by guiding researchers to embrace the “no rules” nature of participant selection

and to focus on gathering in-depth information to explain the study phenomenon (p. 244). To help guide qualitative researchers, Creswell (2007) suggested using no more than four or five cases and using maximum variation to select those four to five cases. Maximum variation sampling “documents diverse variations and identifies important common patterns” (Creswell, 2007, p. 127).

A total of 86 constituents were identified as meeting the organization constituent research criteria. The criteria for organization constituent participation for interviews was that they needed to be people who were over the age of 18 and who interacted with the organization social media at least once a week. Interaction in this case study meant that a constituent “likes,” “shares,” or writes their own post on the organization’s Facebook page, or “favorites,” “retweets,” or directly “tweets” on the organization’s Twitter account. Those constituents were notified via email about the study. Appendix A shows the text that was used in that email. Following Creswell’s advice, a minimum target for constituent participants was five. Constituents were initially selected first by identifying individuals who interact at least once a week with the organization’s Facebook page or Twitter account. The five participants who responded from the organization’s constituent list shared the common pattern of regularly interacting with the organization through Facebook and Twitter. As people respond to a post or Tweet originated by the organization, their screen name, typically their real name, appears along with their comment. Those who were identified by the organization as frequent responders, by regularly posting a response to the organization’s content on Facebook or Twitter, were placed on a shortlist for possible study participants. Then those individuals were cross-

referenced with a list of current donors to the organization. Any individuals identified who were under the age of 18 by checking against the organization's main database, which included deeper biographical information, were excluded from this study.

The intent was that at least three of the five participants selected were Facebook participants as the organization's Facebook page has 17,000 followers as opposed to approximately 1,200 followers on Twitter. Potential diverse variations in the selection process may have been that not all constituents were donors, were of the same gender, generation, or geographic area. Supporting this point of view, Maxwell (2005) stated that explicit selection of cases, rather than a random sampling, gives greater confidence that conclusions drawn from the study are a better representation than random or convenience sampling. For this reason, gender of potential participants was considered as well to ensure a full-range of perspectives is gathered.

Geographic location of identified constituents was considered as well. While the organization does not have a local chapter or office in close proximity to where the researcher lives, it does have an annual fundraising event that takes place within driving distance. Constituents who met the criteria of regularly interacting with the organization through its social media sites, and who also live within 50 miles of the researcher were at the top of the list for potential participants. Those individuals would have had a greater likelihood of being available for in person interviews rather than an interview over the phone. Unfortunately there were not any constituents who had agreed to participate within that geographical range.

Potential participants were contacted via email after the organization had alerted potential participants about the opportunity to participate in the study. Any potential participants located within driving distance of the researcher would have been asked to participate in an in-person interview. However, any constituents who fit that criteria did not respond to the requests for participation. Those who were not located within 50 miles of the researcher were contacted about participating in either a phone or Skype interview. Conducting interviews through Skype would have allowed the researcher to observe body language and facial expressions in addition to collecting answers to the interview questions. However, all the participants who agreed to take part in the study chose to have a conference call rather than Skype.

Since I followed Creswell's (2007) recommendation of selecting no more than five cases for interviews, there was the risk that not all five cases selected would be willing to participate in an in-person, Skype, or telephone interview. Participant recruitment can be very "unpredictable" (Robinson, 2014, p. 31). With that in mind, the plan was to contact the organization employees acting as informants to provide additional names for participation. That presented the possibility that none of the interviews with organization constituents would be in-person thereby impacting the quality of the data collected. If "informational redundancy" had not been achieved (Lincoln & Guba, 1985, p. 202) with those five cases, I would have made arrangements to interview another five cases. However, informational redundancy was achieved.

Three male and two female constituents agreed to participate in the study. These five constituents were spread across five different states: two in the southeast, one in

Texas, one in Ohio and one in the mid-Atlantic region. Four of the five interviewees interact with the organization through its Facebook page and one interacts mainly with the organization's Twitter account. All five constituents were volunteer leaders with the organization. This was not the criteria for participation, but was a coincidence.

### **Data collection choice**

In qualitative research, it is the researcher that is the data collection instrument rather than a particular tool or mechanism (Maxwell, 2005). Case studies can be difficult because there are not any standard data collection procedures (Yin, 2009). There are guidelines for conducting interviews and reviewing documents. However, there is no one, decisive, particular way to gather data. Gathering information from multiple sources, or triangulation, can help ensure and convey to the reader that the researcher was thorough and sought to gain a full perspective on the phenomenon studied. This study showed triangulation in data collection by using interviews, review of documents about the organization's social media strategy and analysis, and review of audiovisual materials in the form of the screenshots from Facebook and Twitter from the last week of January 2015.

Creswell (2007) suggested that there are four main types of qualitative data: observations, interviews, documents, and audiovisual materials (p. 129). Due to the nature of social media, that people are interacting in a virtual way through a computer, smart phone or tablet screen, observations would be difficult to conduct. I would not be able to travel to participants' homes, which could be located anywhere throughout the country since the organization has a national presence, to observe them. Therefore,

interviews were the primary source of data collection. To provide triangulation, documents such as the organization's social media written plan and calendar were examined.

Both staff of the organization responsible for social media and five individuals who regularly interact with the organization through Facebook and Twitter were interviewed. The organization sent out the requests to be interviewed and simply sent the signed consent forms onto me. From that point on, the organization did not have further contact with the constituents who had agreed to be interviewed about the research study about the interviews and the information shared. Each interview lasted approximately a half-hour with two of them going for 40 minutes. Staff of the organization were interviewed in person. Interviews with individuals who regularly interact with the organization through social media were conducted via phone. As the constituents were located in five different states, and not one of them the same state as the researcher, in-person interviews were not an option. Skype was offered as an option but each constituent selected the option to be interviewed by phone, as it was most convenient for him or her. Phone calls were placed through a company called Free Conference Call Service Providers, which allows for recording of calls.

The interviews both with the organization employees and with its social media constituents were structured. Miles and Huberman (1994) suggested a structured interview design when "working within well-delineated constructs" and to help focus the data collected during the interview process (p. 17). The research questions for this study influenced the interview questions created for both types of participants. However, the

interview questions were not mere conversions of the research questions, against which Maxwell (2005) cautioned. The interview questions were created to gain a deeper understanding of why an organization posts certain content and how its constituents perceive that content. Appendix B shows the structure of the interview questions for both organization employees and its social media constituents.

The interviews with organization employees went smoothly overall. While the interviews with each employee participant were scheduled in 30-minute timeframes, each employee offered to extend the interview into the next half-hour if necessary. Two of the employee interviews did last longer than 30 minutes so it was beneficial to have this time buffer available. There were a few times that I had to restate a question because it was not clear as it was written, or in some cases there were interview questions that did not apply to a particular employee's role within the organization. One example of that was the interview with the person from the development department. As this person did not have a direct role with social media implementation, a few of the interview questions were answered with "that is not something within my role" (personal interview, January 2015).

The biggest challenge with the constituent interviews was that they were all conducted over the phone. So, there was not a way to read constituents' body language. As the researcher, I had to ask a lot of confirming questions to be sure a line of questioning was clear and to be sure that the constituent felt he or she had fully answered the question to the best of his or her ability. Another challenge with the constituent interviews was that the individuals were making time for the interviews in the middle of their busy lives. It was necessary to be sure to keep on track for time. Two of the

constituents were able to extend the time for the interview by a few minutes. However, I was able to go through all the interview questions in the time allotted for all constituents.

To check for clarity, each of the interviewees received a one-to-two page summary memo of their answers after the interview to check for clarity. The format of this summary is based off of Miles and Huberman's (1994, p. 53) sample illustration of a memo. In addition to recording the date of the interview, the date the memo was written, and the type of contact that was had with each interviewee (in person or through the conference call line), the memos covered four main categories:

- Main themes from the interviewee responses.
- Summary of the information based on the research question and three subquestions.
- An open category for anything thought provoking that came up during the interview.
- Any new questions for the interviewee.

Each of the interviewees responded that he or she had received the memo and did not have additional information to share. Appendix C shows one of the constituent memos. Follow-up conversations were had with the organization employees responsible for social media to better understand the social media analysis, the third component of data collection discussed below, which was provided.

The next part of the data collection was to look at the organization's Facebook and Twitter posts for one week. Permission to use the screen shots of these posts was granted by the communications department which only posts stories of its "stars," or

individuals who have received a diagnosis of a pediatric brain tumor, after receiving a written waiver from the individual or the parent/guardian (personal communication, August 2015). For the final week of January 2015, I took a screen shot of each post and pasted that into a word document. It was important to see the words that the organization used in communicating with its followers as that could impact how its constituents perceive the organization.

The final data collection involved collecting at the organization's analytics on its social media. Facebook offers an analysis on a weekly basis of the week's posting by the organization. The organization shared that Insights report with me so that I could examine what kinds of information received the most interaction from its followers. Unfortunately the organization does not have the same kind of analysis for its Twitter account.

Qualitative research differs from quantitative research in that the goal is to gather as much information as possible about a phenomenon rather than work to develop generalizations about that phenomenon (Lincoln & Guba, 1985). The goal of this study was to determine how an organization's social media usage was impacting its annual fund revenues. By talking to organization employees responsible for social media and fundraising initiatives, interviewing five constituents from five different areas of the country, looking at the social media posts in a typical week to best represent what the posts look like most of the time, and examining the analytics available, a significant amount of information was gathered. Informational redundancy was perceived when most of the constituents had similar answers to the interview questions. One example of

that kind of informational redundancy was that each of the constituents stated that the kinds of social media he or she shares most frequently through Facebook and/or Twitter are postings that highlight a child who has been diagnosed with a brain tumor. More information about the analysis of the interviews, the social media postings themselves, and the analysis can be found in the next section.

### **Data analysis**

Rather than waiting until all data is collected, Maxwell (2005) urged qualitative researchers begin analyzing data “immediately after finishing the first interview or observation” (p. 95). Miles and Huberman (1994) supported this statement by stating that “coding is analysis” (p. 56). As additional data is collected, ongoing coding of data collected helps to shape future data collection and can help reveal biases to the researcher. By not waiting until all data is collected, the researcher can adjust the course of data collection along the way ensuring enough is collected and accounting for known biases.

Following those recommendations, I input each transcript of each interview into NVivo, as soon transcription was complete. I did not wait for all interviews to be completed before transcribing. The employee interviews took place all in one day and were completely transcribed within one week. The constituent interviews took place over the course of 32 days. As each constituent interview was completed, it was transcribed and imported into NVivo within 48 hours. NVivo, one of the computer-assisted qualitative data analysis software tools available, was selected for this project because of its ease of use and security features. Once text is entered or imported into NVivo, the

system can conduct queries as directed by the researcher, such as word frequency, and show relationships between text used in various pieces of data (Franzosi, Doyle, McClelland, Putnam Rankin, & Vicari, 2013). The screen shots of the social media posts were uploaded at the end of the week during which they occurred.

As each transcribed interview was uploaded, I began sorting the text with a list of codes derived from the conceptual frameworks used to shape the study. The five employee interviews were sorted at the same time since the interviews all took place on the same day and it was important to immediately complete the transcription. The text from the constituent interviews was sorted one by one as those interviews took place over the span of slightly more than one month. The conceptual frameworks from which the codes were derived were Hon and Grunig's (1999) organization-public relationship measurement guidelines and Kelly's (1998) fundraising guidelines. These conceptual frameworks were used as a guide for the codes because both concepts focused on organization-public relationships. During the search for literature on social media and the role it plays on relationship building, and ultimately fundraising, these concepts were cited multiple times by several different researchers. From those concepts I derived initial codes included words that are often used to describe communications or relationships. Those codes were:

- Openness – The organization is open about its activities and constituents are open about their perspectives (Hon & Grunig, 1999, p. 14).
- Understanding – Both the organization and the constituents understand the organization mission and vision (Hon & Grunig, 1999).

- Sharing – An important concept in social media when followers spread social media content within his or her personal network (John, 2013).
- Conversation – Organizations strive to have two-way conversations with its constituents through social media (Rybalko & Seltzer, 2010; Waters et al., 2009).
- Support – Largely financial support, but also meaning public support for an organization's mission.
- Relationship – Ongoing, two-way symmetrical interactions between an organization and its stakeholders focused on generating support for the mission (Kelly, 1998).

As each interview transcript was completed it was analyzed for the codes listed above. Additional codes were added as I read through the transcripts. As I started to notice particular concepts emerging, I added those to the list. In some cases codes emerged because a concept kept coming up in multiple interviews. For example, forms of the word *engage* came up multiple times in several different interviews. However, other words such as *educate* and *comment* only came up in one interview each. They were added as codes based on the emphasis that the interviewee placed upon it. Participant emphasis on a particular concept, as opposed to researcher emphasis, is a hallmark of qualitative studies (Creswell, 2007). While reading through each transcript, I selected sections of the text that pertained to the codes. Rather than adding the word *fundraise*, I used the word *donate* as it applied to both the constituent and employee interviews.

Obtaining a donation, through relationship building, is the goal of fundraising (Kelly, 1995). The full list of codes can be found in Chapter 4.

Triangulation in data collection methods is one way to establish validity within a study. Triangulation of data analysis methods can add to the validity (Leech & Onwuegbuzie, 2008). For each type of data collected, I used word count, keyword-in-context (KWIC), and classical content analysis. Word count data analysis suggests that the frequency with which a participant uses a particular word indicates the value he or she places on the word (Leech & Onwuegbuzie, 2008). This was important so that I could determine what was important to both the constituent and the employee interviews. KWIC examines how words are used in context (Leech & Onwuegbuzie, 2008). This can be done by looking at the words both leading up to and following the particular keywords selected (Leech & Onwuegbuzie, 2007). For this study, it was also important to see if there was any differentiation between how constituents and organization employees use a particular word. Keywords can be selected both before and during data collection. For the purposes of the study, the keywords I looked for were relationship, mission, funds, money, research, programs, community, openness, sharing, support and talk.

The final data analysis technique used was classical content analysis. Classical content analysis is defined by Hsieh (2005) as a “subjective” way to code the data in an effort to identify themes and patterns (p. 1,278). It can be both deductive and inductive (Leech & Onwuegbuzie, 2008). In this study, I counted the codes found within the data based off of the conceptual frameworks used for this project as well as those that were added during a review of the transcripts. Further analysis was done by looking at the full

quote from a particular interviewee. A full list of codes, including those identified prior to collecting data as well as those that emerged in reviewing the transcripts and the social media posts, can be found in Chapter 4.

Other ways to establish validity within a research project are to be aware of, and ready to address, researcher bias and reactivity (Maxwell, 2005). Miles and Huberman (1994) stated that one of the ways a researcher can be biased during data collection and analysis is by making the assumption that the study participant who comes across as more articulate than others is providing more accurate or in-depth information. This is a bias I was aware of especially when interviewing participants who are organization constituents. These constituents had various knowledge and education levels. However, I addressed this bias by interviewing both organization staff and organization constituents which is one way to weight the evidence (Miles & Huberman, 1994). Organization staff provided information of value because they are close to the social media implementation strategy. Organization constituents also provided information of value because they have in some way been impacted by a pediatric brain tumor and have chosen to support the organization.

Another way to establish validity is by getting feedback from study informants (Maxwell, 2005; Miles & Huberman, 1994). Yin (2009) also suggested showing preliminary findings to a colleague or two who have knowledge of the information studied and will provide critical feedback based on that knowledge. For this project, each study participant had the opportunity to review a memo, which summarized his or her responses to the interview questions. Drafting memos is a data analysis technique that

Miles and Huberman (1994) proposed as an early step in analysis. Allowing participants this opportunity can help to ensure the reliability of the information obtained before getting too deep into the analysis process. In addition, I identified one former colleague to review preliminary findings. This individual has been responsible for social media strategy, implementation, and analysis for another organization for four years.

### **Conclusion**

The goal of qualitative studies is to provide greater understanding of issues affecting specific groups of humans as opposed to providing generalizations about the population at large (Marshall, 1996). To provide this greater understanding, this case study utilized different forms of data (interviews, documents, and audio visual materials) as suggested by (Creswell, 2007). In an effort to reduce bias, I triangulated the data collection, and coded the data as collected. Ongoing analysis allowed me to make adjustments to the codes that were initially set so that I could analyze the data. Chapter 4 describes the analysis in further detail and describes the patterns and information that emerged during the analysis.

## Chapter 4: Results

### **Introduction**

This chapter describes the process of securing participation, collecting data, and the ensuing analysis to answer the question of how relationships built between one organization and its constituents through social media affected its annual fund revenues. Finding out the effect of social media on organization-public relationships could show that this cost-effective tool can be useful in helping nonprofit organizations better meet their missions. To determine the effects of social media, I created additional subquestions to explore what constituents believe about their access to organization information, what benefits constituents believe they receive interacting with this organization's Facebook and/or Twitter accounts, and how those interactions influence decisions to financially support the organization. Any discrepant cases and nonconfirming data are highlighted. Next, the chapter illustrates any emerging patterns and the findings from the analysis in relation to the research questions. Finally, the chapter closes with an explanation of the evidence of quality of the data.

### **Data Collection**

The organization selected for this research was the national headquarters for a national, voluntary health nonprofit located in Asheville, North Carolina. Its mission is to eliminate the challenges of childhood brain tumors (Pediatric Brain Tumor Foundation, 2014). Funding research for a cure and better treatments, providing education and support for families facing a diagnosis, and supporting work toward a national database are ways the organization works toward that mission.

As outlined in Chapter 3, the plan for recruiting constituents for interviews was two-fold. To secure the necessary participants for data collection from the organization, which was a minimum of three employees from the communications team, the president and CEO sent an email to the communications and development staff. Three members of the communications team and one member of the development team responded with emailed consent forms. The president and CEO also opted to take part in the interview process. This exceeded the goal of recruiting three employees for the interview process, in addition to interviewing employees outside of the communications team. The five employee interviews took place face-to-face all in one day at the beginning of January 2015 at the organization's headquarters in Asheville, North Carolina. The videos were recorded through the researcher's laptop so that the audio could be transcribed after the interviews. The videos ranged from 20 to 45 minutes in length and lasted the duration of the interview. There were at least 30 minutes between each interview during which I imported the videos into NVivo. I started transcribing the audio that same evening beginning with the first video conducted. Transcription took 5 days. The biggest challenge to the transcription process was the time that it took because I had to slow down the audio significantly to accurately type the answers to the questions.

The second step for data collection was to reach out to the constituents who interact at least once a week, by "liking," "sharing," "retweeting," "favoriting," or posting a comment to the organization's Facebook page or Twitter account. The goal was to conduct to at least five interviews. To secure the necessary participants for constituent interviews, the organization looked at its regular social media participants. As Yin (2009)

suggested, these individuals were identified as qualified for the case study by the organization to avoid contacting potential participants that did not interact with the organization through social media. This helped to narrow down the possible constituents from the entire organization database to a number who fit the designated criteria (Yin, 2009). An email was sent to the 86 individuals on that list after gathering their information from the organization's database. That initial email generated one initial response. A second email was sent to the same list one week later that generated four additional responses. The constituents who agreed to take part in the study were from five states in the eastern and central areas of the United States. Three of the participants were male and two were female. Four of the constituent interviews took place through a free conference call service that offered a recording feature. One interview had to take place outside of the conference call line because of service issues with the conference line. That interview was conducted through cell phones with the answers recorded on paper.

In addition to the employee and constituent interviews, I examined a week's worth of Facebook and Twitter posts. The week chosen to review these posts was the week of January 26, 2015. I selected this particular week because there were no special fundraising campaigns taking place so this was a typical, average week within the life of the foundation. Because there was not a written plan of when the organization posts, certain types of content occur on a weekly basis. One such type of post that occurs weekly is the "star story" each Friday, which is a posting about a child who has been diagnosed with a brain tumor. The "star story" can highlight a child who is in remission, who is currently fighting his or her brain tumor, or who sadly lost the fight. The

organization then supplied the Facebook insights for that week. Insights is the name of the report that Facebook generates, for business and organization pages, to show the response and reach of posts on a weekly basis. The organization does not yet do an analysis with its Twitter posts.

At the completion of each interview, a memo of the information gathered was created. Creating memos after each interview is a way for the researcher to not get overwhelmed by the large amount of information collected through the interview process. Maxwell (2005) further stated that memos are way to record your thinking immediately following an interview, and that the process of writing a memo can help “facilitate such thinking” (p. 96). The memos drafted for this study were brief one to two page documents that related the information from the interview back to the research questions. The memos also noted any unique or unexpected findings. The researcher sent the completed memos to interview participants for verification.

### **Data analysis**

Once interviews were transcribed, the screen shots from both Facebook and Twitter were pulled, and the social media analysis was provided for the weeks’ worth of social media post was provided by the organization, formal data analysis began. The analysis was done to attempt to answer the research questions.

- RQ1.           How are relationships, built and maintained through social media sites, such as Facebook and Twitter, affecting an organization’s annual fund revenues?
  
- SubQ1.       How do donors who interact with the organization through social

media sites feel about their access to the organization's current awareness and fundraising campaigns or current research initiatives?

SubQ2. What, if any, benefits do donors personally feel they get from following this organization's social media?

SubQ3. In what ways have donor interactions with the organization through social media influenced the decision to give as well as the level of the gift?

Word count, keyword-in-context, and content analysis were conducted to determine answers these questions. A basic word count was the first type of analysis conducted on the interviews and on the text from the Facebook and Twitter postings. Word count was selected as the first method of analysis because it allows for patterns to emerge based on how many times particular words were used (Leech & Onwuegbuzie, 2011). NVivo automatically accounts for words that may not be significant for analysis, including prepositions and conjunctions, which are designated as stop words. Additional words added to the stop words list were: *social*, *media*, *Facebook*, *just*, *really*, *Twitter*, and *yeah*. The word *just* was included in the stop words list because in the context of these interviews it was used as an adverb rather than an adjective. The words *social*, *media*, *Facebook*, and *Twitter* were added to the stop words list since they were likely to be used most frequently as the interviews included questions specifically about those things.

Next, a keyword in context analysis, or KWIC, was done. This type of analysis was done to make sense of how interview participants used particular keywords in the context of their answers to the interview questions. With qualitative research, it is important to maintain the individuality of the participants' context behind those answers (Maxwell, 2005). The words selected for KWIC were: *relationship, mission, funds, money, research, programs, community, openness, sharing, talk, and support*. *Relationship, community, openness, sharing, talk and support* were determined a priori based off of Hon and Grunig's (1999) conceptual framework of organization-public relationship. *Mission, funds, money, research and programs* were also selected a priori and were based off of the research questions. This query was done using the transcripts from both the employees and the constituent interviews. The query was then exported into a separate document to first see if there were any noticeable differences between interviewees on word usage.

The final data analysis technique used for this study was classical content analysis, or a count of codes. Initial codes that were designated before data collection were *openness, understanding, sharing, conversation, support, and relationship*. These codes were selected because of their connection to organization-public relationship building. Additional codes added during data collection were *awareness, communication, connection, donate, engagement, images, information, interaction, involved, knowledge, questions, recognition, response, story, and tag*. These codes were added based on words or phrases that came up during data collection and also related back to the conceptual frameworks. While analyzing the data, variations of the code words were included. For

example, anytime *engage* or *engaged* were used by constituents or employees those words were coded under *engagement*.

### **Discrepant cases and nonconfirming data**

Within the employee interviews, there were not any discrepant cases or nonconfirming data with the communications team. Answers to the interview questions were consistent even though each employee has a different role in implementing social media. One interviewee oversees the implementation and strategy development, one implements the strategy by posting and monitoring, and one analyzes the postings. In addition to these three employees from the communications department, one employee from the development and the organization's president and CEO opted to participate in the interviews. The organization president and CEO is largely kept informed by the communications team as to the status of the organization's social media, and had a sense that the organization's social media is meeting its goals. The development employee interviewed also had a sense that social media is building awareness. When asked what the purpose of the organization's social media was, the response was "to raise awareness, and engage our, constituent base and expand our constituent base" (personal communication, January 13, 2015). Yet the development employee is not certain how or if the organization's social media is helping with fundraising, particularly when it comes to non-event fundraising. This is considered a slightly nonconfirming case. The employee knows the organization's social media has a large following, but is not seeing it working towards the larger goal of impacting the organization's fundraising. When asked if any of the employees directly responsible for social media have ever brought forth a potential

donor based on social media activity, the response was “I’ve not had someone bring a prospect to us because they’ve been actively engaged” (personal communication, January 13, 2015).

Within the constituent interviews, only one of the constituents engaged more through Twitter than through Facebook. That constituent used Twitter not only to keep up with the Pediatric Brain Tumor Foundation, but also as a way to link into other pediatric cancer organizations. According to this constituent, the other pediatric cancer organizations end up following this individual on Twitter.

I started following similar organizations focused on brain tumors on Twitter. They followed me back. So now when I retweet something from PBTF, it goes out to those organizations’ Twitter accounts, too.

-Constituent B

The other four constituents who primarily use Facebook mostly communicate postings within their own personal networks. Constituent A stated, “Oh yeah. I share everything on my personal page” (personal communication, January 24, 2015). Constituent C also stated, “Definitely I share those opportunities that they’ll post” referring to PBTF’s posts about getting involved.

Regarding the question of whether or not social has any impact on constituent giving; only one constituent indicated that social media had not impacted decisions about supporting the Pediatric Brain Tumor Foundation or other organizations. This constituent stated, “I don’t knee-jerk react to that” (personal communication, February 4, 2015). Other constituents were able to cite at least one example of when he or she learned of a

need through Facebook or Twitter caused them to give or to take some kind of off-line action. In a few cases, those examples were about postings of individuals in need in his or her own immediate, geographic community.

### **Emerging patterns and findings**

According to Miles and Huberman (1994) word count as an analysis technique can be a valuable way to see emerging patterns. What was interesting about the word count analysis is that the most used word from the transcripts and social media postings was *people*. There is a saying in the world of nonprofit development that fundraising is, “people asking people to help people” (Weinstein, 2009, p. 1). If people have historically been at the heart of fundraising, it is interesting to see that even through social media, which can be an impersonal form of communication, the interviewees still place a high value on people over other words like *money* or *programs*. Table 1 shows the top 25 words used in all the text from interviews and social media postings. Similar words were included in the count. For example, all variations of the word *using* such as *use*, *uses*, and *used* were included in the count of the word as it appeared first in the text analysis. Conducting a word query in NVivo created the word count table.

Table 1

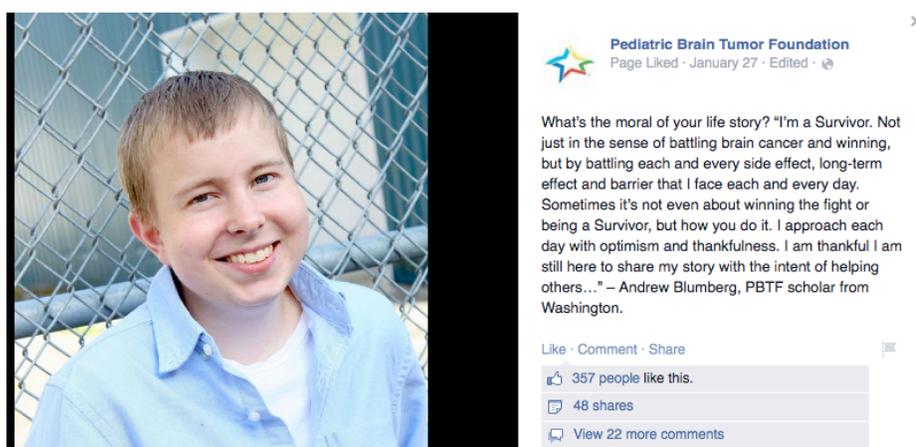
*Most Frequently Used Words from Interviews and Social Media Posts*

<b>Word</b>	<b>Count</b>	<b>Similar Words</b>
People	146	people
One	111	one, ones
Like	111	like, liked, likely, likes, liking
Get	103	get, gets, getting
Kids	98	kid, kidding, kids
Organizations	93	organization, organizations, organize, organized, organizers
Things	92	thing, things
Rides	90	ride, rides
Event	89	event, events
Using	83	use, used, uses, using
See	83	see, seeing, sees
Posts	78	post, posted, posting, postings, posts
Engaged	75	engage, engaged, engagement, engagers, engaging
Want	75	want, wanted, wanting, wants
Lot	75	lot, lots
Year	71	year, years
Fundraising	70	fundraiser, fundraisers, fundraising
Times	69	time, timed, timely, times, timing
Going	68	going
Way	62	way, ways
Information	59	inform, information, informed
Make	57	make, makes, making
Trying	57	tried, try, trying
Well	54	well
Support	54	support, supported, supporter, supporters, supporting, supportive

*Kids* was the fifth most used word, which was not a surprise since the organization raises funds to research the causes of and treatments for pediatric brain tumors. However, *kids* was not one of the original words selected as a code since it does not relate back to the conceptual framework of organization-public relationships. Many

references were made to the organization's work in both the employee and constituent interviews.

Organization employees noted that stories about the kids impacted by brain tumors often received the most interaction on social media by garnering a high amount of likes or shares. Constituents also noted this was the type of content they shared the most within their networks. While Kelly (1998) may consider this a form of press agentry, the constituents interviewed also noted that posts about the kids are what they share the most within their personal social networks. However, the Facebook Insights for that week showed a different kind of activity. There was a posting about an item signed by celebrities that was being auctioned off with the proceeds benefiting PBTF. While the post with the most unique views was about a survivor who is a scholarship recipient, the post with the most unique clicks was the post with the auction item. The two different posts are illustrated by Figures 1 and 2. The information from the Facebook Insights report is illustrated in Appendix B.



*Figure 1.* Facebook post with most unique views from week of January 26, 2015.

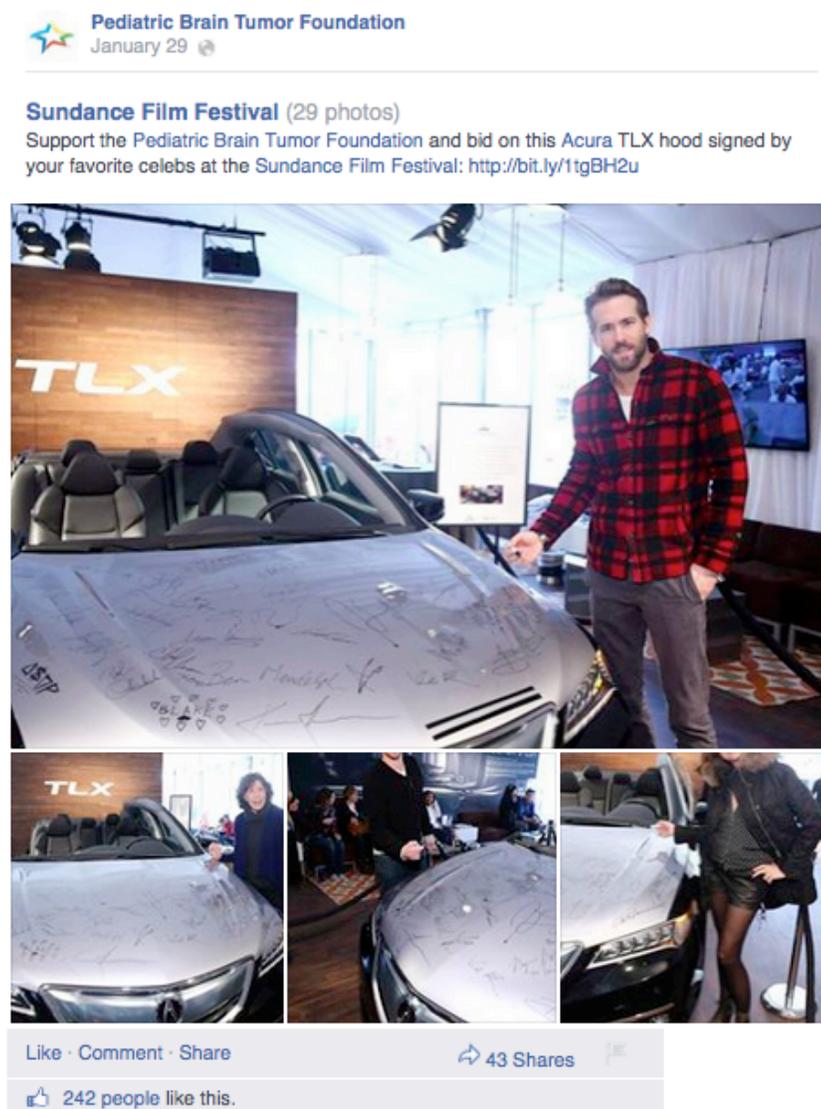


Figure 2. Facebook post with most unique clicks from week of January 26, 2015.

Forms of the words *engage*, *fundraise*, *information*, and *support* were on the list of top 25 words. *Support* was on the list of the original keywords selected before data collection. *Engage*, *fundraise*, and *information* were words added during the data collection process as they were appearing frequently in the transcripts from both the employee and constituent interviews. Forms of the word *engage* appeared 75 times,

forms of the word *fundraise* appeared 70 times, and forms of the word *information* appeared 59 times.

It was not a surprise to see *like* at the top of the list. In the case of social media, *like* is a verb used to describe an individual's decision to follow the organization's Facebook page. *Like* is also used to describe constituents' opinion on a particular post and is identified by a "thumbs up" graphic. It should be noted that there is not an "unlike" or "thumbs down" option for constituents to express their thoughts on a post they don't like. In addition, if a constituent is no longer interested in following the organization's page, he or she will simply go the organization's Facebook page and choose "unlike" from the drop down menu that appears when the "like" button is selected.

Engagement of constituents is a primary goal of social media (Waters et al., 2009). As one employee stated regarding the use of social media, "We like that it's a platform that we can talk about just about anything whether it's trying to engage families, letting them know about our new helpline which is coming soon" (personal communication, January 13, 2015). Fundraise was not an original code. However, it likely was frequently used because all five constituents interviewed also serve in a volunteer leadership capacity for the organization's Ride for Kids motorcycle event. Information came up several times. This was an important emerging pattern because it seemed to show that social media is still largely used as a way to disseminate information as opposed to a tool to engage people in offline activities (Saxton & Guo, 2011).

Keyword in context, or KWIC, showed some strong connections between the interviews and the organization's programs. KWIC is a valuable data analysis tool for

qualitative researchers to examine how study participants use particular words based on their perspectives (Leech & Onwuegbuzie, 2011). To begin this analysis, I conducted a text search on the transcripts from both the employee and constituent interviews for the following keywords: *relationship, mission, funds, money, research, programs, community, openness, sharing, talk, and support*. The text search function in NVivo not only queries the keywords, but also pulls over the words surrounding the keyword allowing the research to see the context in which the word was used. I then tabulated the number of times each interviewee used a particular keyword. Table 2 shows how often keywords were used by constituents and employees.

Table 2

*Keyword Usage by Employees and Constituents*

Keyword	Const. A	Const. B	Const. C	Const. D	Const. E	Empl. A	Empl. B	Empl. C	Empl. D	Empl. E
Community			6				3	3	3	1
Funds	4	2	2	8	4	3	3	3	3	7
Mission	1	1	2	4	4	3	1	8		3
Money	9		2	3	12	1	1	6		3
Open			3				1	5	1	
Programs					1	1	2	5	1	9
Relationship						2	3		3	
Research	3	5	10	6	5	2	2	3	3	8
Share	13	4	9	4	5		3	6	5	1
Support	1	5	19	7	4	2	2	6	3	5
Talk	4		5	2		3	5	26	1	2

The final type of analysis done on all the text collected for this study was classical content analysis. This analysis method counts all codes – those created before data collection and those created during and after data collection (Leech & Onwuegbuzie,

2011). The codes used classical content analysis were: *access, awareness, communication, connection, conversation, donate, engagement, images, information, interaction, involved, knowledge, openness, questions, recognition, relationship response, sharing, story, support, tag, and understanding*. Table 3 shows the emphasis both the constituents and employees put on certain concepts.

Table 3

*Use of Codes by Interview Source*

Code	Number of sources that used	Reference
Access	2	2
Awareness	8	26
Comment	1	2
Communication	6	17
Connection	1	1
Conversation	2	8
Dialogue	2	2
Donate	5	23
Educate	1	1
Engagement	7	41
Entertainment	2	3
Images	1	7
Information	7	15
Interaction	7	9
Involve	2	4
Involved	2	2
Knowledge	3	5
Listening	1	1
Openness	1	1
Photos	4	5
Questions	4	10
Recognition	3	8
Recruit	1	1
Relationship	4	6
Response	2	3
Share	8	20
Story	6	16
Support	4	6
Tag	1	2
Understanding	5	7

he code most used overall was *engagement*. This code was added during data collection. This code was used 41 times from seven of the 10 sources. As has been stated, engagement of constituents in some offline way, by volunteering or donating, is the ultimate end goal of social media. So, it was positive to see that both constituents and employees placed significance on engaging the greater public in its mission.

Two other codes that were identified the most within the transcripts of both the employees and the constituents were *awareness* and *sharing*. Eight of the interviewees referenced *awareness* a total of 26 times, and eight of the interviewees also referenced *sharing* a total of 20 times. Based on the concepts of social media as an awareness raising tool, and a constituent's sharing of posts as a way to expand awareness, this finding was expected. This supports the concept that social media is largely used as an awareness-raising tool for the organization, and that it is recognized as such by constituents as well as employees.

The high number of times that the code *sharing* was identified links back to the significant use of *share* in the KWIC analysis. This was one of the codes selected prior to data collection. Sharing is one of the ways that constituents can engage with an organization's social media because that share is then posted as an activity on the constituent's Facebook page or is posted as a retweet on their Twitter account. When a constituent shares an organization's social media post within his or her own personal network, this helps to expand awareness. Table 4 illustrates the KWIC analysis of constituents' use of the word *share*.

Table 4

*KWIC Interpretation of Constituents' Use of the Word Share*

<b>Keyword-in-Context</b>	<b>Interpretation</b>
Then, that got millions of <b>shares</b> . It wasn't him. I don't	Social media sharing
thing to be able to <b>share</b> with folks when you're explaining	Social media sharing
I do now. Definitely I <b>share</b> those opportunities that they'll post	Social media sharing
media. I would say definitely <b>sharing</b> upcoming events. That, from a	Social media sharing
see a lot of, is <b>sharing</b> and spreading the word about	Social media sharing
it as a way to <b>share</b> with friends – maybe who aren't	Social media sharing
they ask their researchers to <b>share</b> the knowledge that they've found	Not social media sharing
I would say probably I <b>share</b> more often when it's around	Social media sharing
organization that I support. I <b>share</b> and communicate with them. I'll	Social media sharing
and to be able to <b>share</b> their posts out to my	Social media sharing
allow me to more easily <b>share</b> with some folks, here's where	Social media sharing
time environment and then obviously	Social media sharing
<b>sharing</b> that out. It would have	Social media sharing
our event as well. Or <b>share</b> it with other folks so	Sharing information
person that's missing. And we <b>share</b> that page like	Social media sharing
crazy until	Social media sharing
that, it would. Well, I <b>share</b> as much as I can	Sharing information
bike night page, where we <b>share</b> different events for	Social media sharing
fundraising and	Social media sharing
with Facebook. The constituent did <b>share</b> a suggestion	Sharing a post on
that the organization	social media
look to Instagram to start <b>sharing</b> pictures. Feels it	Social media sharing
would be	Social media sharing
event. Feels that he equally <b>shares</b> and retweets	Social media sharing
postings on any	Social media sharing
keeps him informed. The constituent <b>shares</b> PBTf	Social media sharing
content through both his	Social media sharing

Once analysis was complete, I came back to the research questions to see if I had enough information to draw conclusions. I determined that I needed additional information to be able to truly say what kind of an affect social media had on the organization's annual fund. I conducted another phone conversation with one of the employees originally interviewed to see if any additional information could be provided. While it had already been stated that no donations had been received directly through the donation page that had been set up on Facebook for the Ride for Kids event (personal communication, January 13, 2015), it had been suggested by the former colleague selected to help determine evidence of quality that there may be additional information gleaned from looking at Google analytics (personal communication, March 8, 2015).

Google analytics for the prior Fiscal Year showed that there were six referrals from Instagram to the general PBTF website. (personal communication, April 7, 2015). However, Instagram was not one of the social media platforms selected for this study. The Google analytics showed that most of the traffic to the PBTF website comes from other websites. This employee's further examination showed that over the entire previous Fiscal Year, there were only 496 visits to the organization's website via clicks from Facebook representing .38% of the total referral traffic from any electronic source. Those visits were not necessarily unique visits.

In addition, this employee noted that the organization did have an increase year-over-year in online giving. However, when deeper analysis was done by the organization, it was realized that several businesses and organizations that typically make a donation to the organization by check simply chose to do so online this year. A nominal increase was

attributed to individual giving online, but it cannot necessarily be linked back to social media postings. The conversation with this employee concluded that email seemed to be a more effective method of raising funds.

That conversation, coupled with the analysis of the interviews, helped to answer the research question

RQ1. How are relationships, built and maintained through social media sites, such as Facebook and Twitter, affecting an organization's annual fund revenues?

Social media at this point in time is not having an immediate, direct impact on this organization's annual fund revenues. Both the organization staff and the constituents interviewed indicated that they could not link a particular post to a noticeable spike in donations for the Ride for Kids motorcycle event, the Starry Night walk event, or general donations throughout the year. This may be partially due to the fact that the social media strategy is to raise awareness of the organization, childhood brain tumors, and how people can get involved to help (Employee C, personal communication, January 13, 2015). Before conducting the interviews with the organization employees, I did not know that this was in fact the organization's main social media strategy. However, Hauswirth (2010) noted that the department that is mostly responsible for social media usually shows what intent an organization has for its social media strategy. Learning that it was mostly the communications department responsibility to implement social media concurred with Hauswirth's assertion that the intent likely was not driving revenue.

Even though the organization had created a specific fundraising page on Facebook for its Ride for Kids motorcycle event (Employee A, communication, January 13, 2015) the content of its Facebook posts and Twitter “tweets” were more to communicate about the organization and childhood brain tumors. This is consistent with what was found through the literature review – that both for profit and nonprofit social media sites are largely used to communicate information and are often an extension of information found on the organization website (Briones et al., 2011; Bryer & Zavattaro, 2011; Lovejoy & Saxton, 2012; Men & Tsai, 2012). A week’s worth of social media posts showed that the majority of content was about survivors. One story did include a call to action for followers to bid on an item autographed by movie stars.

This finding is also supported by the data analysis. *Fundraising* was one of the top 25 words from the word count analysis and was the only word related to money or donations. KWIC analysis showed that constituents did discuss money in their responses to the interview questions more than the organization employees. This shows that there is an understanding from the constituents that the organization needs funds and donations.

However, not all the constituents interviewed necessarily see that social media is a fundraising tool. Only one constituent specifically mentioned that she uses social media to help recruit volunteers and participants around the event, and then uses it during non-event times to encourage general donations (Constituent C, personal communication, February 3, 2015). However, there is not a clear line drawn from someone engaging through the organization’s social media and immediately making a donation. Constituents definitely see it as a tool for raising awareness and sharing information about the

organization. As once constituent stated, “I would say the Star Stories definitely would be probably the most I engage with,” (Constituent C, personal communication, February 3, 2015). Another constituent stated that upcoming events, especially the PBTF event he is personally involved with, are what he shares most (Constituent A, personal communication, January 24, 2015).

Event registrations are the only discernable, yet indirect, way that social media is impacting annual fund revenues. The organization did see about one to three percent of the new event participants in the past Fiscal Year come from social media (Employee A, personal communication, January 13, 2015). Yet event participants do not necessarily generate revenue as they are able to participate in the walk or motorcycle ride event for free.

Social media is not at this time having a direct impact on this organization’s annual fund revenues. Its current social media goal is more focused on building awareness, with the long-term, secondary goal of turning that awareness into donations to realize the organization’s mission (Employee E, personal communication, January 13, 2015). This goal was uncovered during the employee interviews conducted in January 2015. As stated before, the idea for this study came from personal experience of launching a fundraising event and having to promote it through social media. What did all those “likes,” “retweets,” and “shares” amount to in terms of cash donations? As the social media messaging evolves, at the organization studied, to perhaps include a call to action for financial support, there may be more of an impact of the organization’s social media on its annual fund.

In addition to wanting to determine the impact of social media on annual fund revenues, I also had additional questions about the organization's social media. My first subquestion was

SubQ1. How do donors who interact with the organization through social media sites feel about their access to the organization's current awareness and fundraising campaigns or current research initiatives?

The donors who were interviewed for this study were very knowledgeable about the organization's research and programs.

Their mission is to cure childhood cancer brain tumors, so what they do is they raise money funds through different organizations like the Ride for Kids or the Starry Night. And most of the money goes towards research, small percentage now goes towards patient support services because the children are now living, whereas before they weren't. It's one of the deadliest cancers out there.

-Constituent E

This can be seen by the KWIC analysis and the number of references the constituents made to research. However, the knowledge seems to be more reinforced through social media than gained solely through social media. The constituents interviewed cited the annual volunteer conference and emails from the national office as one of the main ways that they stay up-to-date on what is happening with the foundation's research and programs.

Although the constituents interviewed did state that social media is just one of the communication types that keeps them informed, they also stated that they frequently share information about the organization within their own social networks. As one constituent stated, "...every chance I get I put in Pediatric Brain Tumor Foundation in my post and share it just so it goes out there more than what it would if I was just talking to a group of people at a meeting," (Constituent D, personal communication, February 4, 2015). The constituents interviewed not only feel that they have a great deal of access to the activities of the organization due in part to social media, but also feel that information disseminated through social media helps them to provide that access to others who may not be as closely involved with the organization. One constituent shared an example of how she shared information about the Foundation after one of the local Ride for Kids participants' children was diagnosed with a brain tumor two months after the event.

It's a really easy, non-threatening way to engage somebody like that with the Foundation. I talked a lot to her about calling some of the folks and seeing if I could pass along information so their [the Foundation's] family support people could call my coworker. That was too intimidating for her, or overwhelming or something. Maybe it was too real, so she had a hard time making that connection. Facebook is something she could follow because it was non-threatening, and she thought it was a great cause anyway. It was a good way to kind of introduce a place where she might be able to find support.

-Constituent C

The constituents interviewed also were able to speak to other benefits that they receive as followers of PBTF's Facebook and Twitter accounts which was the second subquestion

SubQ2.           What, if any, benefits do donors personally feel they get from following this organization's social media?

One example of a benefit is that constituents realize through following the organization's social media was found through the code *relationship*. For the purposes of this study, the word *relationship* refers to the organization-public relationship between the Foundation and its constituents, and in some cases between constituents. This type of constituent-to-constituent relationship building is considered "dialogue" which is defined as dialogue between an organization, its constituents and the constituents themselves by way of the organization's communication channels (Porter et al., 2011).

It's provided me with getting to know people. It's maybe not face-to-face or personally, but getting to know people around the country who do what I do, you know, volunteer leaders, able to stay in touch with them is easier now through social media, and also see what's going on with the stars in their local cities and sending out support messages, and wishing them well at their even and so on.

-Constituent D

Another benefit was found through the code *recognition*. One constituent stated that his interaction with the organization's Twitter feed has provided him with recognition as a volunteer and has enabled him to involve and recognize his students (personal communication, January 27, 2015). As Porter et al. (2011) stated, consumers or

constituents interacting with each other through a Facebook or Twitter page should be part of a company or organization's social media strategy. So not only do constituents benefit from building relationships with each other, the organization potentially benefits as well. While PBTF is not yet realizing an impact on its annual fund revenues due to social media, the relationships now being built between constituents through social media may result in future donations. Waters (2008) stated this in his work about donor cultivation strategies and the importance of building strong relationships over time. What begins as a social media interaction could result in future donations if cultivated correctly.

A final benefit the constituents noted of following the organization's social media was that they receive timely information. One constituent noted that she would likely go to the organization website to find information (Constituent E, personal communication, February 17, 2015). Another stated that he would learn information about the organization through email blasts (Constituent D, personal communication, February 4, 2015). This concurs with Lovejoy and Saxton's (2012) findings that organizations use social media mostly to disseminate information that can be found on their websites (p. 351). Yet social media ensures that the information gets out as opposed to a constituent having to seek it out.

The final research subquestion for this study was

SubQ3. In what ways have donor interactions with the organization through social media influenced the decision to give as well as the level of the gift?

As has been stated, the organization's main goal for its social media strategy is largely awareness raising rather than making direct asks for donations. By going back into the sources for the code *donate*, I saw that two of the constituents stated that they did not feel that the information that they see and interact with did not impact their decision to give or to increase the size. When asked how he might respond to a request from a Facebook friend for a donation received over social media, one constituent responded:

I look at what their mission is and once I determine that it might be something I'd be in supporting, then I do research and find out how many pennies out of my dollar are actually going to go to their stated mission. And if they're not over 85 percent, I probably will not support them. Anything below 80 percent I will not.

-Constituent D

Yet another constituent stated that, "I would say that their social media sites provide additional opportunities to give outside of just some of the big events like Ride for Kids and Starry Night," (Constituent C, personal communications, February 3, 2015). So it seems like information disseminated social media affects some constituents giving behavior but not all.

### **Evidence of quality**

To show evidence of quality, the researcher shared the findings with one former colleague from a previous job with another organization. Yin (2009) suggested this as a strategy to help establish validity. This former colleague is the Director of Communications for a national voluntary health organization that's mission serves an adult population rather than children. For the past four years her responsibilities have

included social media strategy, implementation, and analysis. This former colleague has the understanding of the concepts of social media, fundraising and organization-public relationships.

Overall, this former colleague felt that the findings arrived at for this study were consistent with her experience. Postings about individuals, especially those that include living well with the disease, garner a large amount of social media activity in her experience. In addition, the lack of activity on the specific Ride for Kids donation page on Facebook was consistent with this former colleague's experience. While the organization she works for does not have a specific Facebook donation page, in her opinion this is consistent with industry knowledge.

One part of the findings that surprised this former colleague was the constituent's high usage of the word *research*. In her experience with the organization she currently works, people are often unclear about its research focus. This is a point of discussion. PBTF is the largest nonprofit of its kind funding research for childhood brain tumors. Unlike some other diseases, there are not three or four national organizations focused on childhood brain tumors. There are some smaller, family foundations, but nothing on a national scale. So because the disease space is not saturated with several organizations working on the same cause in a different way, the mission of PBTF is not as easily confused as with some other diseases.

### **Conclusion**

This chapter reviewed in detail the data collection process, the data analysis process and described the conclusions drawn from the analysis against the backdrop of

the research questions. Emerging findings were that the organization is not seeing an immediate, direct effect on its annual fund. The constituents that regularly interact, by “liking,” “sharing,” “favoriting,” “retweeting,” or directly messaging the organization through Facebook or Twitter at least once a week, feel that they are more informed because of that interaction. These constituents are most affected by the “star stories” and stated that is the kind of content they interact with and share with others in their personal networks the most. Interpretations of the findings, the implications of the findings on social change, recommendations for actions based on the findings, and a reflection of the research process are covered in the final chapter of this study.

## Chapter 5: Findings and conclusions

### **Introduction**

This chapter reviews the findings from the study and its implications for social change. Also covered are recommendations for action based on the study's findings and various avenues for future research. Reflections on the research process, from data collection to analysis, round out this chapter.

### **Overview of why the study was done**

Social media is a relatively new phenomenon (Taylor et al., 2011). Therefore, a gap exists in the research on how use of social media by nonprofit organizations affects annual fund revenues. This study was conducted to see how one organization uses social media and whether its social media content affected its annual fund revenues. Social media is an inexpensive marketing tool, as it does not cost anything to start a Facebook page or open a Twitter account. An organization and its constituents can make direct asks to a larger community through social media for fundraising events and general support (Farmer, Bruckner Holt, Cook, & Hearing, 2009). Nonprofit organizations continue to be cited as not taking full advantage of their websites by continuing to use more one-way communication than more interactive strategies (Briones et al., 2011; Men & Tsai, 2012; Pope, et al, 2009). I was curious to see whether that trend was happening with this organization's social media as well.

To determine whether this organization was making the most of its social media interactive properties, it was critical to not only interview the organization staff responsible for social media, but to interview constituents as well. This was important to

see whether the organization's perspective of its social media content aligned with how the constituents perceived it (Waters, 2009c). Constituent perspectives could show the effect the organization's social media may or may not be having on their decisions to financially support the organization. In addition, constituent perspectives may provide clues to nonprofit organizations on how to best provide information, recognition, and opportunities for funding its mission.

### **Interpretation of the findings**

Based on the interviews held with the constituents, social media is a part of their everyday lives.

I get up in the morning, the first thing I do is I check Facebook and see what is going on. I check it at lunchtime when I go on my lunch. Then, I check it at night a couple of times just to see what's going on, see what I've been invited to, see who is sick, who died, who is getting married, who is ... It's the biggest newspaper in the world.

-Constituent A

This statement is consistent with Lee's (2011) findings that a significant amount of the time a person spends online is spent on social media. Organization constituents also are committed to sharing information about the organization within their personal social media network. The five constituents interviewed are volunteer leaders and therefore may be more likely than the casual social media follower to interact. This is because they believe they are informed by the information they receive from the organization employees as well as through social media (Constituent C, personal communication,

February 3, 2015). The organization has a strong Facebook following, with more than 17,000 likes, and a slightly less robust following on Twitter, with approximately 1,200 followers. Both the constituent interviews and the employee interviews showed an agreement that social media is the most timely way for people to know what is going on within the organization. As stated in Chapter 4, this was noted by constituents as a benefit to following the organization's social media. Even though information is first posted to the organization website, communication is largely done through social media. Although the goals of the organization's social media are to raise awareness it seems that this goal is being accomplished.

It was determined through the interview process that the main goal of social media for this organization is to raise awareness. Increasing fundraising is a secondary priority. It was unknown at the outset of the data collection process what the main goals of social media were for the organization. However, the organization did add a donation page to its separate Ride for Kids Facebook page when it first started to get engaged with social media (Employee A, personal communication, January 13, 2015). Unfortunately, the organization did not receive a single donation through that page. Now that the organization has done a lot of work in the past 2 years to build a strong awareness presence, it could start to work to make a stronger connection between its online audience and actual donations or event participation. Levenshus (2010) also stressed the importance of offline action of online social media followers as a sign of social media success.

As stated, the long-term and secondary goal of the organization's social media is that greater awareness will lead to increased donations. One organization employee explained, "The more people engage in our mission to be donors, or to be fundraisers, or both, then we'll help move the needle closer to a cure for kids with brain tumors" (Employee E, personal communication, January 13, 2015). My interpretation of the findings is that this secondary social media goal is not something that can be truly gauged as a success at this point. The constituents note that social media helps them to recruit volunteers and raise funds for their respective fundraising events. However, this link is not yet well established, nor direct. The only small connection that has been established between social media and revenues is that Starry Night registrations were positively impacted. However, the event model used by this organization is such that it is free to register for an event. Registration does not necessarily equal a donation or revenue through constituent fundraising.

Both organization employees and constituents are on the same page when it comes to the most compelling type of social media posts. The constituents interviewed noted that they most often feel compelled to share the social media postings, or star stories, about the kids who have been diagnosed with pediatric brain tumors. The "Star" postings every Friday that highlight a child who has been diagnosed with a brain tumor are the most popular. As one constituent stated, "I would say the Star Stories definitely would be ... the most I engage with" (personal communication, February 3, 2015).

**Limitations**

Only focusing on one organization is the first limitation for this study. Different results and analysis may have been achieved by comparing two organizations. This study was also limited by the type of organization it is – a national voluntary health nonprofit. Different types of organizations, such as human services or religious organizations, may have garnered different results. One further limitation related to the type of organization studied is that it is an organization focused on a health issue specific to children. An organization focused on a disease state that occurs in late adulthood may have shown different social media interactions.

This study is also limited by its small sample size of interviewees. While this is a trademark of qualitative work (Creswell, 2007), conducting more interviews may have provided different insights into the benefits constituents realize from following the organization's social media. More constituent interviews may have also provided insight into how social media can spark a desire to make or increase a donation.

**Implications for social change**

The advent of technologies like social media are altering the relationship building process for organizations (Sargeant & Hudson, 2011). Kim and Lee (2014) stated that increasing use of social media “provides the connections” that can impact social change (p. 160). Organizations are able to have a greater impact on social change when they are able to work towards their missions, and that usually requires donations from individuals as well as corporations and foundations.

Nonprofit organizations face many economic challenges. When the American economy takes a turn for the worse, both donations from the public and from the corporate sector tend to shrink. Even when the American economy is thriving, constituents are still concerned that organizations are using the funds raised in the most efficient way possible to meet their respective missions. An organization that makes the investment in a social media presence can keep its awareness high in a cost-effective way. Rather than devoting all marketing dollars to print, television, or radio advertisements, it can direct human resources to positions that implement social media.

The constituents interviewed for the study recognized that social media was an inexpensive way to spread the word and therefore supported the organization's strategy to place a high priority on social media. "I treat Facebook like my morning newspaper... I think without Facebook, the charity itself would be nowhere near as effective in its percentage of charitable contributions, or it would just have nobody knowing it existed," (Constituent A, personal communication, January 24, 2015). If, as this constituent stated, social media has replaced the morning newspaper for some people, organizations using the various platforms to target and schedule their messages in a way that catches the eye of followers could mean increased financial support from the community.

Yet, social media as a whole may not yet be showing immediate, direct results when it comes to annual fund revenues. As one of the organization employees stated, "The difficult reality is that, and I think that this is true for other organizations too, is that Facebook is good for dissemination" (personal communication, January 13, 2015). One of this employee's roles within the organization is to review social media analytics. For

the purposes of this study, the only analytics available were those for Facebook. The organization is not at the moment collecting analytics on its Twitter account. Based on this employee's perspective, social media should not be viewed as a fund-generating tool in and of itself. So it is important for organizations to realize that implementing social media strategy will not likely equal immediate dollars.

However, social media does seem to be a good tool for expanding an organization's volunteer and event participation pool. One of the employees interviewed, whose role is to analyze social media performance, noticed that social media was showing early signs of having a positive impact participation for the new run/walk event Starry Night. Small bumps in event registrations were noticed immediately following social media posts directing constituents to the online registration page. Another employee interviewed stated that, "I do know that for our new fundraising campaign Starry Night that Facebook was our most effective recruitment tool" (personal interview, January 13, 2015). If that is the trend, nonprofit organizations may limit or even do away with traditional printed brochures that are used by many organizations as a marketing and acquisition tool to recruit participants and drive registration. These printed items can be of a significant cost when the fees for art/graphic design, printing and distribution are added up. The costs used for traditional printing could perhaps be funneled more to activities related to the organization's mission. However, social media should go beyond a marketing tool and really seek to draw people in (Men & Tsai, 2012). As one organization employee stated, regarding social media strategy, "We do our best to be proactive. We try to start conversations...and then if they've commented on something

quite often we'll go back and like their comment so they'll know that we're paying attention" (personal communication, January 2015).

Another implication for social change that was discovered through this interview process is that this organization really sees a difference between its Facebook and Twitter audiences outside of the difference in the number of followers (Facebook has a much larger following). Twitter is used as much as a tool for connecting with the media as it is for connecting with constituents. One of the unique functions of Twitter is that you can Tweet someone, including people in the media, sports figures and celebrities, directly. "There's a lot of noise on Twitter. But you also have the ability to target someone." (Employee C, personal communication, February 3, 2015). Members of the media use Twitter as a way to gather information (Moon & Hadley, 2014). Organizations that are making use of Twitter now have a direct way to share information that organizations not using Twitter do not. A Twitter connection with the media could mean heightened awareness of a particular fundraising campaign. Without that connection, organizations not using social media could be missing the opportunity to share their stories and ultimately raise funds. The implications for annual fund revenues perhaps could be traced back to an increase in event participation or to an increase in donations after connecting with a member of the media through Twitter.

A final implication of social change is that fundraisers need to possess different skills in order to harness the social media activity going on within the organization in which he or she works (Miller, 2009). As evidenced by the information collected in the interview process with PBTF, the communications team had a much better handle on

what was going on with its constituent base on social media than the development team. This is to be expected as the communications team is handling the implantation of social media. However, fundraising professionals should also be part of the conversations on strategies and analysis so that he or she can be well informed when connecting with donors at any level.

### **Recommendations for action**

Information was an emerging code through the interview process. This seems to be because the organization is using social media largely as way to disseminate information. As stated in the interviews, social media has only really been widely used in the organization in the last two years. As was also stated, “I think the conversation, you know, is not as vibrant as we would love it to be because we can't be on it twenty-four hours a day, but we do find that some people do seem to be more engaged than others.” With all of that in mind, I would recommend that the organization find a way to have a second person trained to monitor social media.

This recommendation is also made as the organization seems interested to expand its social media presence with emerging platforms. Instagram is a platform of which the organization would like to make better use, and one constituent as an opportunity for expanding social media presence noted it. An employee also mentioned there are opportunities to make more use of Instagram especially as it pertained to event pictures. The organization has a Pinterest account, but that platform does not have the same robust following as the organization's Facebook page or Twitter account. Additional social media platforms will continue to be developed and the organization will want to make

sure it is equipped to be where the conversation is. These different platforms could increase the entertainment value of the organization's content which has been cited as one of the main reasons people use social media (Taylor et al., 2011)

Another recommendation for the organization to consider is coding constituents in its database as social media engagers. The interviews with employees showed that there is not a concerted, or "intentional," offline engagement of its online audience unless a specific question is asked (Employee D, personal communication, January 13, 2015). The coding could begin with those who ask a specific question of the organization through social media. Most of the questions asked are from families seeking support to deal with a pediatric brain tumor diagnosis (Employee B, personal communication, January 13, 2015). Another way to begin the coding process could be to code those who have been consistent "likers," "sharers," or "retweeters." One employee used the designation of "power user" (personal communication, January 13, 2015). If the organization could make a stronger connection with its power users it may see more offline engagement of its online audience.

A final recommendation for the organization is to work to add in scheduled recognition posts for those who are helping to advance the mission of the organization offline. Those individuals could be researchers, physicians, national corporate sponsors, volunteer leaders, third-party event organizers or those who participate in endurance events. This could start as a monthly posting that is focused on recognizing those who champion the cause of the organization in their local communities by fundraising. This could also be beneficial as the organization is just now starting to create a nationwide

chapter network. Doing more recognition at the national level could help to build a strong local presence especially in the areas of the country where the organization is developing chapters.

### **Recommendations for further study**

The organization selected for this study is a national, voluntary health organization that focuses on a disease that impacts children. Future studies should focus on organizations of a different scale and focus. For example, how does social media impact annual fund revenues for an organization that serves the homeless or victims of domestic violence? There may not be the same compelling visuals, like the “star stories” which were noted to be the type of post shared the most, to help tell the organization’s story. It is those compelling stories of the “stars” that were noted by each constituent interviewed as the type of post they share the most within their personal social media networks.

This study also only focused on two social media channels: Facebook and Twitter. Facebook continues to be the most widely used social media platform, but other platforms are gaining traction. PBTF is looking to make more use of Instagram in the future particular around its Ride for Kids motorcycle event and new Starry Night walk event (Employee A, personal communication, January 13, 2015). Future studies should focus on the impact of Instagram (Hansson et al., 2013), YouTube and other emerging social media platforms yet to come.

The final recommendation for future studies would be for more long-term examination to see when someone first connects with the organization through Facebook

and what the length of time is for the organization to receive its first financial contribution from that individual. This recommendation was born out of the conversations had with the employee whose role is the analysis of the social media for PBTF (Employee A, personal communication, April 12, 2015).

### **Reflection on the research process**

The research process was smooth in terms of coordinating with the organization. The access to the organization was open due to a professional relationship with the president and CEO. The employees of the organization were also very open, accommodating, and willing to speak and share information with me. While it was more work for them, the employees were very concerned that enough constituents were recruited for interviews.

Interviewing constituents was a slightly rockier process. It took a few emails from the organization to its social media “power users” to obtain the necessary consent forms. Once the consent forms were received, it was then a further challenge to set up the interview time and to have constituents call into the conference line. Constituents were willing to be interviewed, it was a matter of coordinating schedules. In addition, not all constituents check their personal email frequently so at the time of the scheduled interview, I had to call the constituents to give them the conference call information that I had emailed. However, once we were both dialed in the constituent interviews went well.

A further hiccup occurred when the conference line was not working for one of the constituent interviews. There was an issue with the constituent calling in from his cell phone and he had no other line on which to call me as he was driving home from work.

To be respectful of the constituent's time, I conducted the interview without using the conference call line. It had been difficult to find a good time for the call, so I decided in the interest of time to do the interview that way.

### **Conclusion**

Does social media affect this organization's annual fund revenues? The answer arrived at from the information collected through this study is that it does not affect annual fund revenues in a direct way. The organization has been able to track increases in event registration for its new Starry Night run/walk event back to social media postings. However, since both event models used by the organization are such that someone can register for free without having to make any personal contribution or do any fundraising, it is unclear if those registrations translate to actual revenue. Event registrants may go on to perhaps make a donation and/or fundraise within his or her circle of influence, but it is not a requirement for participation. Those event registrants and donors are then funneled into the organization's main database and into non-event fundraising vehicles such as direct mail and fundraising eblasts. Eventually they may become donors or event fundraisers. However, it is not yet clear if postings not related to event registration, such as those asking for a direct donation are having a positive impact on non-event revenue.

An unexpected finding through these interviews was that social media can be a way to connect someone in need to the organization. One constituent talked about a coworker whose child was diagnosed with a brain tumor after participating in the local Ride for Kids event. The interviewee found that sharing information about the organization directly to this person through social media worked well. "It's a really easy,

non-threatening way to engage somebody like that with the Foundation” (Constituent C, personal communication, February 3, 2015). Social media not only shares organization information, but also shows how it helps others by constituents responding and making their own comments. That is one way that social media works the other way – first a donor then a user of services. So this case is an example of social media indirectly impacting annual fund revenues. People may take advantage of its services learned about through social media and then become a donor.

Yet it is still important to note that organizations need to know that implementing a social media strategy involves more than simply opening accounts on whatever platforms it deems to be most in line with its audience or what seems to be most popular. There is an education process not only with the organization employees, but also with key volunteer leaders. One employee acknowledged in her interview that there have been times where a conversation was happening on social media during which organization volunteer leaders were sharing incorrect information. As that interviewee stated, “...that’s still an ongoing challenge is to figure out how can, even with our volunteer base, even with our own employees, how do you make sure that everyone has the most up-to-date information and that it's accurate?” (Employee C, personal communication, January 13, 2015). So it is not simply enough to have an online conversation happening about your organization. There is an ongoing monitoring and training process to make sure that key volunteers have the correct information.

Organizations looking to implement a social media strategy, or strengthening the one in existence, should be fully aware that it will not likely result in immediate increases

in annual fund revenue. If the organization currently has events as part of its fundraising portfolio, it should use social media to help promote those events. There is evidence that social media can help to increase event registration. Organizations should also consider goals for each type of social media platform. As found in this study, Twitter is a tool that helps PBTF connect with the media almost as much as constituents. Finally, a social media presence should be seen as part of an integrated communications and fundraising strategy. Although its effect on annual fund revenues may be indirect, social media is quickly becoming the method most people use to obtain information.

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## Appendix A

## Email to Constituents for Study Participation

The Pediatric Brain Tumor Foundation has agreed to participate in a research study about a nonprofit organization's use of social media and how it impacts annual fund revenues. As a constituent who frequently interacts with the PBTF, we think you could help by talking about your social media experience for this study.

Participation in this study is voluntary, and you may withdraw from this study at any time if you do choose to participate.

The consent form for the study is attached. You will also receive a copy at the Volunteer Leaders Conference this weekend. Please read the form carefully, then sign and return it to us if you are willing and able to take part in this study. You can give us your form at the conference or email it to us by Friday, Jan. 23, 2015.

Once we have received your consent form, we will send it to the researcher, who will then contact you to set up a brief phone or email interview.

Thank you for your consideration.

National Director, Ride for Kids  
National Development Director  
Pediatric Brain Tumor Foundation  
302 Ridgefield Ct.  
Asheville, NC 28806

## Appendix B

## Research Questions for Organization Employees and Constituents

<b>Research Questions</b>	<b>Related Interview Instrument Questions for Organization Employees Responsible for Social Media</b>
1. How are relationships, built and maintained through social media sites, such as Facebook and Twitter, affecting an organization's annual fund revenues?	<p>Question 1: What are the organization's goals for social media?</p> <p>Question 2: What are the organization's annual fund activities?</p> <p>Question 3: How would you describe the organization's interaction with its social media audience?</p> <p>Question 4: How do you engage with those you find are regular participants, those who often comment on a Facebook post or reply to a Tweet?</p> <p>Question 5: Thinking about the organization's fundraising events and goals, how do you talk about opportunities to financially support the organization on Facebook and Twitter?</p> <p>Question 6: Could you describe a time when you worked with the organization's development department for offline engagement of a regular social media participant?</p> <p>Question 7: Have there been times where you have personally recognized donors or other high level supporters of the organization's events? If so, what was the response from the social media audience? If not, why not?</p> <p>Question 8: Within the organization's database, are constituents identified in any way as social media participants?</p>

Research Questions	Related Interview Instrument Questions for Organization Employees Responsible for Social Media
<p>2. How do donors who interact with the organization through social media sites feel about their access to the organization's current awareness and fundraising campaigns or current research initiatives?</p>	<p>Question 1: How does the organization determine constituents' level of knowledge about the organization's awareness and fundraising campaigns and current research initiatives?</p> <p>Question 2: What kind of questions do you receive through social media from constituents?</p> <p>Question 3: How often does the organization receive requests through social media for more information about fundraising activities?</p> <p>Question 4: Have there been times when the organization communicated information related to awareness and fundraising campaigns or current research initiatives solely through social media? If so, how was the information received. If not, how else was the information communicated?</p> <p>Question 5: What is your sense of donors' level of knowledge about the organization overall? Is there a difference in knowledge between donors who connect with the organization through social media versus those who do not?</p>

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<b>Research Questions</b>	<b>Related Interview Instrument Questions for Organization Employees Responsible for Social Media</b>
3. What, if any, benefits do donors personally feel they get from following this organization's social media?	Question 1: Are there any kind of special promotions you have offered to constituents who interact with the organization through social media that are not offered to constituents who don't follow the organization's social media?  Question 2: Do you have specific communications that those not following the organization on social media are missing?  Question 3: When there is breaking organizational news, what role does social media play in communication plans?  Question 4: Have there been times when you have used social media as a recognition vehicle for donors?

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<b>Research Questions</b>	<b>Related Interview Instrument Questions for Organization Employees Responsible for Social Media</b>
4. In what ways have donor interactions with the organization through social media influenced the decision to give as well as the level of the gift?	Question 1: Have you ever attributed an increase in giving or event registration to a social media post or series of posts? If so, can you describe the content?  Question 2: Are there instances that you can recall in which a constituent made first contact with the organization through social media and then made an annual fund gift?

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Research Questions	Related Interview Instrument Questions for Organization Constituents
<p>1. How are relationships, built and maintained through social media sites, such as Facebook and Twitter, affect an organization's annual fund revenues?</p>	<p>Question 1: How long have you been interacting with the organization's social media (through Facebook or Twitter)?</p> <p>Question 2: What is your understanding of the organization's mission and the work that it does?</p> <p>Question 3: Why did you first engage with the organization through social media? Why do you continue to interact?</p> <p>Question 4: When you started regularly connecting with the organization through social media, did it change your feelings on the organization? If so, how? If not, why?</p> <p>Question 5: Do you think that the knowledge you have of the organization gained from its social media content impacts your decision to financially support it? If so, could you describe how?</p> <p>Question 6: What particular topics do you find yourself drawn to on Facebook or Twitter? Do you find yourself responding to or commenting on any topics in particular and if so, what are some of those topics?</p> <p>Question 7: How do you think PBTF uses the funds raised to meet its mission?</p>

Research Questions	Related Interview Instrument Questions for Organization Constituents
<p>2. How do constituents who interact with the organization through social media sites feel about their access to the organization's current awareness and fundraising campaigns or current research initiatives?</p>	<p>Question 1: What are some of the awareness and fundraising campaigns you are familiar with through social media?</p> <p>Question 2: Have you become involved in any awareness and fundraising campaigns because of the knowledge you gained through social media? Why or why not?</p> <p>Question 3: What is your understanding of the organization's research focus? How did you come to that understanding?</p> <p>Question 4: How would you describe your level of access to organization information because of your connection through social media?</p>

Research Questions	Related Interview Instrument Questions for Organization Constituents
3. What, if any, benefits do constituents personally feel they get from following this organization's social media?	<p data-bbox="634 365 1276 432">Question 1: What benefits has interacting with the organization through social media provided you?</p> <p data-bbox="634 474 1435 579">Question 2: Do you share PBTF content within your personal network through Facebook, or retweet through Twitter to your followers? If so, what compels you to share or retweet?</p> <p data-bbox="634 621 1393 800">Question 3: Can you describe a time when information you gained through Facebook or Twitter changed the way you personally faced the impact of a pediatric brain tumor or changed the way you help your loved one face a pediatric brain tumor diagnosis?</p> <p data-bbox="634 842 1369 942">Question 4: Are there other ways that you learn about the activities of the organization? If so, what are those other channels?</p> <p data-bbox="634 984 1419 1129">Question 4: Have you realized any other benefits from engaging with this organization through social media? Has engaging with the organization through social media allowed you to expand your personal or professional network?</p> <p data-bbox="634 1171 1411 1272">Question 5: If the organization, hypothetically, disbanded its social media, how else might you connect with the organization and keep informed of its activities?</p>

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<b>Research Questions</b>	<b>Related Interview Instrument Questions for Organization Constituents</b>
4. In what ways have constituent interactions with the organization through social media influenced the decision to give as well as the level of the gift?	<p data-bbox="638 401 1308 470">Question 1: What influences you to make a financial contribution to an organization?</p> <p data-bbox="638 512 1422 688">Question 2: Do you interact with other organizations you financially support through social media? If so, how would you describe that interaction? If you do not interact with other organizations you financially support through social media, why not?</p> <p data-bbox="638 730 1422 835">Question 3: How would you describe your financial contribution decision-making process when asked to support an organization you have never supported before?</p> <p data-bbox="638 877 1422 1018">Question 4: Could you describe a time when reading a Facebook post or a tweet compelled you to make a financial donation you were not planning to make, or compelled you to increase the amount of your financial gift?</p> <p data-bbox="638 1060 1422 1203">Question 5: Could you describe a time, regarding this organization or another nonprofit, when information you gathered about the organization caused you to decrease your financial gift or to not give a gift at all?</p>

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## Appendix C

## Example of Post Interview Memo

Contact Type: Conference call line

Site: 712-775-7031

Date of Interview: 1/24/2015

Today's date: 2/1/2015

Written by: KLM

1. What were the main themes that arose from this interview?

The main reason for using Facebook is for social purposes. This constituent only follows a few specific groups on Facebook.

With this organization's site, the constituent is looking to find ways to get better at fundraising and spreading the word.

If people want to spread the word about anything, they need to put it on Facebook.

"I treat Facebook like my morning paper."

2. Summary of the information gathered in this interview pertaining to the research questions?

Relationships built thru social media:

It's hard to say if this constituent has a strong relationship with the organization largely because of social media. This constituent lives in the same geographic location as this organization and that may play more of a role in the strength of the organization-public relationship.

In this particular case, social media may help to strengthen the relationship but the close proximity of the organization to the constituent likely plays a bigger role in that strong relationship.

Donor/constituent level of knowledge:

This constituent feels he has a high level of knowledge. This is partially because of Facebook, and also because this constituent is a volunteer leader.

Donor/constituent perceived benefits thru social media:

Those following the Facebook page have much greater access to information than those who rely on traditional marketing.

So far, the constituent has noticed he's been getting more information through his interaction with the organization's social media than participation in his local event. Sees recruitment and participation as a future benefit.

Donor/org. social media interaction influence on giving:

This constituent feels that without social media, the organization would be nowhere near as successful in collecting charitable contributions.

For this person, social media only works with organization's in which he has a strong conviction, that have done a good sales job (though not through telemarketing), and on which he has done research on their financials.

However, a story of an individual needing assistance, from within his own social circle, read on social media has compelled him to give a financial contribution in the past.

3. Anything else thought provoking that came up during the interview?

The constituent believes that if the organization did not have a social media presence, no one would probably know about it because they don't do any advertising for the organization.

The constituent also noted that social media is an inexpensive way to spread awareness.

4. Any new questions for future contacts with the constituent?

Not at this time.

## Appendix D

## Week of January 26, 2015 PBTF Facebook Insights Report

Post Message	Type	Posted	Lifetime Post organic reach	Lifetime Post Consumers
Kimberly Carter's son, Armani, story	Photo	01/30/2015 05:30:00 AM	6,356	341
bid on this Acura TLX hood signed by your favorite celebs at the Sundance Film Festival	Photo	01/29/2015 01:22:52 PM	4,996	741
Childhood brain tumor survivor George Plym donates check from WNC Brain Tumor Support	Photo	01/29/2015 12:46:54 PM	7,212	206
Survivor and scholar Brianna Butler	Photo	01/28/2015 11:43:03 AM	9,652	307
Scholar quote from Andrew Blumberg	Photo	01/27/2015 11:42:59 AM	11,968	568
Scholar quote from Amy Brinton	Photo	01/26/2015 05:26:44 AM	5,462	288