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RETENTION ISSUES IN NONPROFIT UNIVERSITY FOUNDATIONS

A dissertation submitted to
the Graduate College of
Marshall University
In partial fulfillment of
the requirements for the degree of
Doctor of Education

In
Leadership Studies

by

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APPROVAL OF DISSERTATION

We, the faculty supervising the work of **Sarah Kay**, affirm that the dissertation, **Retention Issues in Nonprofit University Foundations** meets the high academic standards for original scholarship and creative work established by the EdD Program in **Leadership Studies** and the College of Education and Professional Development. This work also conforms to the editorial standards of our discipline and the Graduate College of Marshall University. With our signatures, we approve the manuscript for publication.

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ABSTRACT

Turnover of major gift officers (MGOs) within university foundations has been a problem for foundations and their affiliated universities. Turnover of MGOs results in less fundraised dollars, fewer donor-fundraiser relationships, and higher incoming costs. Retention of MGOs is vital for foundations' success and directly correlates to the overall prosperity of the respective university. The purpose of this descriptive, non-experimental study that utilized a cross-sectional survey design was to examine perceptions of currently employed MGOs, in the interest of determining what was important to them to remain employed at their nonprofit university foundation. Using a web-based survey, data showed MGOs need to feel appreciated and valued within their foundations. They were in pursuit of more responsibility over the fundraising strategies and their longevity in their position was dependent on their work culture. Data also found older MGOs are mostly intrinsically motivated, less motivated by compensation, and most likely to stay employed. The perceptions of work culture, perceived value, and workplace environment provided by the currently employed MGOs may provide a better understanding for employers to retain MGOs.

CHAPTER 1

Low retention in nonprofit foundations has been an ongoing issue for organizations since their inception in the Progressive Era, 1897-1920 (Muslic, 2017). While the concept of “giving back” has existed throughout history, nonprofit organizations in the United States have had a relatively short history. The Progressive Era revolutionized fundraising; with an increase of wealth, the country saw a direct correlation with an increase in benevolence to communities (Muslic, 2017). The increase of benevolence and understanding of philanthropy gave way for the creation of university foundations.

University foundations are independent non-profit 501(c)3 organizations that exist exclusively to support the universities they are concomitant with (Council for the Advancement and Support of Education [CASE], n.d.). Foundations work hard to receive, invest, administer and disburse private resources to support the university. The fundraising efforts and gifts to university foundations add a margin of excellence that supplement the level of state support, federal funding, tuition income, and auxiliary service revenue. Such efforts are not created to replace state and federal funds (Marshall University Foundation, 2011), but rather to add to the coffers to grow the endowment, help donors establish their legacies, and ultimately financially assist students.

Universities rely on foundations’ perseverance to maximize continuous financial support. Foundation success with building private support results in a larger endowment pool for research, learning, and student support (CASE, n.d., para 1). The process of fundraising revolves around relationship management. The careful cultivation of donor prospects takes time and is a meticulous process that, when executed correctly, has the ability to change the face of the

university, financially assist students, and enable them to reach their academic dreams that can transform their lives.

University foundations are dedicated to benefiting the university, their core responsibilities are found on every foundation website and clearly outlined by CASE (n.d). The common themes of responsibilities are outlined below and serve as the crux of university foundations' purpose (CASE, n.d.):

- generate philanthropic support for students, faculty, research, infrastructure, academic, and vocational programs;
- raise and manage private support for benefit of the university and the community it serves;
- create relationships and engage with alumni and “friends of the university” in hopes of creating potential donors;
- advise and guide donors, and connect institutional priorities with donor interests;
- act as an advocate for the donor and university; create opportunities for workforce engagement; and
- support program innovation and advancement.

The core responsibilities outlined above rely on meaningful relationship management between donor prospects and major gift officers (MGOs). Major gift fundraising is centered on creating trust between the donor and the university. An MGO acts as a fiduciary for the university and donor prospect; the success and tenure of the MGO affects the overall success of the foundation and university. The focus of a major gift fundraiser is always the donor, and a successful fundraiser will realize that success stems from an enduring relationship. Major gift fundraising for nonprofits such as university foundations is a long-term game; therefore, it is

vital that MGOs stay employed at a university for a long period to both reach their full potential as a fundraiser and maximize the donation. University foundation finances and retention of MGOs for fruitful donor management and fundraising are the lifelines of a university. The private support that is generated from the foundation and its management of donors allows universities to prosper. Trust is created by lasting relationships that align the donor's desires with the university's needs. Nonprofit organizations should look to the past as an indicator for changes in the industry as every new decade brings new principles, ideas and practices that change and affect the nonprofit sector (Muslic, 2017).

There is a need to ensure retention of MGOs and the development of lasting relationships between donors and the university through the foundation. This study will research currently employed MGOs and their experiences in nonprofit university foundations with the hope of learning more about retention rates in nonprofit foundations and to improve retention. To do that, this brief review of literature will focus on office environment, culture, expectations, training, and feelings of value within a nonprofit organization.

Preliminary Review of the Literature

While a full review of the literature is provided in Chapter Two, the following preliminary examination of literature outlines the grounding for the study. Current research is divided into four broad categories: economic contributors to the reductions in funding for university foundations, the role of university foundations, the role of the major gift officer (MGO) and the cost of losing employees.

Economic Contributions to the Reductions in Funding for University Foundations

Economic contributions to the reductions in funding for university foundations can be broken into two segments: recession-related consequences for foundations and the Covid-19 pandemic-related problems.

Recession-Related Problems

The federal government and the states have provided substantial financial support for higher education since the inception of The Higher Education Act of 1965 (HEA) (Kagan, 2022). HEA is a regulation established to strengthen the educational funds of public universities and colleges (Kagan, 2022). While funding is still provided, contributions have dwindled throughout the years and are subject to volatile markets. Tandberg and Laderman's (2018) research takes into account inflation and student enrollment and concludes state budgets have not kept pace. Their research indicates state funding in 1992 was \$81 billion, but in 2017 was \$94 billion (adjusted for inflation). This increase of only 17% is worrisome considering the 36% increase in full-time equivalent enrollment (FTE). To clarify, FTE is the measurement of full-time students calculated by the sum of all student credit hours divided by the number of credit hours required to be a full-time student (Tandberg & Laderman, 2018). In short, this figure represents a loss of \$660 per FTE since 1992 (Tandberg & Laderman, 2018). While many look to the Great Recession of 2008 as the starting point for the decline in higher education budgets, it must be noted that states have been cutting funding since before the 2000 stock market crash, which was a direct result of the dot-com bubble burst (Hayes, 2019). The dot-com bubble originated in the 90s with venture capitalists heavily investing in internet-based businesses (Marticio, 2022). Low-interest rates in 1998 made the capitalization in internet-based startups possible (Tucci, 2014). To give an idea of how much was invested in internet startups, the National Association of

Securities Dealers Automatic Quotation System (NASDAQ) rose from under 1,000 to 5,408.60 between 1995 and 2000 (Tucci, 2014). The burst occurred in 2000, as businesses were starting to declare bankruptcy and investors realized the business models were not sustainable, thus an exodus from the market caused the market recession in the early 2000s (Marticio, 2022).

The dot-com bubble burst and the Great Recession have both contributed to steadily decreasing appropriations for higher education budgets (Tandberg & Laderman, 2018); as a result, the public higher education budget is historically low (Whitford, 2021). In 1988, states provided a quarter of state higher education revenue and students provided the remaining quarter (Mitchell et al., 2019). Mitchell et al., (2019) report that in 2018, due to state budget cuts, students made up 50% of public university revenue. They also reported the overall state funding for two-and four-year colleges in 2018 was \$6.6 million below what it was in the months preceding the 2008 recession (Mitchell et al., 2019). This overall state funding cut to higher education led to a rise in tuition, reduced academic opportunities, and fewer student services (Mitchell et al., 2019).

The need for university foundations to offset education expenses for students is especially important as employer tuition assistance, a long-time established education benefit, has declined over the years. While reductions started to occur in the early 2000s, the 2008-2009 economic recession hastened the process; companies pulled back on tuition assistance and the assistance from companies has not rebounded (Merrick, 2019). The Society for Human Resource Management's (SHRM's) 2018 Employee Benefits Survey reported that 51% of respondents said their companies offered undergraduate educational assistance. This percentage of participants who said their companies offered assistance is 66% less than what was reported

before the economic crisis, and similar statistics were stated for graduate assistance (Merrick, 2019).

Making matters worse for individual higher education budgets, the average family income has decreased by 3% over the last few years (Bhutta et al., 2020). According to the United States Census Bureau (2021), 44% of students or prospective students from households averaging a family income of \$75,000 planned to cancel their college education aspirations due to lack of funding. This percentage emphasizes the necessity for need-based aid provided by university foundations (Jackson & Saenz, 2021).

Philanthropy is susceptible to volatile markets, and if historical results from the aftermath of the 2000 stock market crash and the Great Recession are any indication, universities must look for alternative ways to grow their endowments to survive a financial crisis. As standard supplemental support for higher education decreases and the cost of education continues to rise, foundations become essential to grow these endowments and bridge the gap in funding that is formed in their absence (Drezner, 2011).

Pandemic Related Problems

Consequently, as the aftermath of the Covid-19 pandemic is not clear, market volatility should be expected, and current students should not rely on future employer assistance programs to offset their college expenses (Merrick, 2019). Students will likely rely more than ever on private donations fostered from university foundations to assist with college expenses (McCluskey, 2017).

The 2021 Higher Education Community Report for Advancement highlighted the need for foundation assistance for students who have suffered from the consequences of the Covid-19 pandemic. A survey study produced by Temple University shed light on student pandemic-

related hardships: nearly 60% of college students surveyed were dealing with either uncertainty related to food or housing or homelessness (Blackbaud, 2021). Facing hardships, students relied on university foundations to offset expenses; however, due to the pandemic, a decline in face-to-face visits, proposals presented and solicitations made resulted in an overall decline in major gift fundraising (Blackbaud, 2021).

The National Student Clearinghouse Research Center published a report on student enrollment for the fall of 2020. The results showed a decline of 2.5% of overall college enrollment due to the Covid-19 pandemic (St. Amour, 2020). For perspective, that equates to 400,000 students who chose not to attend college this fall, which is double the decline in the 2019 figures (St. Amour, 2020). This decline in student enrollment poses concern for universities, as they rely on student enrollment for revenue. As stated above, students, tuition and fees, account for about 50% of university revenue (Mitchell et al., 2019). The decline in student enrollment is also a concern for overall national economic prosperity as fewer students enroll, fewer individuals attain higher education. This too puts pressure on foundations to perform (St. Amour, 2020). Since the Covid-19 pandemic, 27 states have pushed for higher education budget cuts to public universities and colleges (Jackson & Saenz, 2021). Further budget cuts, lower enrollment numbers, and lowered household income are problematic for university prosperity and result in universities relying on foundations to offset expenses and leverage revenue.

The Role of University Foundations

Hall (1992), noted that “[n]o single force is more responsible for the emergence of the modern university in America than giving by individuals and foundations” (p.403). George Peabody is credited with the creation of the first educational foundation (*Peabody Journal of Education*, 1994). After traveling to the South after the Civil War, Peabody was concerned with

the poverty he witnessed. The creation of The Peabody Educational Fund in 1867 was to integrate ex-slaves and poor whites of the South to foster industrial and intellectual education (Ohio University, 2020). Before being consolidated by other foundations, The Peabody Educational Fund distributed around \$4 million for scholarships, training of educators, and assisting with the construction of schools. The creation of The Peabody Educational Fund paved the path for future foundations to assist educational reveries for students and educators.

The first half of the 20th century saw the establishment of foundations affiliated with four-year public universities (Council for the Advancement and Support of Education [CASE], n.d.). KU Endowment, created to support the University of Kansas, was established in 1891; it was the first university foundation (CASE, n.d.). Since then, it is estimated that 2,000 foundations have been created to support institutions of higher education (Gibbs & Bryne, 2019).

In the United States, foundation culture was influenced by Andrew Carnegie (Chambers, 2015). Carnegie recognized the responsibility of the ultra-wealthy to spread their wealth for the betterment of communities, organizations, and country. Carnegie provided the funds for many institutions to be endowed and was followed by other philanthropists such as Henry Ford, John D. Rockefeller, and Bill and Melinda Gates (Chambers, 2015). University foundations benefited and continue to benefit from the big names in philanthropy, but also rely on the “average” graduate, as “every dollar counts” to grow the coffers of the university (Williamson, 2018).

The National Center for Education Statistics (NCES) published a report on the largest university endowments in the United States for the 2018 fiscal year. Harvard University, The University of Texas System, Yale University, Stanford University, and Princeton University were the top five, totaling an endowment pool of \$150 billion; the total endowment pool of university endowments is \$648 billion (National Center for Education Statistics [NCES], 2021).

With endowment pools in the billions, it is clear that university foundations are vital for the operations of the universities they are affiliated with and are responsible for the careful management of investing funds to grow the endowments for perpetuity.

University-affiliated foundations can operate under memoranda of understanding (MOU) from their respective university that describes their role, responsibilities, and overall collaboration efforts, while others abide by a set of bylaws and agreements that specify the relationship and role between the university and the foundation (The University of Texas System, 2013). Foundation organizational structures vary; however, their responsibilities remain the same: university foundations must be transparent, have an aligned mission with their affiliated university, implement gift acceptance policies, and honor donor intent, as well as recognize relationship practices that assure exemplary governance of activities (The University of Texas System, 2013). The role of the university foundation is the same throughout institutions. University foundations are tax-exempt charities that are separate legal entities from their affiliated public higher education institutions. The university foundation's sole purpose is to support the institution with which it is affiliated, and the university relies on the foundation to receive, spend, and invest donations to grow the university's endowment (McCluskey, 2017).

The Role of Major Gift Officer

To better understand the retention problem, the position of major gift officer (MGO) should be defined. As outlined by university foundations across the board, MGOs are responsible for qualification, cultivation, solicitation, and stewardship of major gift donors. Major gift donors include alumni, friends of the university, community members, individuals with an affinity toward the institution, current faculty, and staff, retirees, organizations, businesses, as well as private foundations as assigned by the university foundation employing the MGO. MGOs hold

essential development positions within the university foundation team, working in concert with all foundation staff in creating and increasing philanthropy opportunities for fundraising initiatives, scholarship creation, and fundraising events (Council on Foundations, n.d.).

Ultimately, the MGO acts as a facilitator, matching university funding priorities to the donor's interests and building community partnerships through their ability to create meaningful relationships between the institution and the donor. As defined by Perry (2015), the key responsibilities of MGOs are as follows:

- manage a portfolio of potential donor prospects;
- create a plan to qualify, cultivate, solicit and steward donor prospects;
- work collaboratively with university foundation and university to establish fundraising initiatives;
- develop and implement strategies for creating and maintaining long-term fundraising relationships with donor prospects;
- create contact reports for interactions with donor prospects; and
- monitor expenditures against approved budget.

This research will focus on the retention of MGOs to help build the reserves of the university foundation, offset state budget cuts, and assist students. The author of this study previously conducted a pilot study to examine turnover in nonprofit university foundations, utilizing the phenomenological study method (Kay, 2020). The pilot study identified common themes from six research participants who were currently employed at a nonprofit university foundation or had recently voluntarily left. The participants shared similar experiences in their foundations, and the results shed light on many areas within university foundations that need to improve in order to retain MGOs. The main themes yielded from the data were communication

problems within the foundation, a perceived lack of value of MGOs to the university foundation, as well as an absence of clear organizational goals, leaving the MGOs unsure of their role (Kay, 2020). When asked about turnover rate of their MGO coworkers, the participants confirmed the turnover rate (i.e., the average longevity of the employee) of their coworkers was between 18 to 24 months. This is on par with the national average tenure of an MGO at a nonprofit university foundation, which is less than 18 months (Bakker, 2017; Burk, 2013; Nagul, 2020; Rizkallah, 2020). Veritus Group suggests MGO turnover is closer to two years (Perry & Schreifels, 2019), and while the time varies, MGO turnover falls between 16 to 24 months on average, resulting in a clear retention problem.

The most prominent challenge to nonprofit organizations, in fact, is employee turnover (Hrywna, 2019). ExactHire.com reports the turnover rate of employees who intend to resign for nonprofit organizations is 19% annually, 7% higher than the for-profit sector (Strub, 2020). The 2019 Nonprofit Organizations Salary & Benefits Report reflects similar turnover results (Hrywna, 2019). The 2019 Nonprofit Talent Retention Practices report shared that 22% of voluntary turnover in nonprofits is due to disengagement and dissatisfaction with current leadership (NonprofitHR, 2019). Feeling valued in the organization also has a direct relationship to the longevity of the employee (Seppälä & Cameron, 2015; Van Scheers & Botha, 2014). While these percentages represent nonprofit organizations in general, the nonprofit university foundation sector suffers similar turnover results (Grubaugh, 2019).

There are a variety of reasons that MGOs plan to leave their current positions; however, in light of previous research, a number of common themes have emerged. MGOs cite limited experience, lack of training, poor compensation, perceived lack of value, and unrealistic expectations as reasons for not being successful in their roles (Joslyn, 2019; Meyer, 2020; Papp,

2019; Schoshinski, 2017; Towner, 2019; Witters & Agrawal, 2015). Thomas (1996) reports career growth, title promotions, and compensation as reasons MGOs change jobs so frequently. The industry average for MGOs to reach potential (i.e. the successful creation of donor and MGO relationships and the MGOs working understanding of fundraising) within their organizations is two to three years (Grubaugh, 2019), which clearly poses a problem for university foundations. If MGOs aren't staying long enough to reach their potential, donor relationships are impeded and benevolent revenue potentially hampered (Grubaugh, 2019). Penelope Burk (2013), President of Cygnus Applied Research Inc. and author of *Donor Centered Leadership*, spent five years researching 120,000 fundraisers for answers into the dynamics of fundraising and the related industry problems and reports 64% of fundraisers listed compensation as the number one reason for leaving their positions. In her blog posts "Why fundraisers leave" (2009) and "Thank goodness the weekend is over" (2014), she notes additional problems fundraisers experience, such as inflexible work hours, unclear organizational goals, absence of acknowledgement, and perceived lack of value. Burk (2013) reinforces the aforementioned statistics that fundraisers are staying in their jobs, on average, 16 months. Furthermore, 34% of Burk's research respondents were actively planning to leave their jobs while they were participating in the study. As for future concerns in the industry, 90% of MGO managers reported that turnover was a problem for their organizations (Burk, 2013).

Cost of Losing Employees

The data vary, but the consensus is MGOs change their jobs every 1.8 to 2.3 years (Perry & Schreifels, 2019). Major gift fundraising is founded on the ability to create meaningful relationships between the university foundation and its donors. Perry and Schreifels (2019) emphasize that low retention is not purely a financial problem but results in a loss of the

relationships created by the MGO, as well. Giddens (2020), too, focuses on relationships in examining high turnover and highlights the golden rule of fundraising: “people give to people.” With 1.6 million tax-exempt organizations in the United States (Independent Sector, n.d.), university foundations compete with such organizations as food banks, disaster-relief organizations, and churches. If MGOs at nonprofit university foundations do not stay long enough to create and maintain meaningful relationships, one of the other organizations might swoop in and attract donors to their causes.

As Shakeel (2018) correctly points out, not all turnover is bad. In fact, some scholars agree that turnover is healthy for the economic progression of businesses (Glebbeck & Bax, 2004; Gartenstein, 2019). The concern is with organizations that are experiencing high turnover, losing talented employees that leadership cannot easily replace (Purvis, 2021). For nonprofit university foundations with high turnover rates, the direct cost of employee recruitment and training add up, and these losses are not sustainable when the cycle of turnover is repetitive. The Center for American Progress (CAP) reports the cost of replacing employees is 213% of their annual salary (Purvis, 2021). Boushey and Glynn (2012) report the same figure for the replacement of an MGO. This figure increases with years worked and previous experience, but for this study’s sake, 213% is the average replacement cost for an MGO in the university foundation nonprofit sector. Bersin (2013) estimates the cost is closer to 1.5 to 2 times the employee’s annual salary. This figure includes hiring costs, onboarding expenditures, lost productivity, loss of engagement, and the cultural impact associated with a revolving door of employees (Bersin, 2013). Bersin (2013) considers job fit, career-advancement opportunities, and work environment as the most important factors in retention.

Perry (2019) points to a scenario where MGOs take donor information and the cultivated relationship with them to a new competing nonprofit organization. While this practice is neither appropriate nor ethical, it does happen. This is especially worrisome for nonprofit organizations that operate in the same county or geographical area, as donors often overlap. The cultivated relationship between the MGO and donor is an asset for the organization and should belong to the organization. An MGO who feels slighted by their current organization has the ability to jeopardize the donor's relationship with the institution (Perry, 2019).

Clearly, the replacement expenses are high and are indicative of the importance of retaining employees at nonprofit university institutions. Boushey and Glynn (2012) emphasize that this is only the financial implication stemming from costs sunk on training, replacement, and covering the vacant position. The indirect costs that stem from poor retention are the loss of productivity for the employee who spends their last few weeks planning their exit strategy, the time incurred training the new hire, and the loss of organizational knowledge and relationships (Boushey & Glynn, 2012). Schiller (2022) agrees; the retention loss of an MGO to the institution results in decreased or delayed giving due to the disruption in relationship between the institution and the donor. Jones (2018) reported MGOs take, on average, two years to create trusting relationships with donors. This is an important indicator of the importance of staying; the amount of time to create a meaningful institutional relationship is the same as the industry average for employees staying in their current positions.

The Lily School of Philanthropy agrees with the aforementioned statistics of 18-months being the average tenure for a fundraising professional (Vanderneck, 2020). The school theorizes low retention rates are a consequence of executives and boards not being invested in the organization, unclear performance expectations, and differentiating measurements of success

(Vanderneck, 2020). High turnover of MGOs hinders the success of the nonprofit and is costly. Weissbein (2020) suggests a culture of collaboration and encouraged learning as solutions to the problem and proposes training opportunities for leadership and MGOs to inspire a lifelong career in nonprofit organizations that has the potential to revolutionize the fundraising industry (Weissbein, 2020).

“Fundraising success sits at the intersection of internal and external relationships” (Plattsmier, 2020, p. 38). MGO turnover hurts fundraising efforts, compromising relationships with donors and interfering with internal teamwork and morale (Simon & Bear, 2020). Relationship building between the MGO and existing donors and the qualification of new donor prospects is crucial to the sustainability of nonprofit university foundations and an investment that pays overtime (Boris, 2019). Perry and Schreifels (2015) emphasize major gift fundraising is based on fulfilling donor passions and interests while matching them to organizational needs. This process takes time, and programs who hire new MGOs need to understand that it takes on average 8 to 10 months from when a new hire is identified to when they are making a meaningful impact for the organization (Perry & Schreifels, 2019). This time takes into account the hiring process, creating the donor prospect pool, familiarizing the MGO with the organization, qualifying the donor prospects assigned, and ensuring the MGO’s personality fits with the assigned prospects to finally build an amicable relationship (Perry & Schreifels, 2015). The employer should not rush this process, as it opens the door to meaningful relationships for the organization and donor prospect. If the relationship is rushed, as in relationships in general, prospects do not feel valued and future donations are in jeopardy. According to Dr. Jacobs (2018), Vice President for Advancement at Central Methodist University, retention of MGOs starts on day one. A formal onboarding process that includes appropriate training highlighting

organization goals and establishing metrics for success results in longevity of MGOs within university foundation organizations (Jacobs, 2018).

The foundations should be careful not to give the MGO the *power* over the donor prospect relationship. Sturm and Monzani (2018) identified three characteristics that define power: discretion, means, and the ability to impose one's will. Being able to establish and manage philanthropic relationships with donors puts the MGO in a powerful position. MGOs have the discretion to promote projects and initiatives they feel are important, and to act as gatekeepers between donor and university, as well as steer a donor in the direction of giving that the MGO feels is important. If foundation leaders are not involved with the individual management of donor prospects, that relationship suffers when the MGO leaves the organization.

Ron Schiller, a nationally recognized consultant to higher education boards, draws from his 30 years of experience as a fundraising leader to accentuate the need for meaningful relationships between MGO and donor, as well as the implications for organizations once an MGO leaves, disrupting the donor's relationship with the institution. Schiller (2022) confirms the low retention rates of MGOs and expresses concern for the loss of relationship resulting in decreased or delayed giving from the generous donors who expect a relationship with the university.

While Schiller (2022) agrees that turnover is costly, he puts forth concepts to help avoid the loss of relationships. Instead of having MGOs work solely with their assigned list of prospects, credit should be given to teamwork. This allows for collaboration and changes the mindset of the MGO to being a facilitator, instead of "owning" the relationship (Schiller, 2022). If a university foundation can implement this strategy with major gift donors, they will not suffer the direct loss when an MGO leaves (Schiller, 2022). While this does not solve the issue of poor

retention rates, it encourages leadership to think of relationship management as a team project, instead of a solo activity. University foundations that credit gifts to individual MGOs incentivize solo fundraising efforts, and when the MGO leaves, that donor prospect relationship with the university is in jeopardy.

Unprecedented turnover in the fundraising sector is a result of leadership failing to create a culture that fosters growth (Simon & Bear, 2020). Foundations need to look inward and create environments that nurture development and retention. Understanding that fundraising is a long-term game with an emphasis on relationship management is key to fundraising success. Perry and Schreifels (2019) offer solutions to high turnover, such as investing in employees for organizational success.

While the full literature review will be provided in Chapter Two, these three common themes can be derived from the aforementioned: university foundations are operating in difficult economic circumstances because of the previous recession, continued state funding cuts, and stresses from the Covid-19 pandemic. These factors have combined to create a challenging environment for university foundations to navigate, and MGOs will need to perform better now than ever before to ensure economic success for the university. The need for retention of MGOs is vital for overall organizational success.

Statement of the Problem

Nonprofit university foundations are 501(c)3 charitable organizations that exist solely to support the universities with which they are associated. Universities rely on their foundations to generate private funds to support the university with research endeavors, learning opportunities, and student support, as well as capital projects. As entities that are separate from the higher education institutions they support, university foundations create relationships with donor

prospects in the hope of acquiring and preserving assets that help the university prosper (Gibbs, & Byrne, 2017).

The problem is that retention of MGOs in nonprofit university foundations is poor and results in the loss of relationships between donors and the university, high turnover expenses, and revenue loss for the foundation itself and ultimately the university. Veritus Group conducted a study that suggested major gift officers change jobs every two years (Perry & Schreifels, 2019), while Giddens (2020) indicated the essence of successful fundraising is the longevity of a donor and major gift officer relationship. Fundraising is a long-term game; university foundations and nonprofits alike must find ways to retain gift officers in order to have a lasting impact on their organizations.

While previous research in the area of retention in nonprofit foundations has addressed the need for retention improvement, little of that research has focused on how to improve retention issues in nonprofit university foundations. This study will explore experiences of employees in nonprofit university foundations with the hope of learning more about how to improve retention rates.

Purpose

The purpose of this research is to examine the retention of employees in nonprofit university foundations, specifically major gift officers (MGOs), in the interest of determining what is important to MGOs to remain employed at their current nonprofit university foundation. Due to the Covid-19 pandemic, universities and colleges across the country stand to lose substantial revenue. Paul Friga (2021), a consultant for the Association of Governing Boards of Universities and Colleges, estimates a staggering loss of \$183 billion based on a comprehensive review of budget and revenue news from the top 400 universities in the country. This net revenue

loss stems from enrollment issues, operating challenges, extra expenses related to Covid-19 testing and vaccinations on campuses, plus additional fiscal outlays that have not yet been anticipated. Based on this predicted loss, the need for private support generated from foundation relationships is crucial for universities to remain operational.

Nonprofit university foundations will be relied on for financial support even more so than before, creating high-stress environments for employees. University foundations will need to have a good understanding of the existing problems plaguing retention to ensure successful navigation through the stressors of the pandemic to increase philanthropy, grow their endowments, and offset legislative budget-cut losses. To investigate why retention rates amongst MGOs working for nonprofit university foundations are so low, the following research questions will be asked.

Research Questions

The study will seek to answer the following questions regarding issues resulting in low major gift officer (MGO) retention rates in nonprofit university foundations:

- What are the main reasons that MGOs leave their current employment?
- What do MGOs perceive as important in constructing a viable work environment?
- From the MGOs perspective, what can employers do to encourage MGOs to continue working for the organization?

Method

University foundation finances and the retention of major gift officers (MGOs) for successful donor management and fundraising are the lifelines of universities; private support that is generated from the foundations and their management of donors allows universities to prosper (Di Mento, 2019). MGOs manage, on average, 150 prospects and cost 213% of their

salary to be replaced (Boushey & Glynn, 2012). With the knowledge that “people give to people” (Giddens, 2020), the financial loss – coupled with the loss of the donor and MGO relationship – can be crippling to the organization.

This descriptive, non-experimental study will focus on the experiences of employees in nonprofit university foundations with the hope of improving retention rates. Because the responses are likely to be varied and broad within the designated population, a cross-sectional survey design is the practical option for the study (McMillan, 2015). Using the Qualtrics survey software, the study will derive input from currently employed MGOs regarding their perceptions of their work environments.

Survey questions will be designed to use neutral phrasing and will incorporate a comment section to allow participants to volunteer qualitative data in the form of explanatory remarks to mitigate the potential for researcher bias. All participants’ identities will remain anonymous. They will consent to the study and confirm they are of legal age, reducing any potential ethical dilemmas.

Participants

A purposeful sampling procedure will identify at least 100 participants from university foundations. Universities will be selected using The National Center for Education Statistics (NCES) and participants will be currently employed foundation representatives. All participants will be adults. Based on demographics, participants might represent a range of geographical areas, years of experience, age, and will work for foundations that serve universities of various sizes and financial needs.

Limitations

The cross-sectional survey method is not without limitation. Created and completed in an environment still rife with the effects of a global pandemic, it may be difficult for employees to remember grievances at the workplace without situating them in the new protocols of the pandemic. External validity will also be limited as individuals in the sample may not be representative of the MGO population as a whole (McMillan, 2015). Generalizability will be limited for the same reason. The use of self-reporting questionnaires limits the findings to perceptions of only the MGOs who respond, which may be contaminated by certain bias or misconceptions about the role of MGO within their nonprofit university foundations (Johnson & Christensen, 2000).

Another limitation is the possibility of participants not answering truthfully (Kerlinger, 1986). The researcher's own professional experience as a currently employed MGO at a nonprofit university foundation may constitute a source of understanding, but may also be viewed as a limitation, as it may be construed as bias.

Delimitations

The study will be limited to MGOs who are currently employed at nonprofit university foundations. The survey will be sent to the sample group in March 2022 and all answers will be recorded and analyzed between April to May 2022.

Significance

While the world continues to battle with the economic upset of the coronavirus pandemic, it is as important now as ever to ensure that a university has a strong and viable accompanying nonprofit foundation working hard to ensure the ongoing success and prosperity of programs and university operations (Williams, 2020).

The findings of this study can help organizational leaders better understand why MGOs are leaving their current positions. The results of this study can support organizational leaders in developing and implementing a sustainable work environment by taking into account MGOs' opinions on their current work situation. This not only helps the foundation with fundraising initiatives, but can build morale, ensure trust from the board, and secure gifts that can transform the face of the university. Students will reap the benefits of the longevity of successful tenured fundraisers.

The results of this study can also assist board members and foundation leadership teams as well as university leadership in making necessary changes and improvements to meet the needs of MGOs. A valued MGO will have less desire to change jobs as frequently as the industry average (Witters & Agrawal, 2015).

CHAPTER 2

LITERATURE REVIEW

As a tax-exempt organization, a university foundation's primary goal is to serve the institution (Pinho, 2009). The foundation has the ability to serve the institution best under the guidance of strong leadership that realizes a sustainable work environment is essential to getting major gift officers (MGOs) to work together to achieve the goal of fundraising initiatives for the betterment of the university.

Leadership, demonstrated naturally throughout the animal kingdom, appears to be a natural habit of all life forms (Antonakis & Day, 2018, p.5.). Leadership over human beings is inseparable from the follower's goals and needs (Burns, 1978). While leadership is often related to followers' resources and motives, leaders should be able to identify problems within an organization and look for solutions (Burns, 1978). The role of leadership in university foundations is to foster an environment of growth, flexibility, and value for employees and donors. Such environments tend to have a positive return on investment from their employees (Friede et al., 2008). The national average tenure of an MGO is less than 18 months (Bakker, 2017; Burk, 2013; Nagul, 2020; Rizkallah, 2020; Schiller, 2022; Vanderneck, 2020). Veritus Group suggests MGO turnover is closer to two years (Perry & Schreifels, 2019). Regardless of the discrepancy between 18 and 24 months in average occupancy of the position, neither number is adequate for the nature of the position. Nonprofit university foundation leaders need to address the revolving door of MGOs and look at internal problems that contribute to high turnover. Because philanthropy is a long-term game (Brooke, 2018; Giddens, 2020), it is imperative to find ways for MGOs to continue working for their nonprofit foundations, using their influence for longer than the industry average.

The literature review for examining retention in nonprofit foundations has two foci: costs employee job satisfaction and value, and challenges to fundraising.

Job Satisfaction and Value

Scholars have addressed the relationship between organizational culture, its leadership, and the effect employee satisfaction has on retention, noting that the most protuberant challenge to nonprofits is employee turnover (Hrywna, 2019). Nonprofit organizations experience higher turnover than for-profit organizations (Strub, 2020). Many MGOs cite limited experience, lack of training, poor compensation, lack of perceived value, and unrealistic expectations as reasons for not being successful in their roles (Joslyn, 2019; Meyer, n.d.; Papp, 2019; Schoshinski, 2017; Towner, 2019; Witters & Agrawal, 2015).

President of the Association of Fundraising Professionals, Mike Greiger, wrote an article for *Advancing Philanthropy* about job satisfaction, specifically within nonprofit organizations. Job satisfaction within nonprofit organizations is about relationships with donors, bosses, and coworkers (Greiger, 2020). Nonprofit university foundations' job satisfaction includes those relationships as well as the connections with the university and its leadership. Job satisfaction is also about perceived respect, salary, benefits, management, and organizational culture (Greiger, 2020). A job satisfaction survey for *The Chronicle of Philanthropy* was conducted in 2019 that indicated 25% of fundraiser participants were "very likely" to leave their nonprofit job within the next two years, and around 10% said they were ready to leave the fundraising profession altogether (Greiger, 2020). The survey showed salary was the number one reason fundraisers were looking to leave their jobs and the industry, closely followed by management problems, disgruntlement with leadership, unreasonable fundraising goals, and bad organizational culture (Greiger, 2020).

Sandy Rees, an advisor on leadership for nonprofit organizations, emphasizes the need for strong leadership to ensure employees understand organizational goals, have the skill set to perform in their role, offer encouragement and guide the team to overall fundraising success (Rees, 2019). Leadership development and management expertise can help the nonprofit university foundation sector with overall job satisfaction and provide a high return on investment (ROI) (Shepard, Jr., 2014). ROI in this instance is not strictly related to finances, it refers to the ROI resulting from greater stability within the organization, lower turnover costs as well as a higher mission impact (Shepard, Jr., 2014). The ROI of satisfied MGOs is uncapped. MGOs must create a lasting, beneficial relationship with donors. They often know intimate details about the prospects, and in some cases, donors consider them friends or even extended family (Papp, 2019). MGOs can spend years creating these relationships and feel left out when universities embark on campaigns that rely on the support of the major donors, but neglect the MGOs' opinions on approach or campaign initiatives. Universities that involve MGOs in decision-making will ensure that the MGO feels valued and is in tune with the initiatives within the university (Papp, 2019).

Knowing healthy relationships result in growth, it is the responsibility of a nonprofit organization leader to lead the organization in a manner that encourages open communication, trust, and transparency (Simon & Bear, 2020). In a cross-sectional survey of 300 participants, Tsai (2011) found a significant correlation between positive leadership and employee job satisfaction. This correlation points to the importance of culture within an organization. Jacobs and Roodt, (2008) reported a similar correlation between positive work culture and longevity of employees. They, too, found that open communication between employees and leadership had a positive correlation to turnover rates. Employees who are happily employed promote the

organizational ethos, and organizations that promote positive relationships between leadership and employees have less turnover than organizations that do not (Tsai, 2011).

A survey by UnderDeveloped found that 55% of MGOs do not feel appreciated in their role (Towner, 2019). Nonprofit managers and researchers would benefit from understanding how organizational relationships and structures predict and influence employee outcomes (Knapp., et al., 2017). They too, would benefit from knowing what makes the remaining 45% of MGOs feel appreciated. Harris Insights and Analytics surveyed 1,035 fundraisers through the Harris Poll, for the Chronicle and the Association of Fundraising Professionals, to better understand why fundraisers were leaving their jobs (Joslyn, 2019). The study found that 51% of current fundraisers planned to leave their jobs by 2021, two years after the data collection period (Joslyn, 2019). This result is in line with the industry average and needs to be explored to better understand why fundraisers are dissatisfied. The reasons given by the 51% who planned to leave their current positions were too much pressure, unrealistic goals, poor compensation, and frustrating organizational culture (Joslyn, 2019). These findings echoed those of Philips and Hernandez (2018); they found low compensation, funding issues, and vacant positions were the biggest problems resulting in high turnover for MGOs.

Scholars have focused on pay and compensation leading to better retention within organizations (Kim & Lee, 2007; Locke, 1976; Mulvey et. al., 2003). Kim and Lee (2007) conducted much of their research on creating an environment that emphasized the organizational mission. Employees who felt attached to the mission, supplemented with career-advancement opportunities and pay incentives, stayed with their nonprofit organizations longer. Locke (1976) highlights the use of promotions, work conditions, and recognition for work done to assure higher employee satisfaction, less absenteeism, and less turnover. Incorporating facets of

nonprofit work that draws employees to the industry in the first place, such as a culture that fosters philanthropy and is fulfilling for employees, results in satisfied fundraisers and better retention rates (Greiger, 2020).

Loyalty stemming from valued compensation contributed to retention of employees (Mulvey et al., 2002). Adequate compensation, whether in the form of recognition, time off, flexible work hours, or pay, led to overall satisfaction of employees and resulted in higher retention (Cranny et. al., 1992). Knapp et al. (2017), conducted a study on nonprofit organizations that concluded organizational support directly reflected the quality of the rapport between employee and employer and that job satisfaction is unwaveringly related to retention rates. The researchers found employees are drawn to nonprofit organizations because of the meaningfulness of the work and the mission, but the retention of qualified employees, as with MGOs, is a concern (Knapp et. al., 2017). Employees who feel valued and engaged are 59% less likely to change jobs (Witters & Agrawal, 2015). MGOs who are satisfied in their positions and with the organization have less reason to seek other employment.

Frederick Herzberg, a professor of psychology, created the two-factor theory that investigated employee motivation. The two-factor theory recognized job satisfaction and job dissatisfaction are independent of each other and are reliant on factors in the workplace (Stone, 2020). The two factors are hygiene (job security, salary, culture, and organizational policies) and motivators (advancement, opportunities, recognition) (Frederick, 2003). It is important to note that if hygiene factors are acceptable, employees are not dissatisfied, but they require motivators to be satisfied (Stone, 2020). Nonprofit organizations should incorporate Herzberg's theory to improve conditions for motivation, cutting down on retention issues that plague the industry (Stone, 2020).

Disengagement of employees is costly in for-profit and non-profit organizations, alike. An engaged employee is a worker who embodies company values, is committed to the mission, and is loyal to the cause; a disengaged employee is the opposite and can be extremely costly to the organization (Miech, 2020). Queens School of Business and the Gallup Organization found that disengaged employees were absent 37% more than satisfied employees (Seppälä & Kim Cameron, 2015). Organizations with reported disengagement of employees experienced lower productivity, lower profitability, and less growth than organizations with high engagement scores (Seppälä & Kim Cameron, 2015). Nonprofit university foundations are not exempt from the casualties caused by disengagement. Penelope Burk, president of Cygnus Applied Research Inc. and author of *Donor Centered Leadership*, spent years studying the dynamics of fundraising and the related industry issues. While Burk (2013) reported compensation as the number one reason for MGO turnover, she emphasized the importance of engaging employees for longevity and overall positive organizational production.

Office environment is especially important in foundations as the MGO needs to be comfortable bringing donors to campus and potentially to their office space to discuss the donors' wishes (Papp, 2019). A donor will be able to sense if the environment is hostile or not, and a hostile environment is neither good for fundraising nor retention of the gift officer. Creating a comfortable environment involves staff personalities and interactions among the employees, as well as employer and employee interactions. It is best to resolve office disputes immediately to avoid lingering issues. The benefits of a harmonious work environment result in all-around satisfaction, less absenteeism of employees, promotion of employee strong-suits and competencies as well as prominent engagement, efficiency, and retention of talent (Feffer, 2015).

If there are people within a team who do not embody the organizational culture, the team suffers and, consequently, so does the fundraising success (Plattsmier, 2020).

Schoshinski's (2017) research on challenges and solutions for nonprofit organizations through data from the 2013 Nonprofit Employment Trends Survey, as well as the 2012 SHRM Employee Satisfaction and Engagement Survey, focused on redefining recruitment strategies to attract employees interested in staying with the organization for the foreseeable future.

Schoshinski (2017) suggested employers should use precise language that demonstrated the company's culture to ensure the hire will be a good fit. Because nonprofit organizations typically have smaller budgets than for-profit organizations, employers should emphasize the total compensation package, highlight the benefits associated with the nonprofit organization and emphasize employee engagement. Employees, in this instance, MGOs, who feel committed to the organization's mission will be motivated to remain with the organization. The feeling that they are making a difference within an organization is important to employees. Schoshinski (2017) emphasizes the desire for employee satisfaction for the overall success of an organization. The employer is also tasked with finding amiable MGOs who will be able to create lasting relationships with donors and be suitable candidates to minimize office disputes. If there are people within the organization who do not exemplify the culture, teamwork is abandoned and ultimately fundraising suffers (Plattsmier, 2020). This, however, is not purely the employer's responsibility. With over 20 years of experience in fundraising, Tracy Vanderneck reports for *Advancing Philanthropy* magazine on MGOs doing their homework before accepting a job at a nonprofit organization as a fundraiser. A good fit for an MGO and the organization is the ultimate win-win, resulting in quality relationships between MGOs and donors as well as MGOs and the organization (Vanderneck, 2020). Chilutti (2020) echoes the sentiment of fundraisers

learning about the organization before committing; knowing the impact philanthropy has on the university, community and the people it serves helps the fundraiser assimilate with the organizational mission. An MGO should take their time researching the organization to ensure the nonprofit is a viable fit for them both professionally, ethically, and personally (Vanderneck, 2020).

Jan Brazzell, a fundraising professional and nonprofit executive, understands the stress boards and nonprofit foundation leaders put on MGOs by reporting fundraising performance. She highlights the fact that dollars raised do not necessarily reflect the performance of the MGO (Brazzell, 2019). For instance, MGO performance this year may only reflect in dollars raised next year; therefore, university foundation leaders need to compliment and acknowledge the effort put into the cultivation of the donor/MGO relationship as they would for dollars raised. Foundation boards played a vital part in setting the tone for organizational culture founded on trust and relationship building (Boris, 2019). A plan to grow a nonprofit university foundation sustainably over time included the management of current and future donors by MGOs who feel valued and appreciated within their role by leadership (Brazzell, 2019). MGOs must be supported and respected by leadership in order to perform at their highest level and have a satisfying career in nonprofit organizations (Boris, 2019).

Less-personal problems, such as flexible hours and updated technology, also contributed to overall job satisfaction and a sense of being valued. Work ethic was directly correlated to feeling valued by an organization and is important for a foundation to prosper (Mintz, 2017). Nonprofit university foundations that were transparent with employees about finances, projects, campaigns, and the MGO/donor relationships reap the most success (Papp, 2019).

The issues presented in previous studies highlight the need for solutions to the ongoing retention problems of MGOs in nonprofit university foundations. The implementation of sustainable work environments in nonprofit foundations had the ability to reduce turnover. Creating an environment of trust and transparency with flexible work hours allows the MGO to travel to consultations and focus on donors, instead of worrying about issues at the office. Technological updates and easy-to-navigate management portals can alleviate stress for the MGO and help them track donors. Reducing stress makes employees happier and contributes to greater retention. An environment that fosters growth, rewards success, and embodies trust is an environment that nurtures engaged employees and MGOs alike (Miech, 2020).

Challenges to Fundraising

Dr. Osili, a professor of economics and philanthropic studies, researched the challenges to higher education philanthropy for the Teachers Insurance and Annuity Association (TIAA). He identified changes in philanthropic patterns and economic and socio-demographic factors, as well as the fraction of Americans who are contributing and the amounts they gave (Osili, 2019). The Annual Report on Philanthropy for the Year 2017 (the latest published report) showed foundation and alumni giving accounted for 30% and 26% of all higher education philanthropy, respectively (Giving USA, 2018). These percentages are crucial as public funding has been declining. Since 2010, states collectively have cut \$9 billion from higher education budgets (Marcus, 2019). Whitford (2021) reports overall state education budgets have not fully recovered from cuts made during the 2008 recession and were in decline preceding 2008. As a result, public higher education budgets are historically low. As government assistance decreases, the need for nonprofit foundation support becomes instrumental in offsetting costs (Vaughan, 2010).

According to Bhutta et al. (2020), reports for the Federal Reserve System show a decrease of 3% in mean family income from 2016 to 2019. This number does not reflect further decreases caused by the 2020 pandemic, but a significant impact can be expected based on historical events, such as the events mentioned in Chapter One: the Great Depression, the dot-com bubble bust, and the 2008 recession. This decline in family income has a direct correlation to decreased higher education budgets per household (Yoder, 2020). Philanthropy saw a decline after the 2008 recession, and universities can assume that this same trend will result from the Covid-19 pandemic in which joblessness was at 14.7%, the highest level since The Great Depression (Iacurci, 2020). While the unemployment rate has recovered; in July 2022 the rate was 3.6% (Amadeo, 2022), other factors such as gas prices and inflation may cause households to restrict giving (Onwuka, 2022). The Bureau of Labor Statistics (BLS) reported an increase of 8.5% in inflation over the past year (Onwuka, 2022). To add to the economic pressures facing American households, Russia's invasion of Ukraine in 2022 has resulted in energy prices skyrocketing, leaving fewer dollars for philanthropy (Onwuku, 2022). The persistent concern for foundations and organizations that rely on high-net-worth households is that alongside joblessness, the number of such households has decreased (Bhutta et. al., 2020). Universities rely on private donations to sustain and grow, but with the decline in high-income households and subsequent decline in donations, universities need to rely on their foundations to help offset losses.

In the year 2000, two-thirds of adults contributed to charities, but in 2014, the percentage of adults donating declined to 55.5% (Osili & Zarins, 2018). This raises concern for nonprofits and universities who rely on these private donations, as high-net-worth households are more likely to donate to education over any other cause, and benevolence from high-net-worth

households is typically ongoing. Characteristically, these households are dedicated to efforts such as policy making, systematic reform, and advocacy (Osili, 2019). Therefore, having fewer donors is not simply a monetary issue but an issue of program support, as well. The issue of reduced giving is worrisome for the future of fundraising and the prosperity of universities.

The aging population causes further concern, as young American families give less than households with people 60 years or older do (Osili, 2019). Boris (2019) realizes the importance of understanding philanthropic trends; where declining donor numbers are evident, nonprofit foundations need to develop strategies to ensure philanthropy is not lost or disregarded by adversative civic policies. To be successful in the future, higher-education philanthropy needs to address issues such as income inequality, declining rates of social mobility, and the advances in technology, looking to online tools to broaden the donor base and engage with younger prospects (Boris, 2019).

In a study conducted by Philanthropy Works Organization, “How long for a major gift?” (n.d.), the researchers’ findings for resulting donations varied from 6 to 12 months to 8 to 18 months on average, with some responses claiming upward of three years. The responses were varied based on two things: the size of the gift and the donors’ perceived trust in the institution. Since this study is looking specifically at major gifts, those of \$25,000 or more, the consensus is that major gift fundraising takes 18 months to cultivate (Philanthropy Works., n.d.). This statistic is problematic for nonprofit university foundations with high turnover percentages. If the average time to cultivate a major gift is 18 months, the MGO who began the process, statistically, will not be employed to see the gift to fruition. The constant spin-cycle of gift officers the donor has to endure before deciding to make a significant gift poses as an issue for university foundations and the longevity of fundraising based on meaningful relationships.

Ken Jones, the cofounder of Above Goal, a technology company that specializes in fundraising, identifies the need for campaigns as a fundraising strategy. A campaign is an approach to cultivate revenue, rally donors and confidently position an organization for the future (Jones, 2019). Universities and nonprofit organizations alike engage in campaigns once a decade or even less (Eisenstein & Kihlstedt, 2019). Therefore, with the retention statistics aforementioned, the MGOs in place for the current campaign are not the MGOs that were tasked with the last campaign. Eisenstien (2019) states essentially no development directors (MGOs) have widespread knowledge or experience running campaigns. This leads to problems of confidence internally as well as externally; staff members are not confident in the campaign, the goals, or how to run a successful campaign, and externally; donors, community, and board members are not confident with the current team. In an interview for *Advancing Philanthropy*, Amy Varga, of the Varga Group, emphasized the shortage of cultivated major donors for a successful campaign based on the high MGO turnover statistics (Eisenstein & Kihlstedt, 2019).

Co-Founder and CEO at Bloomerang, Ross Hendrickson, did an interview for Ken Jones for *Advancing Philanthropy* magazine. Hendrickson, also, touched on the need for campaigns as successful fundraising tactics and emphasized the need for meaningful relationships between donor prospects and MGOs. He noted the most successful nonprofit organizations that engage in campaigns are ones that build relationships with donors and donor prospects (Jones, 2019). Henderson goes on to explain nonprofit organizations that cultivate donors (i.e., have meaningful relationships, schedule one-on-one visits, make phone calls and interact with donors) are far more successful than organizations that do not. Data may indicate that donor prospects have the capabilities to donate at a high capacity, but without careful management of the donor/MGO relationship, donor prospects will not feel inclined to donate at the level of which they are

capable (Jones, 2019). This is important to understand when engaging in a fundraising campaign for the betterment of a university. If MGO turnover is high, the meaningful relationship donors and donor prospects crave will be nonexistent, making a campaign unsuccessful.

Perry (2021) highlights the need for valued and carefully cultivated relationships between donors and MGOs. Value attrition rates for nonprofit organizations are at an all-time high, meaning donations from donors who are not carefully cultivated decrease in value over time (Perry, 2021). On average, a decrease of attrition rate from 40% to 60% can be expected from donors who do not have a valued relationship with the organization, compared to a cultivated donor/MGO relationship that results in a far lesser attrition rate, typically of 6% to 11% (Perry, 2021). Financially, this points to the necessity of relationship management helping donors achieve their philanthropic wishes.

Brazzell (2019) shared her expertise on the environment in which MGOs needed to be competitive to cope and succeed in an ever-changing fundraising climate. Brazzell (2019) pointed to the paradox of development in communication tools. With an overabundance of mechanisms available to MGOs to reach donor prospects, it seems to have distanced constituents as they feel overwhelmed by the number of nonprofit organizations contending for their attention (Brazzell, 2019). The telephone relationship becomes difficult to accomplish as people tend to not answer calls from unfamiliar numbers, as they were hesitant of spam callers (Schiller, 2017). MGOs needed to be creative to produce a meaningful bidirectional conversation that results in a nurtured philanthropic relationship. They also need to stay with the organization to grow that established relationship (Brazzell, 2019). If donors have a new MGO calling every year, they will tire of the ongoing introductions. Brazzell (2019) predicts donor fatigue is the biggest challenge to nonprofit fundraising.

Technological advancements and social media have altered the environment in which nonprofit organizations operate. While it is less costly and easy to reach a broad spectrum of people, it is difficult to track who is being contacted (Boris, 2019). With a diversified society and a concentration of wealth, nonprofit university foundations need to have a good understanding of the donor prospects they are spending time cultivating, and the only way to do that successfully is through the careful development of the MGO and donor prospect relationship.

Summary

Retention of major gift officers is vital for a foundation's success and directly correlates to the overall prosperity of the university. Major issues such as job satisfaction and value, office environment, trust and transparency, lack of training, and poor compensation contribute to the MGOs diminished feeling of worth within an organization. In an environment that values return of investment, university foundations need to combat the economic challenges posed to higher education since the Great Recession and the Covid-19 pandemic to engage with stakeholders and ensure MGOs feel valued within the organization to reach maximum potential, both financially for the institution and in terms of relationships created. If nonprofit organizations can get to the root of the problems that are driving high turnover by MGOs, the university, its students, and surrounding communities will benefit from the prosperous relationships these valuable officers create.

CHAPTER 3

RESEARCH METHODS

This chapter focuses on the methods that were used to conduct this descriptive, non-experimental study utilizing a cross-sectional survey design. Purpose, research questions, population, study design, and procedure for data collection and analysis, as well as limitations, are addressed.

Purpose

The purpose of this research was to examine the retention of major gift officers (MGOs) in nonprofit university foundations, in the interest of determining what is important to MGOs to remain employed at their current nonprofit university foundation. Due to the stressors highlighted in the preview literature review and literature review, the need for private support generated from foundation relationships is crucial for universities to remain operational.

A prevailing understanding of problems plaguing retention of MGOs is essential to ensure university foundations' successful navigation through the stressors to increase philanthropy, grow their endowments, and offset legislative budget-cut losses. The following research questions originated from the review of literature.

Research Questions

The focus of this research was to address the retention issues of major gift officers (MGOs) in nonprofit university foundations. Per review of literature, retention of MGOs for efficacious donor management and fundraising efforts proved to be essential for university prosperity. Three specific research questions originated from the review of literature:

1. What are the main reasons that MGOs leave their current employment?
2. What do MGOs perceive as important in constructing a viable work environment?

3. From the MGOs perspective, what can employers do to encourage MGOs to continue working for the organization?

Population

The population for this study was 656 currently employed major gift officers (MGOs) at nonprofit university foundations serving public, four-year institutions throughout the United States. Universities use “development officer” and “MGO” titles interchangeably; the survey ensured that the participants served their foundations in the capacity of “major gift fundraiser.” Utilizing the National Center for Education Statistics (NCES) database, the researcher randomly selected the research population. The geography of foundations selected is spread across the United States to ensure diversity. A diverse population guaranteed participants represented a range of geographical areas, years of experience, and ages. It also diversified the sizes of the universities and the financial needs. The university foundations that the MGO participants were selected are listed in Appendix A.

Study Design

The research design used is a descriptive, non-experimental study that focused on the experiences of employees in nonprofit universities with the hope of improving retention rates (McMillan, 2015). A non-experimental design was appropriate because the independent variable (i.e., age, sex, ethnicity, race, gross income, and education level) could not be manipulated, and the research questions focused on relationships (i.e., between independent variables and the MGO participant responses). The research questions were designed to examine the relationship between MGO and the work environment. A cross-sectional survey design was used, as responses were likely to be diverse and broad within the designated population (McMillan, 2015). Using the Qualtrics survey software, the study derived input from currently employed

MGOs regarding their particular experiences to formulate perceptions of their work environments. Survey questions used neutral phrasing and were in the form of Likert-type scales, multiple-choice, and fill-in-the-blank statements to gather data from participants. The anonymity of participants was honored and consent of participation was required in order to participate. Anonymity was important to encourage greater disclosure.

Procedure for Data Collection

The researcher of this study identified public, four-year institutions with accompanying foundations in 2022 to find MGO participants using the National Center for Education Statistics (NCES). A survey of 35 questions was emailed to participants whose universities met the criteria. Embedded within the email was a link to the Qualtrics-based survey and instructions that explained the survey was voluntary. Following the link, participants were provided informed consent and an explanation was given. Consent was necessary to ensure participants were aware that there were no risks associated with participation and the information was understood (Couper & Singer, 2009). Participants were aware of the four-week window in which responses were requested. Three separate reminder emails were sent to potential participants once a week until the end date of the survey. Once data was collected and cleaned, descriptive statistics was determined for the Likert-type and demographic items to analyze patterns between independent variables and the MGO participant responses. Measures of central tendency (e.g., means, medians, frequencies, etc.) was calculated and Pearson's r scores established whether relationships existed between participant perceptions and selected demographic variables (e.g., degree level, years of experience as an MGO, intended years of employment at their current foundation, etc.). For any open-ended questions, content analysis was conducted in order to identify themes or patterns. The use of open-ended questions encouraged participants to provide

individual responses from their social experiences that were free from constraint (Creswell, 2003).

Limitations

The cross-sectional survey method is not without limitation, and while this survey was designed and executed in an environment endeavoring to mitigate the effects of a global pandemic, it may have been difficult for employees to reflect upon grievances at the workplace without filtering them through new protocols implemented during these uncertain times. External validity was also limited, as individuals in the sample may not be representative of the MGO population as a whole (McMillan, 2015). Broader application of the data may be fruitless for the same reason, as the use of self-reporting questionnaires limited the findings to the perspective of only the MGOs who responded. This may, in turn, be contaminated by certain biases or misconceptions about the role of an MGO within their nonprofit university foundations (Johnson & Christensen, 2000).

Summary

This chapter provides information on the research study design, population, data-collection methods, and intended data analyses to be used in this study to determine the problems of retention of MGOs in nonprofit university foundations. This research will feature a descriptive, non-experimental design and utilize the cross-sectional survey design to gather information from at least 100 MGOs who will participate in the study. The results will be used to determine better practices for nonprofit university foundations in the hopes of improving retention rates of MGOs.

CHAPTER 4

PRESENTATION AND ANALYSIS OF DATA

This chapter contains the findings and statistical analyses of data collected in this study. This study sought to examine the perceptions of currently employed major gift officers (MGOs) in university foundations to determine what is important to MGOs to remain employed at their current nonprofit university foundation. The 61 university foundations from which the MGOs were selected were identified through the National Center for Education Statistics (NCES) database. A filter to specify public, four-year institutions was used. Currently employed MGOs were identified on the selected university foundations' websites. The research instrument was created using Qualtrics survey software to answer the following questions:

1. What are the main reasons that MGOs leave their current employment?
2. What do MGOs perceive as important in constructing a viable work environment?
3. From the MGOs perspective, what can employers do to encourage MGOs to continue working for the organization?

Population and Sample

Initially, 656 currently employed MGOs were identified from the 61 university foundations listed in Appendix A. The anonymous survey link was distributed via email using contact information obtained from university foundation websites. Due to several emails failing to send or being returned, the audience size was reduced to 611 currently employed MGOs. Due to the study's being anonymous, a figure of participating MGOs and their respective universities is not provided.

At the end of the four-week data collection period, 126 surveys were submitted. Of those 126, some were only partially completed, but the responses were included as appropriate. The response rate was $n = 20.62\%$.

The survey instrument was designed to measure perceptions of currently employed MGOs within their university foundations. The first page included informed consent; if participants consented to the survey, they were prompted to continue. The survey was divided into nine sections: the first (SQ1-SQ3) examined past experience in nonprofit university foundations and reasons for leaving; the second (SQ4- SQ9) examined how many years of intended work, training, and satisfaction with the work culture and environment; the third (SQ10-SQ18) focused on perceptions of value within the role of MGO and utilized Qualtrics skip-logic feature to further examine the meaning of “value”; the fourth (SQ19- SQ21) examined job expectations, pride, and satisfaction with the role of MGO; the fifth (SQ22-SQ24) utilized Qualtrics skip-logic feature to examine incentives for meeting work performance expectations; the sixth (SQ25-SQ27) examined performance expectations and the path up the organizational ladder; the seventh (SQ28-SQ29) utilized Qualtrics skip-logic function to determine whether MGOs have adequate resources to be successful, and if not, what resources are necessary to be successful; the eighth (SQ30) gave participants an opportunity to add any comments or concerns they have as an MGO in a nonprofit university foundation in order to better the industry; and the ninth (SQ31-SQ36) concerned demographics.

Table 1 shows the age range of participants. The age group 36-45 years was most represented with 38 ($n = 33.93\%$) respondents, closely followed by the 46-55 year age range with 32 ($n = 28.57\%$) respondents; 35 years or fewer had 22 ($n = 19.64\%$) respondents; while 56 years or older had 19 ($n = 16.96\%$); one ($n = 0.89\%$) participant chose not to state their age. Due

to the demographics being at the end of the survey, those participants who did not fully complete the survey are not represented in the demographic analysis because they did not complete all items on the instrument.

Table 1

Participant Age Groups

Age Group	<i>n</i>	Percentage (%)
35 years or less	22	19.64%
36-45 years	38	33.93%
46-55 years	32	28.57%
56 years or older	19	16.96%
Prefer not to say	1	0.89%
Total	112	100%

The second demographic question asked participants to select their sex. Table 2 shows 45 ($n = 40.18\%$) male participants and 64 ($n = 57.14\%$) female participants. No participant identified as non-binary or preferred not to say, and three participants ($n = 2.68\%$) chose not to respond to this item.

Table 2*Participant Sex*

Sex	<i>n</i>	Percentage (%)
Male	45	40.18%
Female	64	57.14%
Non-binary/third gender	0	0%
Prefer not to say	3	2.68%
Total	112	100%

The third demographic question inquired about ethnicity. Table 3 shows the MGO sample in this study was predominately of non-Hispanic or Latino or Spanish origin. A total of 96 ($n = 86.49\%$) participants selected non-Hispanic or Latino or Spanish origin, while only six participants ($n = 5.41\%$) reported that they were of Hispanic or Latino or Spanish origin. Nine participants ($n = 8.11\%$) chose not to respond to this item.

Table 3*Participant Ethnicity*

Ethnicity	<i>n</i>	Percentage (%)
Non-Hispanic or Latino or Spanish origin	96	86.49%
Prefer not to identify	9	8.11%
Hispanic or Latino or Spanish origin	6	5.41%
Total	111	100%

Table 4 shows MGO participants' race. The participant population was predominantly White or Caucasian ($n = 99$; 85.34%); four participants ($n = 3.45\%$) were Black or African American; two ($n = 1.72\%$) participants were American Indian or Alaska Native as well as Asian

respectively. No participant was Native Hawaiian or Pacific Islander and nine participants ($n = 7.76\%$) did not respond to this item.

Table 4

Participant Race

Race	<i>n</i>	Percentage (%)
White or Caucasian	99	85.34%
Black or African American	4	3.45%
American Indian or Alaska Native	2	1.72%
Asian	2	1.72%
Native Hawaiian or Pacific Islander	0	0%
Prefer not to Identify	9	7.76%
Total	116	100%

Another demographic question asked MGO participants to disclose their gross income. Table 5 shows most participants in this study, $n = 93$ (83.78%), make \$60,000 or more; 12 participants ($n = 10.81\%$) reported a gross income of \$45,000-\$59,999; one participant ($n = 0.90\%$) participant earns between \$30,000 and \$44,999; five participants ($n = 4.50\%$) chose not to disclose this information, and no MGO in this study earned less than \$30,000.

Table 5*Participant Gross Income*

Gross Income	<i>n</i>	Percentage (%)
\$30k or less	0	0%
\$30k-\$44,999	1	0.90%
\$45k-\$59,999	12	10.81%
\$60k or more	93	83.78%
Prefer not to say	5	4.50%
Total	111	100%

The final demographic question asked participants to select the highest level of education they had completed. Table 6 shows most participants held a master's or bachelor's degree. Specifically, 52 ($n = 46.43\%$) participants held a master's degree and 49 participants ($n = 43.75\%$) held a bachelor's degree; 10 participants ($n = 8.93\%$) held a doctoral degree and one participant ($n = 0.89\%$) had some college education. No participant selected high school graduate.

Table 6

Participant Level of Education

Education Level	<i>n</i>	Percentage (%)
High school graduate	0	0%
Some college	1	0.89%
Bachelor's degree	48	43.75%
Master's degree	52	46.43%
Doctoral degree	10	8.93%
Total	112	100%

Findings

The results of this study indicate that the primary reasons major gift officers (MGOs) leave their employment are due to what they view as insufficient compensation, feeling undervalued, working in an environment that lacks transparency, receiving inadequate or no training, lacking career advancement opportunities, and a indulging desire to climb the organizational ladder. The results were somewhat surprising, as they did not reflect the same turnover level reported in the review of literature in Chapters One and Two. This may be because the study was relatively small; only 126 participants consented to the survey, and the participants are currently employed MGOs in nonprofit university foundations (i.e., they are predicting when they will leave, versus those who have quit). Bivariate correlation was conducted using IBM SPSS Statistics 26 to determine relationships between independent variables and MGO participant responses. As a result, 13 relationships were established and will be reported individually. Many of the survey questions answered elements of all three research questions; however, for analysis, the survey results will be reported by research question.

Findings Related to Research Question One: What are the main reasons that MGOs leave their current employment?

One of the primary motives for this study was to discover the main reasons why MGOs leave their current employment. Due to the study's being limited to currently employed MGOs in nonprofit university foundations, the researcher designed SQ1 to get a glimpse into whether the MGO participants had previous experience in nonprofit organizations. Out of the 124 participants who answered this question, 99 participants ($n = 79.84\%$) reported they had previous experience. Using the Qualtrics skip-logic feature, SQ2 was designed to determine how long the $n = 79.84\%$ of previously employed participants lasted in their previous positions. Based on findings reported in Chapters One and Two, it was surprising to see that $n = 52.04\%$ of this participation population lasted ten-plus years in their previous positions. Only five participants ($n = 5.10\%$) stated they stayed the reported industry average of two years.

Table 7

Years of Employment

Years	<i>n</i>	Percentage (%)
<2	5	5.10%
2-5	19	19.39%
6-10	23	23.47%
>10	51	52.04%
Total	98	100%

SQ3 was designed to discern participants' reason for leaving their positions. A total of 34 ($n = 29.06\%$) participants listed feeling undervalued as a reason for leaving and $n = 21$ (17.95%)

reported unsatisfactory compensation. Lack of training was listed by $n = 4$ (3.42%) participants and is a positive indicator for organizations that they are training their MGOs satisfactorily. $n = 58$ (49.57%) chose “other” and some chose to add in a written response.

Table 8

Reasons for Leaving

Reasons	<i>n</i>	Percentage (%)
Unsatisfactory compensation	21	17.95%
Feeling undervalued	34	29.06%
Lack of Training	4	3.42%
Other	58	49.57%
Total	117	100%

Thirty-five written responses were reported. Of those, some are out of the organization’s purview, such as family relocation, internship opportunities turning into full-time positions at the organization or elsewhere, positions being eliminated due to the Covid-19 pandemic, commute issues, and participants’ leaving the nonprofit sector altogether.

Some common responses were within the organization’s purview to manage and have the potential to help organizations ensure the retention of their MGOs. One written response that was cited frequently was the opportunity for career advancement. MGOs want an opportunity to advance in their careers, take on more responsibility and expand their knowledge in the field. The MGOs in this study made it clear that they had a “desire to take on a bigger role” within the foundation. They aspired for professional development, professional growth, and control of fundraising strategies. One participant stated their reason for leaving their previous employment was that there was “not enough major gift and planned giving work.” These were two of the

greatest responsibilities of MGOs. If MGOs are leaving because they want more responsibility and more work, organizations can offer these opportunities to retain skilled and willing workers. Other reasons MGOs chose to leave their previous employment were the stress of fundraising, unreasonable expectations from management, lack of ethical leadership, age and sex discrimination, lack of tuition benefits for the family, and better compensation opportunities.

The bivariate correlation, shown in Table 9, reveals a positive relationship between participants' age and their reasons for leaving their previous position. The correlation between reasons for leaving (Table 8) and participants' age (see Table 1) are significant at the $p < 0.01$ level. The data suggest the younger the participants, the more likely they are to change jobs due to unsatisfactory compensation and feeling undervalued.

Table 9

Bivariate Correlation: Participant Age and Reason for Leaving Previous Position

	Participant Age	Reason for Leaving
Participant Age	--	.274**
Reason for Leaving	.274**	--

**Correlation is significant at the $p < 0.01$ level (two-tailed).

To better understand why MGOs leave their employment, SQ4 was designed to determine years of intended work at the current university nonprofit. Here too, participants predicted working for their current university foundations far longer than the reported industry average. Table 10 shows the years of intended employment.

Table 10*Years of Intended Employment*

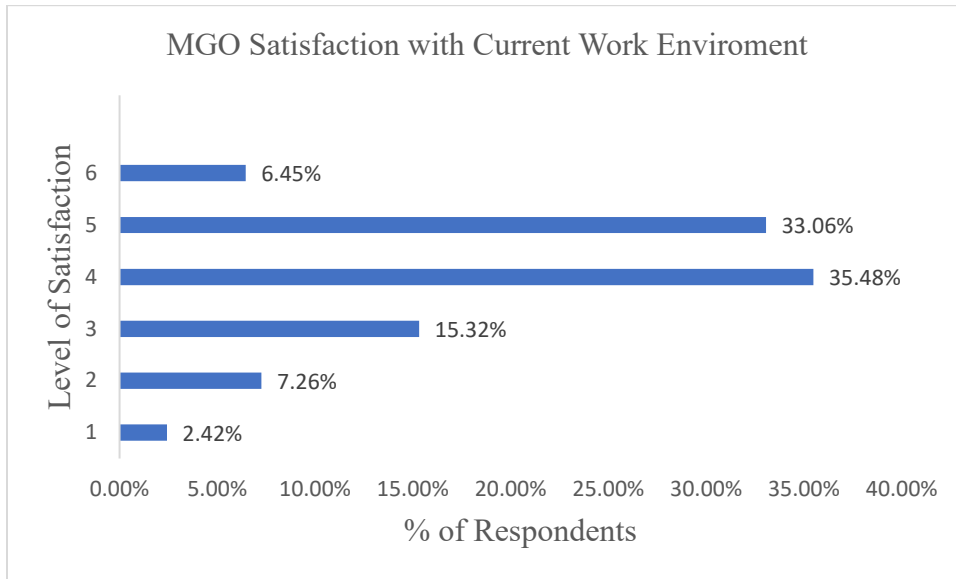
Years	<i>n</i>	Percentage (%)
<2	9	7.38%
2-5	37	30.33%
6-10	37	30.33%
>10	39	31.97%
Total	122	100%

Findings Related to Research Question Two: What do MGOs perceive as important in constructing a viable work environment?

To understand the retention of major gift officers in nonprofit university foundations, it is paramount to understand what MGOs perceive as important in constructing a viable work environment. By using a Likert-type scale, SQ5 asked participants to report how satisfied they were with their current work environment, ranging from “not at all satisfied” (1) to “completely” satisfied (6). Only eight ($n = 6.45\%$) participants declared that they were completely satisfied with their current employment; 41 ($n = 33.06\%$) and 44 ($n = 35.48\%$) participants picked 5 and 4 respectively on the satisfactory scale; 19 participants ($n = 15.32\%$) picked 3; nine participants ($n = 7.26\%$) picked 2; and three ($n = 2.42\%$) participants were not satisfied at all with their current work environment. In all, 124 participants answered this item, and the mean response was 4.09. From this population, on average, the participant MGOs are essentially satisfied with their work environment. Figure 1 illustrates these results.

Figure 1

MGO Satisfaction with Current Work Environment



Two negative relationships were observed with regard to satisfaction with the work environment. Table 11 shows a negative correlation between participant ethnicity and the reported satisfaction with the work environment. This result could be skewed, however, due to the ethnicity demographic reported in the MGO participant population (i.e., the sample was dominated by 86.49% non-Hispanic or Latino participants.)

Table 11

Bivariate Correlation: Participant Ethnicity and Satisfaction with Work Environment

	Participant Ethnicity	Work Environment
Participant Ethnicity	--	-.225*
Work Environment	-.225*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

Similarly, Table 12 reflects a negative correlation between participant race and the reported satisfaction with the work environment. Again, however, the overwhelming presence of a single race in this sample (i.e., White or Caucasian) could account for the apparent relationship.

Table 12

Bivariate Correlation: Participant Race and Satisfaction with Work Environment

	Participant Race	Work Environment
Participant Race	--	-.189*
Work Environment	-.189*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

SQ6 was designed to determine whether job training was a factor in the MGOs perception of a viable work environment. The results were extremely close with 57 participants ($n = 48.31\%$) selecting “no” and 61 participants ($n = 51.69\%$) selecting “yes.” These results are worrisome; if almost half the MGO population believes they did not receive adequate training, how are they expected to perform job expectations? It must be noted that while $n = 48.31\%$ of the MGO participants selected “no,” they did not receive adequate job training, only $n = 3.42\%$ stated that this was a reason for leaving their past employment. This could mean that either MGOs are not equating job training with job performance, or they do not seem to think it is related to overall success. That being said, SQ2 was answered only by MGO participants who had previous positions as MGOs.

SQ7 asked participants whether work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment) affects their daily professional activities. A total of 109 participants ($n = 91.60\%$) selected “yes,” while 10 participants ($n = 8.40\%$) selected “no.” Participants in this study overwhelmingly believed work culture was important in constructing a

viable work environment. To further examine the import of work culture, SQ8 was designed using the Qualtrics skip-logic feature to further explore whether the MGOs who believed work culture to be important were satisfied with their work culture. SQ8 utilized a Likert-type scale to allow participants to indicate responses ranging from “not at all satisfied” (1) to “completely satisfied” (6) with their work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment). Figure 2 shows only eight ($n = 7.55\%$) participants were completely satisfied with their workplace culture and five participants ($n = 4.72\%$) were not satisfied at all. Most responses landed on satisfaction levels 4 and 5. Figure 2 represents these results.

Figure 2

MGO Satisfaction with their Work Culture

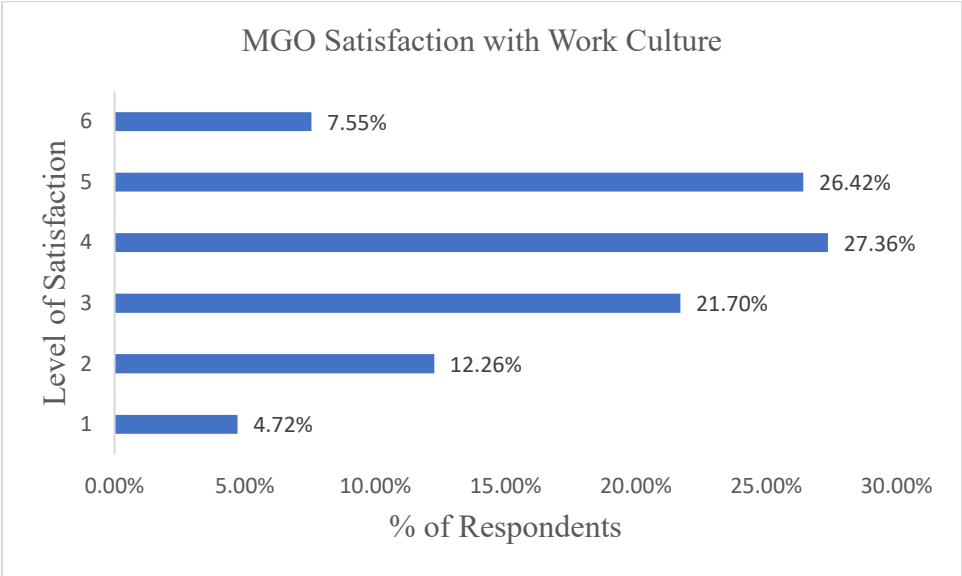


Table 13 shows there is a positive relationship between MGOs with previous work experience and the reported satisfaction with work culture.

Table 13*Bivariate Correlation: Previous Experience and Work Culture*

	Previous Experience	Work Culture
Previous Experience	--	.242**
Work Culture	.242**	--

**Correlation is significant at the $p < 0.01$ level (two-tailed).

To dig deeper into MGOs' perceptions of a viable work environment, SQ9 was designed to determine whether MGO participants feel valued in their role. In all, 32 participants ($n = 27.59\%$) selected "no," they do not feel valued, whereas 84 participants ($n = 72.41\%$) selected "yes." The bivariate correlation in Table 14 shows a positive correlation at the $p < 0.05$ level, indicating a relationship between participant MGO age and their perception of feeling valued at work. The population in this sample was dominated by age ranges 36-45 years ($n = 33.93\%$) and 46-55 years ($n = 28.57\%$). The relationship between age and the perception of feeling valued may indicate the older the participants the more valued they feel, and vice versa.

Table 14*Bivariate Correlation: Participant Age and Perceived Value*

	Participant Age	Value
Participant Age	--	.225*
Value	.225*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

While the nonprofit university foundation industry should be pleased with the percentage of employees who feel valued, nothing is learned about retention from those results. Therefore,

SQs10-18 were designed, using the Qualtrics skip-logic feature, to determine why those who stated they “don’t feel valued” feel that way.

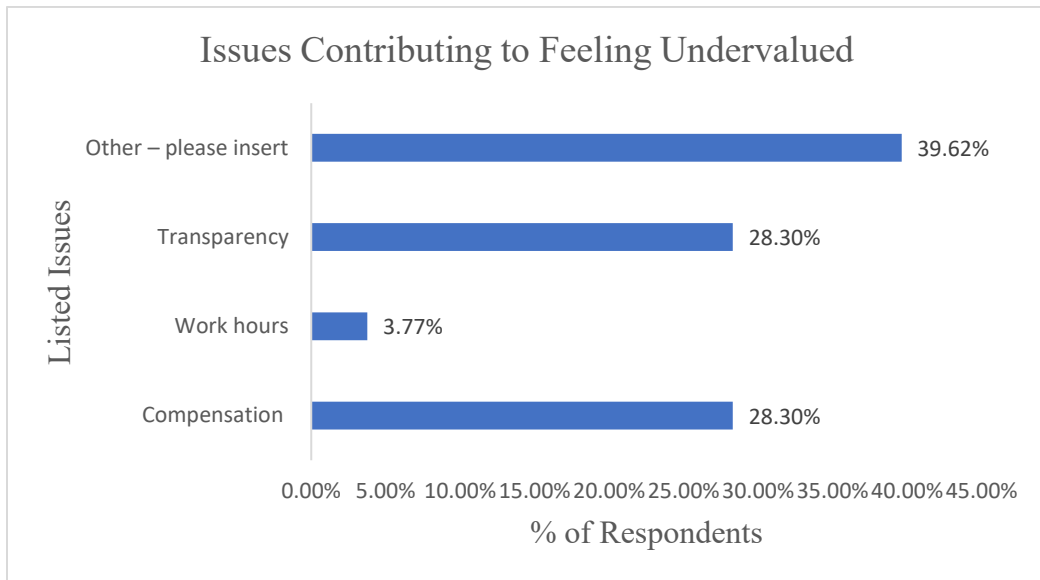
Figure 3 shows the responses to SQ10 where participants were asked whether compensation, work hours, transparency, or “other” reasons led to their feeling undervalued. Out of the listed options, 15 ($n = 28.30\%$) participants selected both compensation and transparency; therefore, these issues should be considered equally important contributors to MGO participants’ feeling undervalued. Only two participants ($n = 3.77\%$) selected work hours as an issue; 21 participants ($n = 39.62\%$) selected “other,” and 20 respondents chose to write their reasons for feeling undervalued. Much like the written responses reported as reasons for leaving past employment, some of the written responses are not industry-wide problems, but rather problems that the organization associated with the response should address. Such issues were sex discrimination and confusion about the language used for gift agreements, as well as philosophical differences. The responses that appeared multiple times by different respondents and have an industry-wide impact are listed below:

- lack of strategic planning;
- under sourced/ lack of resources to be successful/ limited assistance from bosses;
- experience not valued;
- lack of communication (both acknowledgment of a job well done, as well as organization expectations);
- metrics-driven environment (i.e., a lack of interest in the MGO, “cog in the machine that makes money,” “cynical cycle of enough is never enough,” “no consideration for variation in job responsibilities,” “uneven goals for MGOs with different size constituents”); and

- lack of professionalism (i.e., considered an afterthought to lead fundraisers and university personnel, organizational lack of trust with the MGO, disconnect between personal and organizational values).

Figure 3

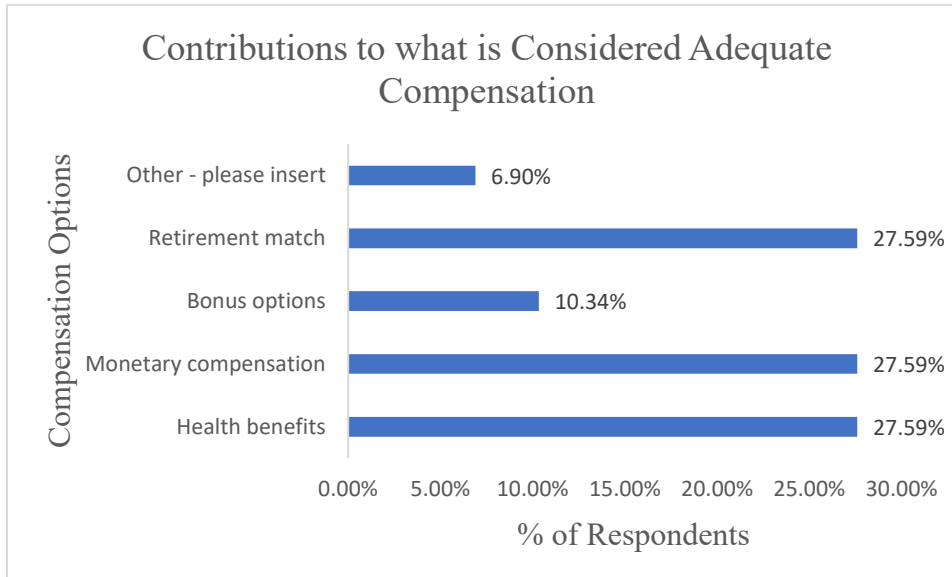
Issues Contributing to Feeling Undervalued



SQ11 further examined MGOs’ feeling undervalued by focusing on compensation. A total of 20 ($n = 64.52\%$) participants selected “no,” they do not feel adequately compensated for the work they do, while 11 participants ($n = 35.48\%$) selected “yes.” To understand “compensation,” SQ12 was designed to determine what MGOs consider to be adequate compensation. Health benefits and monetary compensation as well as retirement matches were equally selected by eight ($n = 27.59\%$) participants; three participants ($n = 10.34\%$) selected bonus options; and two participants ($n = 6.90\%$) opted to select “other.” Both wrote in their answers: tuition support for family and vacation and sick leave. Figure 4 represents these results.

Figure 4

Contributions to what is Considered Adequate Compensation



To continue exploring perceptions of value as an MGO, SQ12 gave participants the opportunity to write about what would make them feel more valued. Similar responses were recorded as SQ10. The five responses were as follows:

- “interest and support from leadership”;
- “being a part of the decision process, access to leaders, and growth opportunities”;
- “proper compensation, better resources, and more staff to support the work”;
- “instead of constant pressure, take time to celebrate successes”; and
- “acknowledgment of contributions by leadership.”

The researcher wanted to know if flexible work hours and response time from supervisors were factors in the perception of value. SQ13 evaluates flexible work hours; 22 ($n = 73.33\%$) participants selected “yes” to having flexible work hours, while eight participants ($n = 26.67\%$) selected “no.” SQ15 asked participants how long their supervisor typically takes to get back to them after asking for input. The answers varied; nine participants ($n = 30\%$) selected 1-4 hours;

ten participants ($n = 33.33\%$) selected 5-8 hours; five participants ($n = 16.67\%$) selected longer than 8 hours; and six participants ($n = 20\%$) selected longer than 24 hours. Work hours and supervisor response time have not been listed as complaints and do not seem to have an impact on MGO perceptions of value. What has been addressed many times and seems to be a problem in the nonprofit university foundation sector is transparency. SQ14 asked participants whether their organization is transparent (e.g., open and honest with employees about organizational matters.) A total of 22 participants ($n = 73.33\%$) selected “no” and only eight participants ($n = 26.67\%$) selected “yes.” To further understand transparency, SQ14 asked if participants were aware of upcoming foundation projects (e.g., fundraising campaigns, etc.). In all, 23 participants ($n = 76.67\%$) selected “yes,” while seven participants ($n = 23.33\%$) selected “no.” This suggests that MGO participants are aware of fundraising campaigns and information related to performing their jobs; however, they do not feel that their organizations are open and honest with them about organizational matters.

Understanding job expectations is important in constructing a viable work environment. SQ16 used a Likert-type scale to allow participants to indicate responses ranging from “not at all” (1) to “completely” (6) to determine whether participants understand their job expectations. The results, represented in Figure 5, were positive; 60 ($n = 52.63\%$) participants selected “completely” (6); 36 ($n = 31.58\%$) respondents selected 5; 13 participants ($n = 11.40\%$) selected 4; three participants ($n = 2.63\%$) selected 3; two respondents ($n = 1.75\%$) selected 2; and no participants selected 1. This suggests that all participants understand their job expectations to some degree.

Figure 5

Understanding Job Expectations

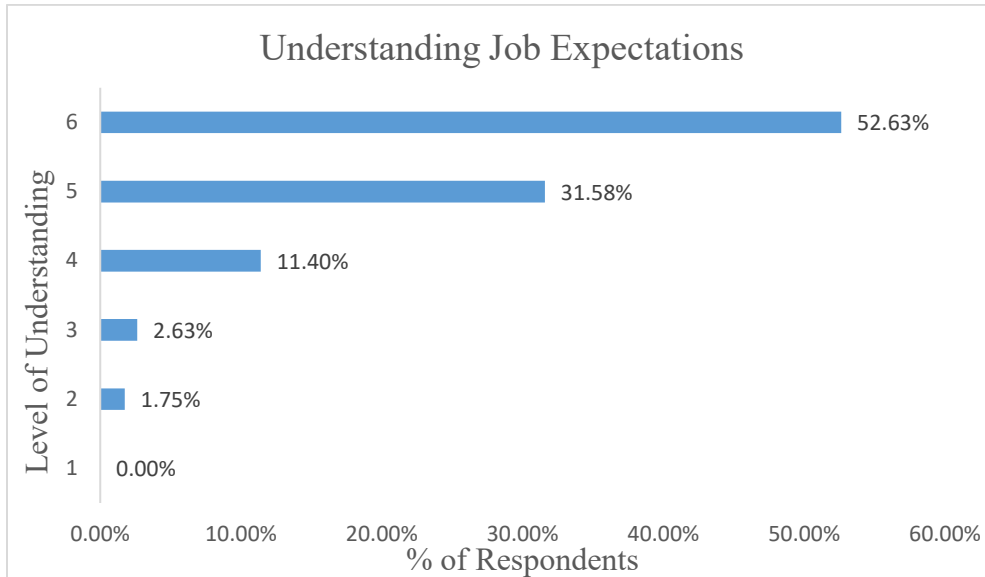


Table 15 shows the positive relationship between participant age and the understanding of job expectations. Again, this study was dominated by participants in the age range of 36-55 years. A relationship between understanding job expectations and the middle age demographic makes sense as this is the age demographic where MGOs would have had time to hone their skills as development officers, versus younger (i.e., 35 years or less) or older (i.e., 56 years or older) MGOs who might be starting their careers as development officers or ending it.

Table 15

Bivariate Correlation: Participant Age and Understanding Job Expectations

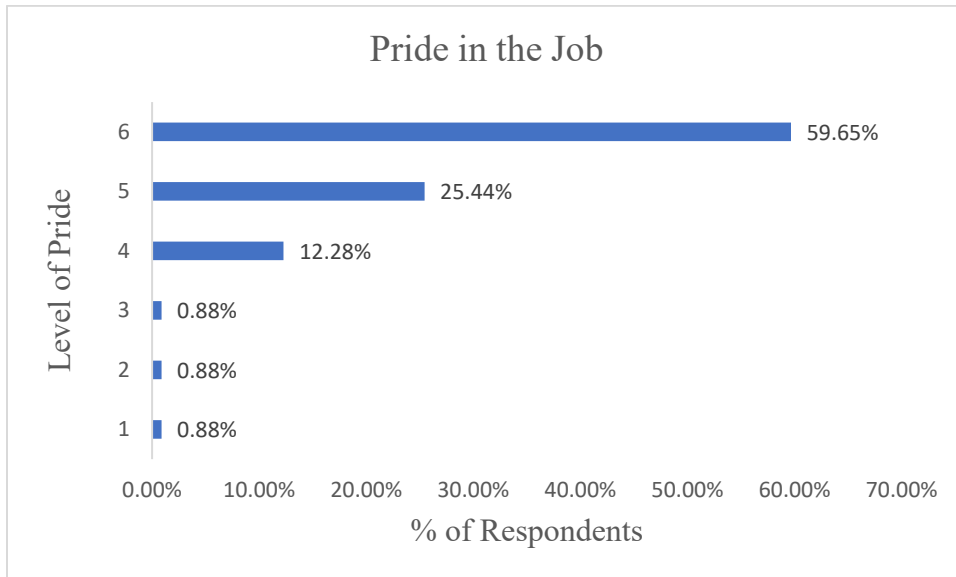
	Participant Age	Understanding Job Expectations
Participant Age	--	.398**
Understanding Job Expectations	.398**	--

**Correlation is significant at the $p < 0.01$ level (two-tailed).

A similar stacked graph to Figure 5, seen in Figure 6, is shown for SQ17, where participants were asked to use a Likert-type scale to indicate responses, ranging from “not at all important” (1) to “quite a lot” (6,) how much pride they have in the work they do. A total of 69 ($n = 59.65\%$) participants selected 6; 29 participants ($n = 25.44\%$) selected 5; 14 respondents ($n = 12.28\%$) selected 4; and fields 1, 2, and 3 had one participant ($n = 0.88\%$) each.

Figure 6

Determining Pride in the Job as MGO



Two relationships also emerged in relation to pride in the role of MGO. One, reported in Table 16, reflects a positive relationship between participant age and the level of pride in the job. The sample population age majority fell in the age category 35-55 years of age. Indicating middle aged participants felt the most pride in their work.

Table 16*Bivariate Correlation: Participant Age and Pride*

	Participant Age	Pride
Participant Age	--	.260**
Pride	.260**	--

**Correlation is significant at the $p < 0.01$ level (two-tailed).

Additionally, a positive relationship between participant gross income and pride in the role as MGO is reported in Table 17. Majority of the sample population made \$60,000 or more ($n = 83.78\%$). This relationship indicated the higher the salary, the more pride participants felt in their role.

Table 17*Bivariate Correlation: Participant Gross Income and Pride*

	Participant Gross Income	Pride
Participant Gross Income	--	.196*
Pride	.196*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

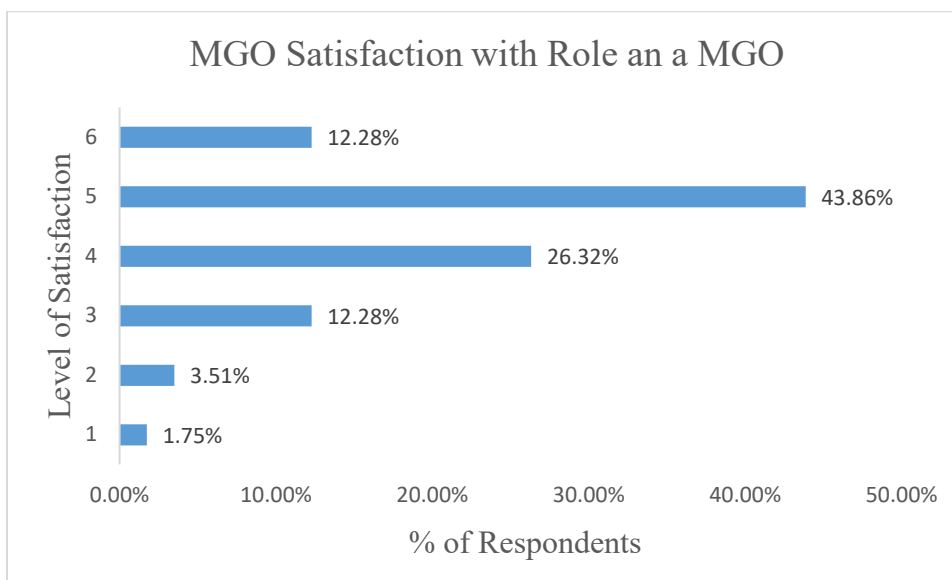
Findings Related to Research Question Three: From the MGOs perspective, what can employers do to encourage MGOs to continue working for the organization?

To understand the retention of major gift officers in nonprofit university foundations, it is vital to comprehend what MGOs perceive as important for continued employment. Many of the aforementioned survey questions and results can be considered under this research question, but to home in on employers encouraging MGOs to stay, SQ19 was created to determine the satisfaction level of MGOs in their roles. By using a Likert-type scale, SQ19 asked participants

to report how satisfied they are with their role as an MGO. The range was “very unsatisfied” (1) to “very satisfied” (6). Most participants responded with a 4 or higher. A total of 14 participants ($n = 12.28\%$) selected 6; 50 respondents ($n = 43.86\%$) selected 5; 30 participants ($n = 26.32\%$) selected 4; 14 participants ($n = 12.28\%$) selected 3; four respondents ($n = 3.51\%$) selected 2; and two ($n = 1.75\%$) participants stated they were very unsatisfied.

Figure 7

MGO Satisfaction with Role as an MGO



The results, seen in Figure 7, are positive indicators that MGOs are satisfied with their roles. With this information, employers can look for and implement incentives to keep MGOs employed. SQ20 asked whether there were incentives for meeting performance expectations. In all, 87 ($n = 76.32\%$) participants selected “no,” and 27 participants ($n = 23.68\%$) selected “yes.” To further examine incentives, SQ21 was designed using the Qualtrics skip-logic feature to determine what incentives were offered. A total of 19 participants ($n = 73.08\%$) selected monetary bonuses; one participant ($n = 3.85\%$) selected commission; and no participants selected

extra time off. There was an option to select “other”; six ($n = 23.08\%$) participants selected this option, of which five wrote a response:

- “not getting fired”;
- “tremendous flexibility”;
- “monetary bonuses based on organizational performance rather than individual performance”;
- “team-based incentive compensation program”; and
- “the opportunity for advancement or future compensation in form of a raise.”

SQ21 asked if extra time off or monetary bonuses would incentivize MGOs to work harder. As a result, 55 participants ($n = 63.95\%$) selected “yes,” and 31 participants ($n = 36.05\%$) selected “no.” To wrap up incentives in the nonprofit university foundation industry, SQ22 gave participants an opportunity to construct responses if there was anything other than a monetary bonus or extra time off that motivates (or would motivate) them to reach their job expectations. From this, 80 responses were recorded, and they are summarized below:

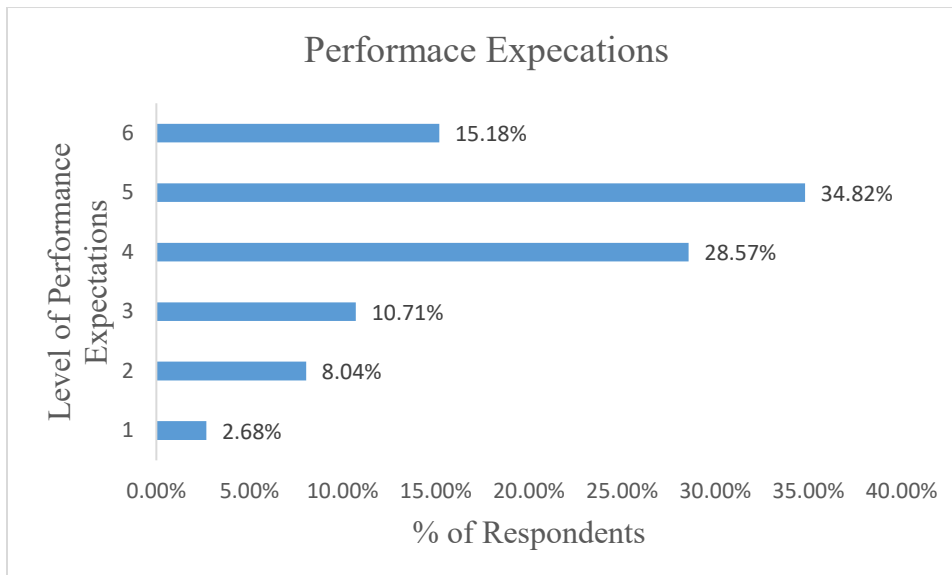
- acknowledgment from leadership, appreciation, and recognition;
- opportunities for promotion, autonomy, and to climb the career ladder;
- fear of failing, “being shamed by the organization for not reaching goals”;
- intrinsic motivators (self-pride, satisfaction with good work, sense of accomplishment, personal competitiveness);
- remote work opportunities and more flexibility;
- desire to impact the institution, attaining private support for the organization to thrive, feelings of adding value to the institution, helping donors and students;
- opportunities to grow and develop as a fundraiser; and

- being treated as a professional (desire for being valued and respected).

The researcher continued to assess, from the MGO's perspective, what employers could do to keep them employed by inquiring about performance expectations. Figure 5 illustrated that MGOs overwhelmingly understand the job expectations. SQ23 was designed to explore how realistic the performance expectations are. The responses show that $n = 78.57\%$ of the participants felt that their performance expectations are realistic. Figure 8 shows that three ($n = 2.68\%$) of the respondents for this question selected 1, indicating that their performance expectations are not at all realistic; nine ($n = 8.04\%$) of the respondents selected 2; 12 ($n = 10.71\%$) of respondents selected 3; 32 ($n = 28.57\%$) of respondents selected 4; 39 ($n = 34.82\%$) of respondents selected 5; and 17 ($n = 15.18\%$) of participants selected 6, which indicated they believe their performance expectations are very realistic.

Figure 8

How Realistic are the Performance Expectations



Furthermore, two correlations emerged for realistic work performance expectations. The first, shown in Table 18, depicts a negative relationship between realistic work performance expectations and participant race. Again, however, the overwhelming presence of a single race in this sample (i.e., White or Caucasian) could account for the apparent relationship.

Table 18

Bivariate Correlation: Participant Race and Realistic Performance Expectations

	Participant Race	Performance Expectations
Participant Race	--	-.211*
Performance Expectations	-.211*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

The second correlation between realistic performance expectations and MGOs who had previous work experience is positive and is represented in Table 19. This indicates that MGOs who had previous work experience believe the performance expectations of their current role are realistic.

Table 19

Bivariate Correlation: Previous Experience and Realistic Performance Expectations

	Previous Experience	Performance Expectations
Previous Experience	--	.241*
Performance Expectations	.241*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

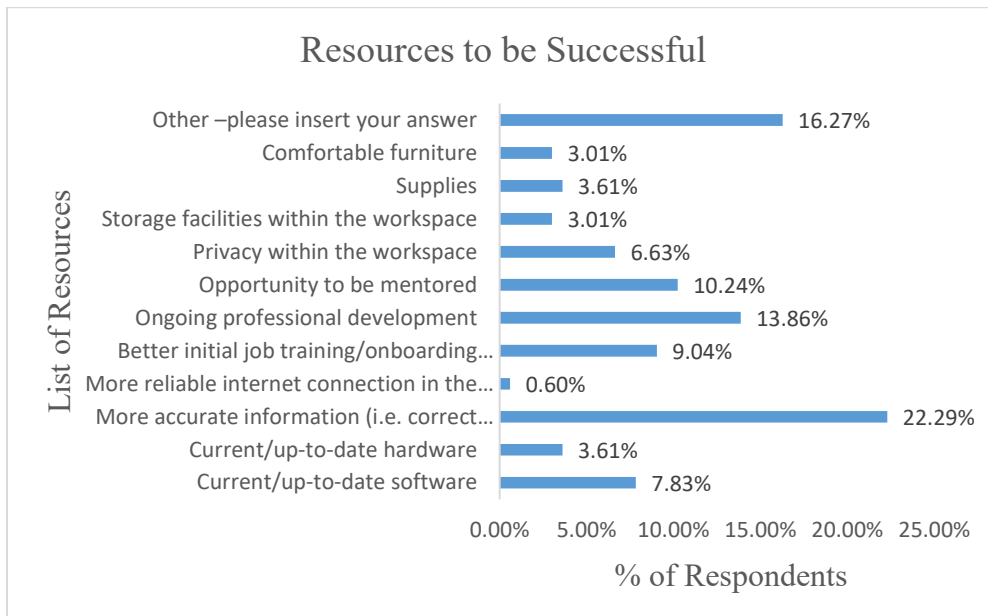
A clear path to climbing the organizational ladder has been reported as a desire of the participants in this study. Numerous written responses for SQ22 as well as SQ10 indicated that MGOs want growth and the opportunity to climb the organizational ladder. SQ24 asked

participants if there is a clear path to climbing the organizational ladder in their organization. As expected, 88 ($n = 79.28\%$) of the respondents selected “no”; and 23 participants ($n = 20.72\%$) selected “yes.”

SQ25 was created to determine whether resources to be successful in the job were something MGOs desired and could help employers with retention. When asked, “Do you feel that you have adequate resources to be successful in your job?” 62 ($n = 54.87\%$) participants selected “yes”; and 51 participants ($n = 45.13\%$) selected “no.” Using the Qualtrics skip-logic feature, the participants who selected “no” were prompted to answer the next question that inquired about what resources were needed. Multiple responses were permitted. Figure 9 shows that 37 ($n = 22.29\%$) of the respondents require “more accurate information (i.e., correct prospect details/contact information)”; 27 participants ($n = 16.27\%$) selected “other,” but failed to insert an answer when prompted; 23 ($n = 13.86\%$) of the respondents selected “ongoing professional development”; 17 ($n = 10.24\%$) participants selected “opportunity to be mentored”; 15 ($n = 9.04\%$) of the participants selected “better initial job training/onboarding process”; six ($n = 3.61\%$) of the participants selected “current/up-to-date hardware” and “supplies”; five ($n = 3.01\%$) of the participants selected “storage facilities within the workspace” and “comfortable furniture” respectively; and one ($n = 0.60\%$) participant selected “more reliable internet connection in the workplace.”

Figure 9

Which Resources are needed to be Successful?



Several relationships also emerged in relation to resources to be successful in the position of MGO. One, reported in Table 20, reflects a negative relationship between participant sex and the resources required to be successful. The participants were $n = 57.14\%$ female and $n = 40.18\%$ male. The results indicate that sex did not influence whether the MGO participants felt resources were overwhelmingly important to overall success.

Table 20

Bivariate Correlation: Participant Sex and Resources to be Successful

	Participant Sex	Resources
Participant Sex	--	-.189*
Resources	-.189*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

Additionally, a negative correlation is depicted in Table 21 between participant race and resources to be successful. It is possible that the result is skewed due to the race demographic being dominated by a single race (i.e., $n = 85.34\%$ White or Caucasian.)

Table 21

Bivariate Correlation: Participant Race and Resources to be Successful

	Participant Race	Resources
Participant Race	--	-.186*
Resources	-.186*	--

*Correlation is significant at the $p < 0.05$ level (two-tailed).

Furthermore, Table 22 displays a negative correlation between the MGOs with previous work experience and the access to resources to be successful in the role of MGO. Previous experience had no influence over the current employments resources to be successful.

Table 22

Bivariate Correlation: Previous Experience and Adequate Resources to be Successful

	Previous Experience	Resources
Previous Experience	--	-.247**
Resources	-.247**	--

**Correlation is significant at the $p < 0.01$ level (two-tailed).

The final question of the survey asked participants to add any comments or concerns they have as an MGO in the nonprofit university foundation to better the industry. A total of 55 responses were recorded and are summarized below:

- enhance retention (“continual turnover is a huge problem”);

- a new approach to metrics (fundraising expectations of annual growth needs to be reevaluated, focus on relationships managed, and more value needs to be placed on encouraging MGOs to build long-term relationships with donors);
- increase transparency and communication between leadership and MGOs;
- increase support (both support staff and management tools to enhance donor engagement, as well as the resources previously mentioned);
- more engagement from departments in development and stewardship activities;
- provide clear job descriptions, onboarding aligned with career paths, and opportunities for MGOs to grow and climb the organizational ladder;
- increase training opportunities;
- compensation (incentives/bonuses, not solely based on fundraising metrics, but consider relationships managed);
- manage university expectations and cooperation between university and foundation;
- better collaboration between the annual fund, major giving, and alumni relations;
- increase diversity in the industry;
- increase teamwork goals (silos create an environment of secrecy);
- respect for the profession from university deans and administration;
- better research tools for donors and leads;
- emphasize mission; intrinsic values amongst MGOs are high;
- embrace remote work opportunities and flexibility; and
- implement different goals for different levels of MGO experience.

Summary

The purpose of this study was to examine the retention of major gift officers (MGOs) in nonprofit university foundations in the interest of determining what is important to MGOs to remain employed at their current nonprofit university foundation. The analyzed data yielded notable findings regarding MGOs perceptions. MGOs had a strong desire to be acknowledged and recognized for good work; they wanted to climb the organizational ladder and have opportunities to grow professionally. Overwhelmingly intrinsically motivated, they still wanted to be respected and compensated adequately. Compensation, lack of transparency, career advancement opportunities (or the lack thereof), no clear path to climb the organizational ladder, and a lack of training were listed as reasons MGOs leave their employment. These findings and their implications will be examined in the next chapter.

CHAPTER 5

SUMMARY, IMPLICATIONS, AND RECOMMENDATIONS

High turnover has been an ongoing issue for nonprofit foundations since their inception (Muslic, 2017). Universities rely on their foundations to generate private funds to support the university with learning opportunities, research endeavors, and student support, as well as capital projects. Therefore, high turnover in university foundations is problematic as foundations serve their affiliated universities. The reported tenure of MGOs is currently 16-24 months (Bakker, 2017; Burk, 2013; Nagul, 2020; Perry & Schreifels, 2019; Rizkallah, 2020). With the basis of fundraising being a long-term game (Brooke 2018; Giddens 2020), high turnover results in fewer relationships between the university foundation and its donors and ultimately fewer fundraised dollars.

This study analyzed currently employed MGOs to understand, from their perspective, what can be done to improve retention rates in nonprofit university foundations.

Purpose of the Study

The purpose of this study was to examine the perceptions of major gift officers (MGOs) in nonprofit university foundations, in the interest of determining what is important to MGOs to remain employed at their current nonprofit university foundations. This study sought to add to existing research on retention in nonprofit university foundations and its effects on fundraising for higher education. The following three research questions were asked to address this purpose:

Research Question 1: What are the main reasons that MGOs leave their current employment?

Research Question 2: What do MGOs perceive as important in constructing a viable work environment?

Research Question 3: From the MGOs perspective, what can employers do to encourage MGOs to continue working for the organization?

Population

Using the National Center for Education Statistics (NCES) database to limit the participants to public, four-year institutions throughout the United States, the researcher randomly selected the research population. Initially, 656 currently employed major gift officers (MGOs) were identified from the 61 universities listed in Appendix A. Due to email addresses being returned or failing to send, the audience size was reduced to 611 participants. Participants were given four weeks to complete the survey. At the end of the data collection period, 126 surveys were submitted. Of those 126, some were only partially completed, but the responses were included as appropriate.

Survey Response Rate

Over five hundred ($N = 611$) major gift officers (MGOs) were sent the instrument link, and 126 recorded responses spanning a collection period of four weeks were received. Of that 126, some were only partially completed, but the responses were included as appropriate. The response rate was 20.62%.

Summary of Findings

The survey designed for this study utilized both qualitative and quantitative research methods. For clarity on certain questions, participants were encouraged to write in responses. The last part of the survey was composed of demographic questions.

Research Question 1 was developed to understand the main reasons that MGOs leave their employment at nonprofit university foundations. There have been several studies conducted on the longevity of MGOs in their positions and the negative implications on foundations when

turnover is high (Bakker, 2017; Burk, 2013; Nagul, 2020; Rizkallah, 2020). Hrywna (2019) noted that the most prominent challenge to nonprofit organizations was employee turnover. Several common themes emerged in that body of research as to why MGOs left their positions, among lack of training, limited experience, perceptions of being under- or un-valued, poor compensation, and unrealistic expectations (Joslyn, 2019; Meyer, 2020; Papp, 2019; Schoshinski, 2017; Towner, 2019; Witters & Agrawal, 2015). Slow career growth and few promotions were also listed as reasons MGOs changed their jobs so frequently (Thomas, 1996). This research question aimed to understand, from the MGO population's perspective, whether these reasons to leave their employment remain valid. The survey items for this research question included SQ1 through SQ4.

The results generated from the intended years of employment contradict the previous research of the industry average being between 16 to 24 months (Bakker, 2017; Burk, 2013; Nagul, 2020; Perry & Schreifels, 2019; Rizkallah, 2020). The participants in this study intend to work, in relatively equal proportions, for 2-5 years, 6-10, or more than 10 years. Only $n = 7.38\%$ of the participants selected two years or less. The same contradiction was seen in the years of previous employment. Participants in this study ($n = 52.04\%$) lasted ten-plus years at their previous nonprofit organization. A reason for this result may be due to the demographics of the participants. Participants in this study were mostly between the ages of 36-55 years, they mostly ($n = 83.78\%$) reported a gross income of \$60,000 or more, and almost all had a college degree ($n = 99.11\%$). These demographics could result in MGO participants valuing their positions within their organizations.

The MGO participants in this study reported feeling undervalued, unsatisfactory compensation, a lack of training, few opportunities for career advancement, few opportunities to

expand their knowledge in the field of fundraising, lack of professional growth and development, desire for control of fundraising strategies, and the desire to take on a larger role within the foundation were as reasons for leaving their previous employment. These reasons are in line with previous research and emphasize the desire felt by MGOs to not only be adequately compensated for their work, but also, to have the opportunity to grow professionally.

Research Question 2 was designed to understand what MGOs perceive as important in constructing a viable work environment. Previous research indicated that job fit, career advancement opportunities, and work environment were the most important factors in retention (Bersin, 2013). SQ5-SQ18 were used to answer Research Question 2.

MGO satisfaction was important to understand. On average, the results were that the MGO participant population was satisfied with their current work environment. Dr. Jacobs (2018) accredits appropriate training and understanding of organizational goals for the longevity of MGOs within university foundations. The MGO participants in this study all reported understanding their job expectations to some degree, however almost half the MGO population in this study did not believe they received adequate training. Not many participants accredited lack of job training to the reason for leaving their past employment, this could mean that either the MGOs did not equate job training with their job performance, or they did not seem to think it is related to overall success. However, they indicated that job training was a factor influencing their perceptions of a viable work environment.

Previous research showed a significant correlation between work culture and the longevity of employees (Tsai, 2011; Jacobs & Roodt, 2008). Participants in this study overwhelmingly ($n = 91.60\%$) reported work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment) affects their daily professional activities. The

participants also confirmed that the MGOs who believed work culture to be important also reported overall satisfaction with their work culture. They too confirmed feeling valued in their role as MGO.

As previously reported, nothing is learned about retention from those who feel valued. Therefore, the study focused on the MGOs who felt undervalued or not valued at all. Compensation and transparency within the organization were common reasons. Retention of employees stems from valued compensation (Mulvey et al., 2002). This study confirmed $n = 64.53\%$ of the participants do not feel adequately compensated for the work they do. MGO participants were allowed to write in reasons for this; many responses echoed the above two complaints and confirm previous research. New problems emerged, however, and are as follows: lack of strategic planning; under-sourced/lack of strategic planning; limited assistance from bosses; experience not valued; lack of communication; metrics-driven; uneven goals for MGOs with different size constituents; and a lack of professionalism.

MGOs were given the opportunity to write about what would make them feel more valued in their position. The answers were recorded in Chapter 4 and reiterated here. To feel valued, MGOs participants want an opportunity to be part of the decision-making process, an opportunity for growth, less pressure, support from leadership, and again, adequate compensation and better resources. Flexible work hours and response time from leadership were not seen as an issue in this study.

Papp (2019) highlighted the necessity for transparency between university foundation leadership and its employees about campaigns, projects, and finances for overall organizational success. This study confirmed that MGOs are aware of upcoming projects and information related to job performance; however, they do not feel that their organizations are open and honest

with them about organizational matters. MGOs in this study also reported understanding their job expectations and having pride in the work that they do.

Research Question 3 was designed to determine, from the MGO's perspective, what employers could do to encourage MGOs to continue working for the organization. Results from this study indicated that MGOs were largely satisfied with their roles and felt that their work expectations were realistic and achievable. They indicated an interest in incentives for good performance, such as monetary bonuses and the opportunity for advancement. As previous research indicated, overall satisfaction with adequate compensation, whether in the form of recognition, time off, flexible work hours, or pay, resulted in higher retention (Cranny et. al., 1992).

The reported satisfaction by the participants in this study was in line with Frederick Herzberg's two-factor theory on job satisfaction (Stone, 2020). Herzberg theorized for employees to not be dissatisfied, work hygiene (i.e., job security, salary, culture, and organizational policies) would have to be acceptable (Frederick, 2003). However, for employees to be satisfied, they require motivators (i.e., advancement, opportunities, and recognition) (Stone, 2020). The participants in this study emphasized this point.

MGOs in this study expressed a desire to be acknowledged, appreciated, and recognized for their work and a strong aspiration to climb the organizational ladder and add value to the organization. Throughout this study, intrinsic motivators (e.g., self-pride, satisfaction with good work, sense of accomplishment, and personal competitiveness) were observed in responses from MGOs and confirm previous studies on the importance of fundamental values for retention (Greiger, 2020).

The last survey question gave participants the opportunity to share their opinions to improve the nonprofit university foundation industry. These responses highlighted the issue of high turnover and the problems that are associated with retention. The responses generated notable findings regarding MGOs' perceptions of the industry, reflecting a strong desire to be recognized and acknowledged for good work, they want to have the opportunity to climb the organizational ladder, and to develop professionally. Poor compensation, lack of transparency, few career advancement opportunities, the absence of a clear path to climb the organizational ladder, and a lack of training were listed as problems with the industry and reasons why MGOs chose to leave their employment.

Discussion

The findings found in this research study are consistent with previous studies regarding MGO perceptions of work culture, work environment, feeling valued, and the problems related to retention in nonprofit university foundations. Previous studies emphasized the desire for adequate pay, opportunities for growth within the organization, the need for transparency, and a desire to be recognized by leadership in order to feel valued as an MGO.

Previous studies shed light on the role of an MGO within university foundations and the fact that nonprofit work is typically intrinsically motivated. The MGO participants in this study confirmed this but added that intrinsic values alone are not enough to remain employed if respect and adequate compensation are lacking.

One discrepancy that was notable was the difference in the intended years of work, and the previous years of work as an MGO, compared to the reported industry average of 16-24 months (Bakker, 2017; Burk, 2013; Nagul, 2020; Perry & Schreifels, 2019; Rizkallah, 2020). This discrepancy could be due to this study being limited to currently employed MGOs.

Implications for Practice

This study was an extension of previous studies on retention in nonprofit organizations. This study, however, focused specifically on retention in nonprofit university foundations and the perceptions of currently employed major gift officers (MGOs). Through analysis of perceptions provided by the MGO participants, insight into better retention practices is provided.

The data collected suggest the younger the participants, the more likely they are to change jobs due to unsatisfactory compensation and feeling undervalued. Per review of literature, limited experience is also cited as a problem by MGOs (Joslyn, 2019; Meyer, n.d.; Papp, 2019; Schoshinski, 2017; Towner, 2019; Witters & Agrawal, 2015). Perhaps younger, less experienced hires could start their fundraising careers in a position preceding the MGO level (i.e., call center at the university foundation, annual fund work, stewardship officer, etc.). This model ensures the new hire has adequate time to consider job-fit and also provides employees with career-advancement opportunities as they move from an elementary fundraising position to MGO. Job fit and career advancement are the two most important factors in retention (Bersin, 2013).

This study highlighted the emphasis MGOs put on advancing their career, taking on more responsibility, and expanding their knowledge in the field. The MGOs in this study made it clear that they had a “desire to take on a bigger role” within their foundations. They aspired to professional growth, professional development, and control of fundraising strategies. “Not enough major gift and planned giving work” was listed as a reason an MGO left their previous employment. Organizations hire MGOs to perform these functions, and can implement better retention practices by simply offering more responsibility to retain skilled and willing workers. By offering professional development classes or sending MGOs to professional development seminars MGOs will have the opportunity they crave to grow within their roles and

professionally. Training opportunities for foundation leadership as well as MGOs inspire an environment of teamwork and encouraged learning as solutions to the problem of expanding knowledge, professional growth, and have the ability to inspire a lifelong career in nonprofit organizations (Weissbein, 2020).

The perception of “value” was a reoccurring desire stated by MGOs in this study. Witters and Agrawal (2015) reported engaged and valued employees are 59% less likely to change jobs. The implications for foundations from the MGO participant results are as follows.

- MGOs are mostly intrinsically motivated, if they are given the flexibility to work with their donor prospects. With support given by leadership, they may feel more trusted in their positions and have an inclination to enhance performance in their role.
- MGOs are drawn to nonprofit organizations because of the mission and the meaningfulness of the work, but the retention of qualified employees is dependent upon their perceptions of being value within the position (Knapp et. al., 2017).
- The management of donors and potential donor prospects by MGOs who feel valued results in sustainable growth of nonprofit university foundations (Brazzell, 2019).

The data in this study concerning adequate job training could be an area organizations home in on. Only 50% of the participants claimed to have had adequate job training, and the MGOs in this study did not conflate job training with job performance. Organizations have the opportunity to focus on job training to assess whether it affects overall fundraising success. Jacobs (2018) emphasized that the longevity of nonprofit university foundation employees is reliant on a formal onboarding process that includes training emphasizing organizational objectives and instituting metrics for success.

While adequate compensation is always the goal, it is sometimes difficult to achieve in the nonprofit sector. The MGO participants in this study emphasized their desire to be recognized, climb the organizational ladder, grow as fundraising professionals, add value to their organizations, and work in an environment that is transparent (e.g., MGO leaders are open and honest with employees about organizational matters.) These are areas that are easily achievable by organizations and have the ability to curb the revolving door of MGOs.

Recommendations for Further Study

The purpose of this study was to examine the retention of major gift officers (MGOs) within nonprofit university foundations in the interest of determining what is important to MGOs to remain employed. The research was designed to gather data on currently employed MGOs to determine their perceptions of the work environment in the hope of solving retention issues in nonprofit university foundations. This study was intended to contribute to the existing body of literature related to turnover and retention in nonprofit university foundations. The knowledge gained through this study provides an opportunity for further research.

1. This study was limited to currently employed MGOs. Future endeavors could pursue MGOs who have recently left their employment to get a better understanding of retention as well as work culture, environment, and reasons for leaving.
2. Perceptions of this study were limited to currently employed MGOs. A broader understanding of retention in nonprofit university foundations could be derived from interviews with other members of staff within university foundations and/or MGOs who have vacated their positions.

3. This study was limited to foundations that were associated with public, four-year university institutions. A broader study incorporating all university foundations may provide significant insight into the retention of MGOs.
4. This study focused on non-profit foundations. A study focusing on private universities and their associated foundations may provide insight into the retention of MGOs.
5. This study found a relationship between participant sex and the resources required to be successful in the position. A study exploring this relationship may provide insight into the importance of resources based on the participant's sex.
6. This study included universities and their accompanying foundations of all sizes. Separate studies focusing on university foundations with large, mid-sized, or small endowments may provide insight into the retention of MGOs.

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Appendix A: Institutional Review Board Approval Letter



Office of Research Integrity
Institutional Review Board
One John Marshall Drive
Huntington, WV 25755

FWA 00002704
IRB1 #00002205
IRB2 #00003206

March 23, 2022

Eugenia Lambert, Ed.D
Leadership Studies, COEPD

RE: IRBNet ID# 1886897-1
At: Marshall University Institutional Review Board #2 (Social/Behavioral)

Dear Dr. Lambert:

Protocol Title: [1886897-1] Retention Issues in Nonprofit University Foundations
Site Location: MU
Submission Type: New Project APPROVED
Review Type: Exempt Review

In accordance with 45CFR46.104(d)(2), the above study was granted Exempted approval today by the Marshall University Institutional Review Board #2 (Social/Behavioral) Designee. No further submission (or closure) is required for an Exempt study unless there is an amendment to the study. All amendments must be submitted and approved by the IRB Chair/Designee.

This study is for student Sarah Kay.

If you have any questions, please contact the Marshall University Institutional Review Board #2 (Social/Behavioral) Coordinator Lindsey Taylor at (304) 696-6322 or l.taylor@marshall.edu. Please include your study title and reference number in all correspondence with this office.

Sincerely,

A handwritten signature in blue ink that reads 'Bruce F. Day'.

Bruce F. Day, ThD, CIP
Director, Office of Research Integrity

Appendix B: List of Universities Included in this Study

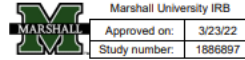
Below is the list of public, four-year universities included in this study.

- Appalachian State University, North Carolina
- Arkansas Tech University, Arkansas
- Auburn University, Alabama
- Augusta University, Georgia
- Ball State University, Indiana
- Bellevue College Foundation, Washington State
- Boise State University, Idaho
- California State University-Bakersfield, California
- California State University-San Marcos, California
- Central Connecticut State University, Connecticut
- Central Michigan University, Michigan
- Clemson University, South Carolina
- Cleveland State University, Ohio
- Colorado Mesa University, Colorado
- Columbus State University, Ohio
- Eastern Kentucky University, Kentucky
- Florida Atlantic University, Florida
- Florida International University, Florida
- Florida State University, Florida
- George Mason University, Virginia
- Gulf Coast State College, Florida

- Idaho State University, Idaho
- Illinois State University, Illinois
- Indiana State University, Indiana
- Marshall University, West Virginia
- Midwestern State University, Texas
- Minot State University, North Dakota
- Mississippi State University, Mississippi
- Missouri Western State University, Missouri
- Montana State University, Montana
- North Carolina State, North Carolina
- Northeastern Illinois University, Illinois
- Northern Kentucky University
- Ohio University, Ohio
- Purdue University, Indiana
- Rutgers University, New Jersey
- Salisbury University, Maryland
- Shippensburg University, Pennsylvania
- South Dakota State University, South Dakota
- Texas Southern University, Texas
- The Ohio State University, Ohio
- The University of Rhode Island, Rhode Island
- Toledo University, Louisiana
- University of Alaska, Alaska

- University Of Central Oklahoma, Oklahoma
- University of Colorado, Colorado
- University of Georgia, Georgia
- University of Kentucky, Kentucky
- University of Massachusetts, Massachusetts
- University of Michigan, Michigan
- University of Nebraska at Omaha, Nebraska
- University of New Mexico, New Mexico
- University of Pittsburgh, Pennsylvania
- University of Utah, Utah
- University of Vermont, Vermont
- University of Washington, Washington
- University of Western Oregon, Oregon
- Utah State University, Utah
- West Virginia University Foundation, West Virginia
- Western Kentucky University, Kentucky
- William and Mary University, Virginia

Appendix C: Survey Invitation and Consent Form



Anonymous Survey Consent

You are invited to participate in a research project entitled “Retention Issues in Nonprofit University Foundations” designed to analyze major gift officer (MGO) work perceptions within their nonprofit university foundation. The study is being conducted by Dr. Eugenia Lambert and Sarah Kay from Marshall University and has been approved by the Marshall University Institutional Review Board (IRB). This research is being conducted as part of the dissertation requirements for Sarah Kay.

This survey is comprised of thirty-five questions. Your replies will be anonymous, so do not type your name anywhere on the form. There are no known risks involved with this study. Participation is completely voluntary and there will be no penalty or loss of benefits if you choose to not participate in this research study or to withdraw. Due to the sensitivity of some of the questions, please be careful not to identify yourself in the open-ended answers. If you choose not to participate you can leave the survey site. You may choose to not answer any question by simply leaving it blank. Once you complete the survey you can delete your browsing history for added security. Completing the online survey indicates your consent for use of the answers you supply. If you have any questions about the study you may contact Eugenia Lambert at 304-633-3517 or Sarah Kay at 304-633-6868.

If you have any questions concerning your rights as a research participant you may contact the Marshall University Office of Research Integrity at (304) 696-4303.

By completing this survey you are also confirming that you are **18** years of age or older.

Please print this page for your records. Please press the next button to proceed to the survey.

Appendix D: Survey Instrument: Retention in Nonprofit University Foundations
Retention in Nonprofit University Foundations

Start of Block: Consent

You are invited to participate in a research project entitled “Retention Issues in Nonprofit University Foundations” designed to analyze major gift officer (MGO) work perceptions within their nonprofit university foundation.

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If you have any questions concerning your rights as a research participant you may contact the Marshall University Office of Research Integrity at (304) 696-4303.

By completing this survey you are also confirming that you are 18 years of age or older.

You may print this page for your records. Please answer the question of consent to proceed to the survey.

- I consent to this survey (1)
- I do not consent to this survey (2)

Skip To: End of Survey If You are invited to participate in a research project entitled "Retention Issues in Nonprofit Univ... = I do not consent to this survey

Q1 Prior to your current position at the nonprofit university foundation, did you have previous experience in a nonprofit organization?

- Yes (1)
- No (2)

Display This Question:

If Prior to your current position at the nonprofit university foundation, did you have previous expe... = Yes

Q2 How many years of prior nonprofit experience did you have?

<2 (1)

2-5 (2)

6-10 (3)

>10 (4)

Display This Question:

If Prior to your current position at the nonprofit university foundation, did you have previous expe... = Yes

Q3 What was your reason for leaving your previous position?

Unsatisfactory compensation (1)

Feeling undervalued (2)

Lack of training (3)

Other (4) _____

Page _____

Break

Q4 How many years do you intend to work at your current university nonprofit?

- <2 (1)
 - 2-5 (2)
 - 6-10 (3)
 - >10 (4)
-

Q5 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how satisfied are you with your current work environment?

- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)

Q7 Do you believe you received adequate training before starting your current position as an MGO?

No (1)

Yes (2)

Q8 Does the work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment) affect your daily professional activities?

Yes (1)

No (2)

Display This Question:

If Does the work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workpl... = Yes

Q9 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how satisfied are you with the workplace culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment)?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q10 Do you feel valued in your role?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q11 Which of these issues contribute to your feeling undervalued?

Compensation (1)

Work hours (2)

Transparency (3)

Other – please insert (4) _____

Display This Question:

If Do you feel valued in your role? = No

Q12 Do you feel adequately compensated for the work that you do?

No (1)

Yes (2)

Display This Question:

If Do you feel adequately compensated for the work that you do? = Yes

Q39 Which of these contribute to what you consider adequate compensation?

Health benefits (1)

Monetary compensation (2)

Bonus options (3)

Retirement match (4)

Other - please insert (5) _____

Display This Question:

If Do you feel valued in your role? = No

Q17 What would make you feel more valued?

Display This Question:

If Do you feel valued in your role? = No

Q13 Do you have flexible work hours?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q14 Is your organization transparent (e.g., open and honest with employees about organizational matters)?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q15 Are you aware of upcoming foundation projects (e.g., fundraising campaigns, etc.)?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q16 How long does your supervisor typically take to get back to you when you ask for input?

- 1-4 hours (1)
- 5-8 hrs (2)
- Longer than 8 hours (3)
- Longer than 24 hours (4)

End of Block: Block 2

Start of Block: Block 2

Q18 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how well do you understand your job expectations?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q19 On a scale of 1 to 6 where 1 = not at all and 6 = quite a lot, how much pride do you have in the work you do?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q20 On a scale of 1 to 6 where 1 = very unsatisfied and 6 = very satisfied, how satisfied are you with your role as a MGO?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q21 Are there incentives for meeting your performance expectations?

Yes (1)

No (2)

Display This Question:

If Are there incentives for meeting your performance expectations? = Yes

Q22 What sort of incentives are offered?

- Monetary bonuses (1)
- Extra time off (2)
- Commission (3)
- Other (4) _____

Display This Question:

If Are there incentives for meeting your performance expectations? = No

Q23 Would incentives such as extra time off or monetary bonuses incentivize you to work harder?

- No (1)
- Yes (2)

Q24 Is there anything other than time off or monetary bonuses that motivates you to reach your job expectations?

Q25 On a scale of 1 to 6 where 1 = not at all realistic and 6 = very realistic, how realistic do you believe your performance expectations are?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q26 Is there a clear path to climbing the organizational ladder in your foundation?

No (1)

Yes (2)

Q27 Do you feel that you have adequate resources to be successful in your job?

No (1)

Yes (2)

Display This Question:

If Do you feel that you have adequate resources to be successful in your job? = No

Q28 Which of the following resources do you need?

- Current/up-to-date software (1)
- Current/up-to-date hardware (2)
- More accurate information (i.e. correct prospect details/contact information) (3)
- More reliable internet connection in the workplace (4)
- Better initial job training/onboarding process (5)
- Ongoing professional development (6)
- Opportunity to be mentored (7)
- Privacy within the workspace (8)
- Storage facilities within the workspace (9)
- Supplies (10)
- Comfortable furniture (11)
- Other –please insert your answer (12)

End of Block: Block 2

Start of Block: Block 4

Q32 Please add any comments/concerns you have as an MGO in a nonprofit university foundation to better the industry.

Page

Break

Q33 Please select your age:

- 35years or less (1)
 - 36-45 years (2)
 - 46-55 years (3)
 - 56 years or older (4)
 - Prefer not to say (5)
-

Q34 Please select your gender:

- Male (1)
 - Female (2)
 - Non-binary / third gender (3)
 - Prefer not to say (4)
-

Q38 Please select your ethnicity:

- Hispanic or Latino or Spanish Origin (1)
 - Not Hispanic or Latino or Spanish Origin (2)
 - Prefer not to identify (3)
-

Q35 Please select your race:

- White or Caucasian (1)
 - Black or African American (2)
 - American Indian or Alaska Native (3)
 - Asian (4)
 - Native Hawaiian or Pacific Islander (5)
 - Prefer not to Identify (6)
-

Q36 What is your gross income as an MGO?

- \$30K or less (1)
 - \$30k-\$44,999 (2)
 - \$45k-\$59,999 (3)
 - \$60k or more (4)
 - Prefer not to say (5)
-

Q37 What level of education have you completed?

- High school graduate (1)
- Some college (2)
- Bachelor's degree (3)
- Master's degree (4)
- Doctoral degree (5)

End of Block: Block 4

I do not consent to this survey (2)

*Skip To: End of Survey If You are invited to participate in a research project entitled
“Retention Issues in Nonprofit Univ... = I do not consent to this survey*

Q1 Prior to your current position at the nonprofit university foundation, did you have previous experience in a nonprofit organization?

Yes (1)

No (2)

Display This Question:

If Prior to your current position at the nonprofit university foundation, did you have previous expe... = Yes

Q2 How many years of prior nonprofit experience did you have?

<2 (1)

2-5 (2)

6-10 (3)

>10 (4)

Display This Question:

If Prior to your current position at the nonprofit university foundation, did you have previous expe... = Yes

Q3 What was your reason for leaving your previous position?

Unsatisfactory compensation (1)

Feeling undervalued (2)

Lack of training (3)

Other (4) _____

Page

Break

Q4 How many years do you intend to work at your current university nonprofit?

- <2 (1)
- 2-5 (2)
- 6-10 (3)
- >10 (4)

Q5 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how satisfied are you with your current work environment?

- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)
- 5 (5)
- 6 (6)

End of Block: Consent

Start of Block: Block 2

Q7 Do you believe you received adequate training before starting your current position as an MGO?

No (1)

Yes (2)

Q8 Does the work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment) affect your daily professional activities?

Yes (1)

No (2)

Display This Question:

If Does the work culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workpl... = Yes

Q9 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how satisfied are you with the workplace culture (e.g., attitudes, behaviors, and beliefs that make up the consistent workplace environment)?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q10 Do you feel valued in your role?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q11 Which of these issues contribute to your feeling undervalued?

Compensation (1)

Work hours (2)

Transparency (3)

Other – please insert (4) _____

Display This Question:

If Do you feel valued in your role? = No

Q12 Do you feel adequately compensated for the work that you do?

No (1)

Yes (2)

Display This Question:

If Do you feel adequately compensated for the work that you do? = Yes

Q39 Which of these contribute to what you consider adequate compensation?

Health benefits (1)

Monetary compensation (2)

Bonus options (3)

Retirement match (4)

Other - please insert (5) _____

Display This Question:

If Do you feel valued in your role? = No

Q17 What would make you feel more valued?

Display This Question:

If Do you feel valued in your role? = No

Q13 Do you have flexible work hours?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q14 Is your organization transparent (e.g., open and honest with employees about organizational matters)?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q15 Are you aware of upcoming foundation projects (e.g., fundraising campaigns, etc.)?

No (1)

Yes (2)

Display This Question:

If Do you feel valued in your role? = No

Q16 How long does your supervisor typically take to get back to you when you ask for input?

- 1-4 hours (1)
- 5-8 hrs (2)
- Longer than 8 hours (3)
- Longer than 24 hours (4)

End of Block: Block 2

Start of Block: Block 2

Q18 On a scale of 1 to 6 where 1 = not at all and 6 = completely, how well do you understand your job expectations?

- 1 (1)
- 2 (2)
- 3 (3)
- 4 (4)

5 (5)

6 (6)

Q19 On a scale of 1 to 6 where 1 = not at all and 6 = quite a lot, how much pride do you have in the work you do?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q20 On a scale of 1 to 6 where 1 = very unsatisfied and 6 = very satisfied, how satisfied are you with your role as a MGO?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q21 Are there incentives for meeting your performance expectations?

Yes (1)

No (2)

Display This Question:

If Are there incentives for meeting your performance expectations? = Yes

Q22 What sort of incentives are offered?

Monetary bonuses (1)

Extra time off (2)

Commission (3)

Other (4) _____

Display This Question:

If Are there incentives for meeting your performance expectations? = No

Q23 Would incentives such as extra time off or monetary bonuses incentivize you to work harder?

No (1)

Yes (2)

Q24 Is there anything other than time off or monetary bonuses that motivates you to reach your job expectations?

Q25 On a scale of 1 to 6 where 1 = not at all realistic and 6 = very realistic, how realistic do you believe your performance expectations are?

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

Q26 Is there a clear path to climbing the organizational ladder in your foundation?

No (1)

Yes (2)

Q27 Do you feel that you have adequate resources to be successful in your job?

No (1)

Yes (2)

Display This Question:

If Do you feel that you have adequate resources to be successful in your job? = No

Q28 Which of the following resources do you need?

Current/up-to-date software (1)

Current/up-to-date hardware (2)

More accurate information (i.e. correct prospect details/contact information) (3)

More reliable internet connection in the workplace (4)

Better initial job training/onboarding process (5)

Ongoing professional development (6)

Opportunity to be mentored (7)

Privacy within the workspace (8)

Storage facilities within the workspace (9)

Supplies (10)

Comfortable furniture (11)

Other –please insert your answer (12)

End of Block: Block 2

Start of Block: Block 4

Q32 Please add any comments/concerns you have as an MGO in a nonprofit university foundation to better the industry.

Page

Break

Q33 Please select your age:

- 35years or less (1)
- 36-45 years (2)
- 46-55 years (3)
- 56 years or older (4)
- Prefer not to say (5)

Q34 Please select your gender:

- Male (1)
- Female (2)
- Non-binary / third gender (3)
- Prefer not to say (4)

Q38 Please select your ethnicity:

- Hispanic or Latino or Spanish Origin (1)
- Not Hispanic or Latino or Spanish Origin (2)
- Prefer not to identify (3)

Q35 Please select your race:

- White or Caucasian (1)
- Black or African American (2)
- American Indian or Alaska Native (3)
- Asian (4)
- Native Hawaiian or Pacific Islander (5)
- Prefer not to Identify (6)

Q36 What is your gross income as an MGO?

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- \$45k-\$59,999 (3)
- \$60k or more (4)
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End of Block: Block 4