



At the Fundraising Core

*Strategic Public Relations
in Fundraising Practice*

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ABOUT THE STUDY

This white paper reports on a study exploring the views of chief fundraising executives at private colleges and universities about the relationship between public relations and fundraising. The research focused on how fundraising executives define public relations and use public relations tactics and strategies within their institutions' fundraising operations. In addition, fundraising executives were asked about what essential skills and training or academic degrees a fundraiser would need to be successful.

The study was designed to explore how strategic public relations is at the core of successful fundraising operations and whether future fundraisers should consider selecting an academic path in public relations to prepare for the profession. The research also focused on the fundraising profession overall and whether having an indentified academic base deeply linked in related theories and methodologies would aid the profession in terms of its reputation and credibility.

ACADEMIC PREPARATION FOR FUNDRAISERS: PRACTICE AND THEORY

Unlike many professional career tracks, fundraising lacks confirmed academic roots. Fundraising professionals come to their careers with diverse backgrounds and educational degrees. Until the last decade or so, fundraisers (also referred to as development officers) entered the profession practically by accident. They did not plan to become fundraisers while in college or at the onset of their careers; instead, they landed in the field because of certain traits they possessed.

Kathleen Kelly, a professor in the department of public relations at the University of Florida College of Journalism and Communications, sums it up well: "Fundraising requires no formal training for entry. It pays well, and the demand for fund raisers—even in recessionary times—outweighs the supply. Reflecting this open career path, practitioners come from various backgrounds and traditionally have been trained by the apprentice system" (Kelly 1998, 80).

Others have suggested that fundraisers would benefit from academic programs developed for other professional careers, such as business or marketing, and some professionals have pursued the more recently developed advanced degree programs in philanthropy and fundraising that exist at places such as the Center on Philanthropy at Indiana University or the George H. Heyman Jr. Center for Philanthropy and Fundraising at New York University.

Although specialized study in philanthropy and fundraising is now available, the majority of senior fundraisers in the field do not possess degrees from such programs. Instead, they build their development skills by attending conferences, seeking certification opportunities, enrolling in continuing education online courses and learning on the job.

One potential but overlooked pathway to the fundraising profession is strategic public relations. Scholars have been exploring the common vein between fundraising and public relations for some time.

“If public relations is the function responsible for managing relationships between an organization and its stakeholders, then fundraising is a specialization of public relations because fundraisers identify and maintain relationships with donors on behalf of charitable organizations,” Kelly said. “At all levels—tactical, strategical and theoretical—they are the same” (quoted in Elasser 1998, para. 2).

M. R. Hall, in “Fundraising and Public Relations: A Comparison of Programme Concepts and Characteristics,” wrote that “the value of understanding fundraising as a sub-specialty of public relations is that this provides fundraising with a conceptual and theoretical home in the behavioral and social sciences. It enables fundraisers and scholars concerned with fundraising issues to turn to studies of public relations practice for guidance on fundraising practice” (Hall 2002, 368).

These concepts are also linked to academic theory.

“Public relations excellence is rooted in stakeholder theory, the belief that an organization’s success is dependent on the skill with which it manages the often conflicting demands of its numerous stakeholders—how well it manages its relationships,” wrote W. T. Coombs in *Handbook of Public Relations* (111).

The stakeholder theory of public relations is intertwined with the ROPES model, which is highlighted by Kathleen Kelly as an originally conceptualized normative theory of fundraising and includes **R**esearch, **O**bjectives, **P**rogramming, **E**valuation and **S**tewardship.

“ROPEs provides a comprehensive theory of relationship management; that is, it explains how relations with all publics—whether donors, investors, community residents, government officials, members of the media, consumers, or others—are and should be managed,” according to Kelly (2001, 280–83).

Despite the scholarly view that the foundations of public relations are also inherent in fundraising, the perspectives of fundraising leaders on the subject have not been fully explored because of limited research on their views and few applications of academic theory to the specific practice and profession.

DEFINITIONS AND DISCUSSION

The Official Statement on Public Relations adopted by the Public Relations Society of America (1982) states: “Public Relations helps our complex, pluralistic society to reach decisions and function more effectively by contributing to mutual understanding among groups and institutions.” In addition, Lattimore, Baskin, Heiman and Toth (2007) offer the following working definition of public relations:

Public Relations is a leadership and management function that helps achieve organizational objectives, define philosophy, and facilitate organizational change. Public relations

practitioners communicate with all relevant internal and external publics to develop positive relationships and to create consistency between organizational goals and societal expectations. Public relations practitioners develop, execute, and evaluate organizational programs that promote the exchange of influence and understanding among an organization's constituent parts and publics. (4)

For the purpose of this study, *fundraising* is defined as “the purposive process of soliciting and accepting monetary gifts from individuals, corporations and foundations by a charitable organization, especially as managed for the organization by fundraising specialists” (Kelly 1991, 79–80).

A review of literature found a number of correlations between strategic public relations and fundraising practice. For example:

- Both public relations and fundraising require two-way communications that include creating messages shaped for the purpose of persuasion, listening to responses and adapting messages as appropriate (Kelly 1991)
- Both involve “relationship management” designed to “produce more satisfied publics” (Waters 2008, 84)
- Both require strong verbal, written and interpersonal skills (AFP 2010)
- Both require a strategic understanding of institutional and constituent goals (AFP 2010)
- Both involve the ability to track budgets and develop marketing and communications plans (AFP 2010)
- Both require the ability of practitioners to scan their environments (AFP 2010)
- Both require an understanding of the legal and ethical framework of the practices (AFP 2010)
- Both require selected traits, such as being persuasive, passionate about the cause, patient, a good listener, resilient and energetic (AFP 2010)

METHODOLOGY

The study upon which this white paper is based was conducted as a capstone project by a graduate student enrolled in the S.I. Newhouse School of Public Communications at Syracuse University for a master of science degree in communications management. (The author is also the chief fundraiser for an educational institution, although this study was undertaken as part of her graduate work.)

The researcher focused on three main questions:

- Is strategic public relations used in the fundraising operation?
- What skills and academic studies would be important for a fundraiser to pursue in order to be successful?
- Is it important for fundraisers to be able to identify a common academic degree/training?

Following an extensive literature review, the researcher conducted face-to-face interviews with 10 chief fundraisers at institutions of higher education in the upstate New York region. The chief fundraisers were vice presidents for institutional advancement, directors of development or professionals in similar roles. The researcher also examined the backgrounds of chief fundraisers as well as institutional organizational charts and other documents.

FINDINGS

Strategic Public Relations and Fundraising

The first set of core questions asked during the interviews sought to determine whether strategic public relations skills are used in fundraising operations. Questions included:

1. How do you define *public relations*?
2. What connections do you see between public relations and fundraising?
3. Which public relations tactics and strategies are used in your fundraising operation?
4. How do public relations tactics and strategies in your fundraising operation contribute to your institution's overall goals and objectives?

These questions were intended to help identify public relations tactics and strategies used in fundraising practice and how fundraising leaders define *public relations*. In addition, they shed light on the value of public relations within fundraising to the overall organization, its goals and its objectives.

Two key themes emerged from the interviews:

- Public relations and fundraising are intertwined and inextricably related.
- Public relations tactics used within fundraising directly support and help meet an organization's overall goals and objectives.

Interviewees offered a number of credible definitions for *public relations*, including:

- "A series of strategies and tactics you undertake to hopefully shape opinion about your institution and to disseminate information that you think is critical to advance your goal."
- "The management of the positioning of the organization in relation to its various markets in order to optimize the organization's relationships with those key markets."
- "The interaction of the institution with a defined public."
- "The act of forming public opinion regarding your company or institution."
- "The art of connecting your core mission—what you do—to your main constituencies and then building informational bridges better targeted to your alumni, faculty and prospective students."

Interviewees also recognized that public relations tactics used within fundraising directly support and help meet the organization's overall goals and objectives. There was general consensus that

public relations helps in shaping opinion, disseminating information strategically, using position messaging, highlighting mission and generally paving the way for fundraising efforts. Interviewees acknowledged as well that fundraising activity directly affects public relations work. Related responses include:

- “PR can feed into fundraising. If you get some positive PR, that creates a pride factor that helps smooth the way [for fundraising].”
- “PR can pave the way, to underscore what we are trying to accomplish, and serve as a way to identify our challenges. It’s integral to our area and world of fundraising.”
- “Anyone who is trying to raise money without also trying to do sophisticated public relations and marketing efforts is going to have a hard time.”
- “Every decision we make in development has public relations ramifications and everything we do in public relations has ramifications on our fundraising, so we need to be marching in step.”
- “The two [PR and fundraising] are interchanged, intertwined—because the messages have got to be the same.”

When asked about specific public relations tactics used in fundraising, respondents mentioned marketing, print materials, newsletters, magazines, “good news” letters, fundraising appeals, events, community relations, class notes, videos, media/press, campaign materials, Web, social media (Facebook, Twitter, LinkedIn, YouTube), e-mail, partnerships with external entities, personal visits, articles and strategically based outreach activities.

Interviewees overwhelmingly agreed that public relations tactics and strategies within fundraising operations contribute to reaching and achieving the organization’s overall goals and objectives.

Skills and Academic Training for Fundraisers

The second set of core questions asked of interviewees concerned skills and academic studies that, if pursued, would help a fundraiser be successful. These questions included:

1. How would you describe the ideal skill set for fundraisers? How do these skills enhance their work?
2. Can you identify any similar skills between fundraising and public relations professionals?
3. What type of academic degree best serves a fundraising professional and why?
4. What other type of training or studies are essential for a fundraiser?
5. What type of advanced degrees do you and your professional fundraisers currently possess?
6. Do you think an academic degree in public relations would be beneficial for a fundraiser? Why or why not?

These questions were developed to identify what fundraising managers believe are the skills, training and education a professional fundraiser should possess and whether they are similar to those pursued by public relations practitioners. The questions were also designed to uncover if leaders believe fundraisers' experience could be enhanced with the possession of a public relations academic degree or further public relations training in general.

The emerging theme of answers to these questions is that skills, attributes and personality outweigh the importance of academic credentials. Respondents suggested that successful fundraisers should have the following characteristics:

- Be good at listening, writing, speaking, follow-up, research and analysis
- Like people, be curious about people, be able to read people, be able to make people feel relaxed and connected, be able to work with people who are accomplished, be good at building relationships
- Be goal-setters, have discipline, have integrity, be intellectually curious and have a good work ethic
- Be accountable, articulate, strategic, competitive, entrepreneurial, creative, energetic, passionate, upbeat and a bit-self centered
- Know their institutions, be able to prioritize, be able to teach and put themselves in someone else's shoes, know how to ask for and steward gifts and to say "thank you"

Virtually every respondent stressed the importance of being a good listener, communicator and writer and knowing how to build relationships.

Many noted that the overlap between the fundraising skills they described with those of a public relations practitioner was significant, with one noting that the skills are "completely transferrable." Other comments included:

- "For both professionals, you need to understand the institution, its objectives and goals, what it's doing, where it's been. You need to communicate that clearly. You need to make sure the brand of the institution is understood. You need to build relationships."
- "I think they [PR and fundraising] are almost the same, but a good PR professional has an almost instinctual knowledge of how information and ideas flow through the world."

There was no common response to the question "What type of academic degree best serves a fundraiser?" Many interviewees felt the type of degree a fundraiser has simply did not matter to his or her success. The majority interviewed said they believed that an undergraduate degree in the liberal arts is of most value. Comments included:

- "The virtue of the liberal arts degree is that it is broad. It taught me to think. It taught me to appreciate flexibility, be able to think broadly, reflect historically, adapt quickly and appreciate nuance. These are all things that fundraisers or PR people can use."

- “I found the ability to talk with people who have been successful, the ones we are trying to get to in terms of gifts—they are bright. They are well versed in finance, literature, politics, theater, arts—and so the ability to be conversant in those areas, even when you are not terribly knowledgeable, is so important.”
- “This notion about intellectually curious people who are broadly educated and who can talk about arts, music, literature, and who are reading books, who have seen plays and have read the *New Yorker*. This is what you need. They can come from a wide range of fields.”
- “You have to be able to talk with a prospect and they are educated people. You need to read the *Wall Street Journal*. You need to know your current events. I think these are things you learn in a liberal arts education.”

Those who did specify a degree—often in addition to a liberal arts education—suggested business/finance, public relations/communications, English, government relations, science/technology and journalism.

Respondents also indicated that in addition to having the skills mentioned above, fundraisers should understand basic fundraising principles and techniques, some level of elementary budgeting or finance, grant writing, the tax code and networking. Some considered the certified fundraising executive (CFRE) training to be important, while others did not believe CFRE certification provided enough of an evaluation of individual skills. Most felt that CASE resources and conferences and those of the Association of Fundraising Professionals (AFP) are also beneficial.

The wide-ranging undergraduate degrees held by fundraising staff at the survey respondents’ institutions—in education, music, public policy, art/Russian literature, communication and public administration and other fields—support the notion that no clear academic path to fundraising currently exists. Those relatively few fundraisers who held advanced degrees had earned them in business administration, law, fine arts, higher education administration, organizational communication and history, among others.

Would an academic degree in public relations be beneficial for a fundraiser? Responses to this question varied. Some thought it would be helpful, while others did not think it would matter at all. Those in favor of a public relations degree offered these comments:

- “I think it would be helpful because you are talking about the broad issue of how you make the case. You understand the body of knowledge that is out there.”
- “I think you would have a real foundation in good, solid, strong communications techniques—the theory behind it, understanding how messaging works. Definitely could be an asset.”
- “Anything that focuses you externally, I think is valid. You are trained to think and

analyze about how others are thinking and to change those perceptions. That is basically what you are doing in development.”

However, even though there was a perceived value of a public relations degree among these respondents, all confirmed that they would not base hiring decisions on that credential alone but would instead take that degree into consideration, along with experience and other attributes and traits that serve a fundraiser well.

Comments from those who did not necessarily believe that a public relations degree would be of value included:

- “Fundraisers need to rely on their PR colleagues.”
- “I never met anybody [in fundraising] who continues to talk about that [a degree] being so important to them in their work. Skills, attributes and personality are more important.”

The Importance of a Common Academic Degree

The final set of core questions focused on whether respondents believe it is important for fundraisers to be able to identify a common academic degree or training. Key questions:

1. When searching for professional fundraiser candidates for an open position, would it be beneficial to identify a certain type of academic degree that is known to provide educational theories and methods that relate to the fundraising profession? Why or why not?
2. Does having an academic “home” for fundraising aid the professional and the profession? Why or why not?

These questions determine if fundraising leaders believe that identifying an academic degree area (home) for fundraisers is important to them as managers and/or to the fundraising profession overall.

The primary theme emerging from answers to these questions is that it would be nice to have a common academic degree identified for the fundraising profession but that it really is not necessary.

Responding to the question emphasizing theories and methods as part of academic training for fundraisers, one individual respondent said theories and methods would be valuable “if they know how to use them.” Others agreed, saying they would not hire someone on the degree credential alone. Comments included:

- “It would certainly be beneficial to have that sort of background because I think the person who has been exposed to that kind of theory might connect the dots quickly between what we do and how we do it. But it’s not just the degree. I would want to engage that person and see if they can connect the dots.”
- “If I have that kind of pool, and all things being equal, and every single person is qualified in the same way, than yes, this may help me to decide. I wish it was that simple.”

In addition to considering the degree and experience, one respondent said he also looks at professional certificates and institutes attended, noting that different fundraising positions require different skills and training. For example, a legal background is appropriate for a planned giving officer.

The second question asked if having an academic degree “home” for fundraising would aid the professional and profession overall. Comments varied, but most respondents felt that while it would be nice to have an academic home for the fundraising profession, it is not necessary.

CONCLUSION

This study upon which this white paper is based focused on highlighting a natural connection between the strategies and tactics of public relations work and the core elements of fundraising. The researcher intended to show that when listing valuable training required for fundraising professionals, a manager should consider including experience or training in or understanding of strategic public relations.

The results of this study supported *part* of the researcher’s main theory. Most of the fundraising managers interviewed confirmed the overlap of public relations theories, tactics, strategies and methodologies with fundraising and felt it would be helpful to have some knowledge of public relations to assist with fundraising. Many agreed that the required skills and abilities of public relations professionals are similar to those of fundraisers, and they thought it might be helpful to have some academic training in public relations.

Despite these perspectives, most also concluded that no one degree can currently be considered a “home” for fundraisers. Beyond that, respondents said that skills, attributes and personality—combined with on-the-job experience—outweighed the importance of a specific academic degree for the fundraising professional. Even the few who thought it might help the profession to have such an academic degree “home” still underscored that it should not be a prerequisite or essential.

Responses touched on all key phrases used in public relations and fundraising, such as achieving organizational objectives; facilitating organizational change; communicating with all relevant internal and external publics; developing positive relationships; creating consistency between organizational goals and societal expectations; and developing, executing and evaluating organizational programs that promote exchange of influence and understanding between and among an organization’s constituencies.

In addition, responses confirmed that public relations and fundraising are inextricably linked and that there are many public relations tactics and methods used in fundraising to ensure success. The way that nearly all interviewees described the development of their organization’s goals and objectives indicated that public relations and fundraising both play a critical role in helping achieve overall organizational success. Each relies on the other, to a certain extent, to ensure success. In

addition, many of the organizations' structures combine public relations/communications with development in one division or department.

A study of the literature, much of which is not reiterated in this white paper, further confirmed that theories studied in academic public relations programs relate to the core of the fundraising practice. These include James E. Grunig's theory of public relations models (Kelly 1991), Blau's theory of social exchange (Kelly 1991), the relationship management theory (Waters 2008), coorientation methodology (Waters 2008), the ROPES (research-objectives-programming-evaluation-stewardship) model (Kelly 2001) and stakeholder theory (Coombs 2001).

Important traits for fundraisers that align with valued traits for public relations practitioners include the need to be good communicators, listeners and writers; having a clear sense of the organization's mission; the ability to devise strategic plans; marketing; developing relationships; being aware of their environment; and creating stewardship opportunities. Respondents placed the greatest emphasis on the ability to write.

As in public relations, fundraisers need to be accountable and be held accountable. They need to be analytical, knowledgeable about the business world, able to create and track budgets and set achievable goals.

While the concept of certification did not receive a lot of support in this study, respondents widely supported the pursuit of training through CASE, AFP and other organizations that provide support related to the technical aspects of the fundraising practice and insight into the basic fundraising principles. One respondent placed less emphasis on this form of training and felt that shadowing an experienced fundraiser and reading about real-life business examples of successful companies, people and leaders would have greater value—especially for those who lead a team.

In this study, the greatest divide between public relations and fundraising emerged from the discussion about a required academic degree. Respondents did not comment on the importance of an academic degree in public relations for public relations practitioners as that was not part of the questionnaire, but they did comment about whether an advanced degree for fundraisers might be important.

There was no identifiable front-runner degree mentioned as being the best path for a future fundraiser to follow. The study showed that respondents thought a liberal arts undergraduate degree would be extremely beneficial and that an advanced degree is of lesser importance. Although no specific degree was confirmed, clearly certain skill sets and experience were perceived as critical.

In sum, it appears that the question provided by the researcher for this study—whether it would be beneficial for a fundraiser to have a public relations academic degree and whether it would aid the profession overall to identify an academic path for the future fundraisers—lacks

consensus in the collective response from fundraisers. It seems such a degree would be viewed more as an asset or bonus than as a necessity.

The study results do not counter the original belief of the researcher that there is a natural connection between the strategies and tactics of public relations work and the core elements of fundraising. That connection seems to have been supported. However, the study results do counter the researcher's belief that managers should consider experience, understanding and/or academic training in strategic public relations when looking for fundraising employees. This simply was not supported by the majority of respondents.

In what way can the views gathered during this study be helpful to fundraising professionals and the profession? These views might indicate that future fundraisers should plan to seek a liberal arts education, study the principles and techniques of the fundraising profession and set out to gain experience in the workplace. However, none of this will matter as much as having the right innate skills, abilities and personality to be able to build relationships that ultimately reap benefits for an organization.

Some interviewees commented that the academic programs developed by institutions such as Indiana University, New York University and Columbia University are a step in this direction. Over time, the researcher would like see further incorporation of public relations, communications and business courses within these curricula.

Despite the overall findings, the researcher still holds to the view that was mentioned by one fundraiser when comparing fundraising to public relations: "When I was an undergraduate, you couldn't take PR, and now, there are master's degrees in PR and it is a well-established academic field. The same thing is true for Development now. It is time now for institutions to look at this—the not-for-profit enterprises of the nation are dependent on the success of the development efforts. To really understand that it is a field that can be studied and can be taught is important to do."

Fundraisers would benefit from a greater understanding of public relations principles, including the strategic foundation of public relations, given the tendency of those interviewed to view public relations as a tactical rather than strategic function. Some comments received were more about the relationship of fundraising and public relations as separate entities and not about the integration of strategy and skills; study participants considered the output of public relations as it relates to fundraising and not public relations strategy as it would inform fundraising strategy.

LIMITATIONS AND FUTURE RESEARCH

The study was limited by including interviews with only the top-level fundraising professionals at each institution. Each of these individuals has been in the fundraising field for some time, and

many commented that when they were in college that they did not have the option of pursuing a fundraising track/degree, unlike students today.

Additionally, this study focused only on private colleges and universities. Public institutions, which tend to have younger fundraising programs, were not included.

Although the questions used covered a wide variety of interactions between fundraising and public relations, the researcher did not ask “Is fundraising a specialization of public relations?” This may provide a more direct and focused reaction to whether or not fundraising is embedded in public relations practice.

Since several of the advanced fundraising degrees offered by institutions have been available for a while, it would be interesting to interview graduates of those programs and/or their employers or managers to assess the perceived impact of such degrees. Research could also include an in-depth review of the curricula to determine if public relations is emerging as a thread for study in these degree programs and if any programmatic adjustments have been made over time since these programs were first created. For example, in addition to the study of philanthropy and fundraising techniques and principles, are business, public relations and/or communications courses incorporated?

Public institutions and community not-for-profits could also be considered for future studies to broaden the perspective on this topic. A comparison of younger operations and well-established fundraising programs may also offer additional considerations.

A clear separation of fundraising positions should be emphasized in future studies. The role of the planned giving officer is different from that of the annual fund director. Qualifications vary for various fundraising roles.

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APPENDIX A. Interview Questionnaire—Chief Fundraiser

Questions

1. How do you define public relations?
2. What connections do you see between public relations and fundraising?
3. Which public relations tactics and strategies are used in your fundraising operation?
4. How do public relations tactics and strategies in your fundraising operation contribute to your institution's overall goals and objectives?
5. How would you describe the ideal skill set for a fundraiser? How do these skills enhance their work?
6. Can you identify any similar skills between fundraising and public relations professionals?
7. What type of academic degree best serves a fundraising professional and why?
8. What other type of training or studies are essential for a fundraiser?
9. What type of advanced degrees do you and your professional fundraisers currently possess?
10. Do you think an academic degree in public relations would be beneficial for a fundraiser? Why or why not?
11. When searching for professional fundraiser candidates for an open position, would it be beneficial to identify a certain type of academic degree that is known to provide educational theories and methods that relate to the fundraising profession? Why or why not?
12. Does having an academic degree "home" for fundraising aid the professional and the profession? Why or why not?

ABOUT S.I. NEWHOUSE SCHOOL OF PUBLIC COMMUNICATIONS

Widely regarded as one of the nation's top schools of communication, the Newhouse School at Syracuse University in Syracuse, New York, is engaged in industry partnerships and ongoing curricular development that prepare students and faculty alike to take leadership roles in addressing the issues of today's rapidly changing media landscape.

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Students are among the best in the country, having secured a place in the class through a highly competitive admissions process. Upon graduation they become part of a large, loyal and highly accomplished group of alumni—individuals who are literally shaping the future of public communication across the globe.

The author thanks for S.I. Newhouse School for Public Communications at Syracuse University for granting permission to use this information about the school, which is taken from http://newhouse.syr.edu/Prospective_Students/index.cfm.

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ABOUT CASE

The Council for Advancement and Support of Education (CASE) is the professional organization for advancement professionals at all levels who work in alumni relations, communications and marketing, development and advancement services.

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