

Understanding Higher Education Fundraisers in the United States

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Abstract

Since their earliest days, U.S. higher education institutions have relied on philanthropic support to achieve their missions. What began as incidental is now a highly-organized process of fundraising that accounts for tens of billions of dollars annually. As institutions' desire for private support grows, so too does the demand for successful fundraising professionals. Drawing on qualitative and quantitative analysis, this survey-based study (n=508) of United States higher education fundraising personnel puts fundraisers "into the equation" and grounds their position in historical and contemporary literature about fundraisers and professionalism. The findings highlight notable generational, income, and gender differences within the higher education sector and between higher education and the greater profession. The analysis shows an established knowledge-base and set of learnable skills for higher education fundraisers—which is best applied when combined with particular personal attributes. Although the latter are critically important, without full and fair attention to the former, the occupation is unlikely to garner full respect as a profession. In a field that is not yet fully professionalized, the path forward highlights the complexity of contemporary fundraising, establishes that fundraising is relationship- and information-driven, and indicates that select, strategic efforts can further professionalize the field. In particular, fundraisers in the education sector may have special opportunities to advance the professionalization of their occupation.

Keywords: fundraisers, higher education, advancement, fundraising, development

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Introduction

In 2016, philanthropic gifts to higher education in the United States equaled \$41 billion, a small increase of 1.7% from the prior year (Council for Aid to Education [CAE], 2017). Two gifts of \$100 million or more are included in this total, and gifts to 20 institutions (less than 1% of colleges and universities) constituted 27.1% of the total. At Stanford University, the leading recipient of philanthropic dollars in 2015, the university's leadership credited its success in part to "a world-class fundraising team" (O'Neil, 2016).

Fundraisers help donors support postsecondary institutions' teaching, research, and service missions. Talented and skilled fundraisers are in perpetual demand (Duronio & Temple, 1997; Flandez, 2012). Retention is an ongoing challenge in an environment where need outpaces supply (Iarrobino, 2006; Joslyn, Frazier, Gienow, & Hall, 2014; Lindsay, 2015)—exacerbated by the reality that the profession lacks diversity; hiring "just the right people" now includes increasing attention to diversity, equality, equity, and retention (Nagaraj, 2015).

Dollars given and pledged are visible and quantifiable outcomes of fundraisers' work. Who should be included as fundraisers, how many there are, and how they achieve success remain a mostly unexplored mystery for the profession and those who depend on it. This reflects a scholarly and practical context in which attention most often focuses on donor behaviors and motivations (Breeze, 2017; Proper & Caboni, 2014).

Fundraisers have sought to enhance the structures and support systems of their practice and to build respect and recognition for the contribution of fundraising to philanthropy and society. Their efforts have included professionalization through the creation of membership associations, specialized training and education, the Certified Fund Raising Executive credential or equivalent in countries outside the U.S., establishment of ethical standards, and the development of particular rhetoric around giving, which emphasizes a values-based perspective on fundraising (Aldrich, 2016). Yet, there is no consensus on whether or not fundraising is indeed a mature profession (Bloland, 2002) or one that is still emerging (Tempel & Beem, 2002; Aldrich, 2016).

With this study, we sought to understand the profession of higher education fundraising in the United States by taking note of fundraisers' views and attitudes regarding their own work. We ground their position in historical and contemporary literature about fundraisers and theories of professionalism. The research is based on survey data collected in 2015 from 508 fundraisers from across the U.S. The findings highlight notable generational, income, and gender differences within higher education and between higher education fundraisers and a broader sample of fundraisers. The analysis shows an established (and sometimes overlapping) knowledge-base and set of learnable skills for higher education fundraisers, which is best applied when combined with particular personal attributes. Although the latter are critically important, without full attention to the former, the occupation is unlikely to

achieve fair recognition and garner respect as a profession.

A series of suggestions for improvements indicates that the field is not yet fully professionalized, while also providing a path forward guided by fundraisers' own self-assessments as noted in this and related studies. The results highlight the complexity of contemporary fundraising, lend credence to the notion that fundraising is relationship- and information-driven, and indicate select strategic efforts required to make the occupation—and perceptions of it—better. The study offers insights for scholars, institutional leaders, and practitioners alike as well for as the academic programs and professional associations that provide advocacy, education, and ethical standards. The findings complement other research, which is discussed in the subsequent sections, with a focus on the U.S. experience, expanding a much-needed information repository in this area.

Literature and theory

Beginning with Harvard's founding, philanthropy has shaped U.S. higher education (Drezner, 2011; Thelin & Trollinger, 2014). Philanthropists created or shored up colleges like Yale and the University of Chicago, launched denominational colleges and women's institutions, and lent critical support for historically black colleges and universities, such as the Tuskegee Institute (Tindall, 2009). In contemporary times, only giving for religious purposes outpaces philanthropy for education (Giving USA, 2017). Post-secondary institutions rely on philanthropy to fill the gap when public funding and tuition fall short. Colleges and universities depend on fundraisers to build relationships with those who will provide the missing support. Fundraising staffs may number in the dozens or hundreds, be organized centrally or distributed within the university, may be coordinated with communications and alumni services, or function separately; they may include a range of functions from soliciting small annual gifts to negotiating multi-million dollar estate gifts (Thelin & Trollinger, 2014).

Compensation for these various fundraising functions varies, but across differentiated duties those working in fundraising have a median salary of \$73,000 according to the Council for the Advancement and Support of Education (CASE Research, 2016). Ethnic and racial diversity among higher education fundraisers is deficient (only 9% of the total 2013 identified fundraisers were minority) but similar to the proportion among all U.S. fundraisers (10.2% in 2015) (Bureau of Labor Statistics, 2016; The Editors, 2014). Female fundraisers in higher education earn \$.78 to each \$1.00 earned by their male counterparts (Hayashida, 2014), paralleling U.S. workplace gender disparities and evidencing a particular shortcoming in a field dominated by women. Although the standardization of fundraising in higher education aligns with U.S. nonprofit sector trends (Mesch & Rooney, 2008), most observers see opportunity for improvement (Aldrich, 2016; Tempel & Beem, 2002).

Professionalism and higher education fundraising

College fundraising began as an ad hoc affair conducted by presidents, associated clergymen, trustees, and later by traveling agents incidental to their duties (Thelin & Trollinger, 2014). It was not counted among the traditional professions of law, medicine, and the clergy. In the 1900s, as society became wealthier and large philanthropic foundations emerged, fundraising campaigns became more organized and fundraising staffs expanded although fundraising as a distinct activity was considered demeaning and undignified work associated with mistrust and high pressure techniques (Thelin & Trollinger, 2014; Worth, 2016). Nevertheless, the field was growing. More colleges and universities hired their own fundraising staff, the work intensified, associations were formed, and ethical standards were discussed (Thelin & Trollinger, 2014). The organization now known as the Association of Fundraising Professionals (AFP) was founded in 1960, and the Council for Advancement and Support of Education, which began as the Association of Alumni Secretaries in 1913, was established in 1974 (Worth, 2016).

"Development," a term first popularized in the 1950s, is now often used as a synonym for fundraising but is also meant to indicate that developing funds is a complex, continuous, long-term endeavor embedded within the organization (Worth, 2016). Another term applied to the discourse was "institutional advancement," which characterizes an even broader umbrella including fundraising, alumni relations, communications, public relations, and occasionally government relations. These changes indicate ways in which the field desired consideration as a profession with a legitimate place in institutional structures. They signal an intentionally revised narrative and different approach than previously.¹

The terms "professional," "professionalization," and "professionalism" are used to differentiate among workers, their work, the work-knowledge of others, and the progression of some occupations to become more like established "professions". Evetts (2003) offers a practical definition of professions as "occupations which are predominantly service sector and knowledge-based and achieved sometimes following years of higher/further education and specified years of vocational training and expertise" (p. 33). The concept, however, is complex and contested (Evetts, 2003; Hwang & Powell, 2009). Characteristics of a profession, and those in them—doctors, lawyers, teachers—traditionally have included independence and self-governance, certification and determination of applicable knowledge (only available through certain channels), a clear standard for ethical and appropriate practice, and a commitment to public service (Sullivan, 2005). The value of affixing strict definitional characteristics like these, however, has also been called into question by modern scholars who prefer to portray a more fluid landscape among occupations and sectors in which the differences are only that of degree (Evetts, 2003).

¹ In this paper, we use the term fundraising rather than development or institutional advancement to align with to the language used within the survey and to reflect the most common usage in the U.S. discourse.

Professionalism, which changes with societal norms, continues to evolve with shifts in information/knowledge access (increasingly due in large measure to technology), the organization of work between the public, private, and nonprofit sectors, and internationalization of the marketplace (Evetts, 2003). Some scholars reaffirm the continuing public service responsibility of professionals (Sullivan, 2005) while Evetts notes three historical phases (Evetts 2003). The first was the development of the profession as an occupational or normative value, in which knowledge and expertise were highly relevant. The second was characterized by critique in which professionalism was considered to be ideologically-based and promoted by the individual professionals themselves for their own gain. The third, and current phase, Evetts writes, positions professionalism as a discourse. In his view, the language of professionalism and its associated characteristics are used to elevate, organize, and reclaim service work.

Fundraisers are not alone in seeking to professionalize or in using a variety of approaches to achieve these ends—not always with great success. In educational training, fundraisers are taught to think of themselves as professionals with standards to uphold and to use a “language” of philanthropy. Leaders in the field facilitate the growth of associations, formal education, certification, and ethical standards. Public stereotypes about fundraising as being akin to sales in its techniques and goals, however, have likely hampered these efforts (Breeze, 2017). Public debate persists regarding whether fundraising is a business enterprise about money or a values-based expression of moral commitment (Worth, 2016). Fundraisers have long sought to rewrite the narrative that portrays them as sales persons. The notion that anyone can be a fundraiser persists (and is likely perpetuated by the rise of crowdfunding and peer-to-peer fundraising). The absence of structures for enforcing ethical standards contributes to the perception of fundraising as sales.

The quest for truth and knowledge is at the center of the academic ethos, and certification of expertise through degrees is highly valued for post-secondary employment (Shils, 1978). It is problematic that fundraising, with a few exceptions, lacks an academic “home.” Most fundraisers receive their preparation from other practitioners as apprentices rather than through formal, degree-based training—a concern when considering the tenets of professionalism (Mack, Kelly, & Wilson, 2016). As more institutions offer academic courses and degrees in nonprofit management (Mirabella, 2007) there is progress, although fundraising is generally not emphasized. The higher education workforce is particularly hierarchical, with those in non-academic ranks lacking the status of academic employees (Daly, 2013) making it difficult for a staff fundraiser in higher education to be perceived as a peer professional regardless of their credentials or experiences.

Studying contemporary fundraisers

Duronio and Tempel (1997) provided a comprehensive examination of the fundraising field based on a mailed survey (n=1,748) and interviews (n=82) with fundraisers from across the

U.S. Gathering information about individual demographics, education and career trajectories, and attitudes and perceptions, they found that the profession was overwhelmingly white (94%) and becoming dominated by women (55%). However, women were underrepresented in leadership positions and at the highest salary ranges. Most fundraisers were in the education subsector (49.7%) followed by the health field (23.9%). The authors believed fundraising--at the time--to be best defined as a field rather than a mature profession (Duronio & Tempel, 1997).

In the subsequent years, interest in fundraising as a profession has grown domestically and internationally (e.g. Scaife, McDonald, and Smyllie, 2011). The most comprehensive recent analysis is a U.K. study by Breeze (2017), which seeks to generate a demographic, organizational, and personality profile of all fundraisers with comparable analysis of those who have garnered gifts of a million pounds or more. The study included a control group of non-fundraisers. The fundraisers were found to be majority female, under age 40, and not ethnically diverse. The respondents were most often fundraising generalists who had come to the profession accidentally and were more educated than the general public but rarely possessed formal fundraising training. A diversity of personal experiences emerged as relevant in comparison to the control group and included: a high level of trust in others, emotional intelligence, positive experiences with and views on gift giving, sociability, and an emphasis on organizational rather than individual success. The fundraisers were found to be more emotionally intelligent, extraverted, and open (Breeze, 2017).

Among the earliest studies of successful higher education fundraisers, Worth and Asp (1994) described four profiles: the salesman, catalyst, manager, and leader. They concluded that the ability to adapt to an institution's internal environment (instead of theoretical knowledge) was the most important characteristic of successful fundraisers. More recently, one international survey of 1,217 major gift officers from 90 U.S., Canadian, and British universities (Nagaraj, 2015) found "model" fundraisers to be "curious chameleons" with four key attributes: (1) behavioral and linguistic flexibility (2) intellectual and social curiosity (3) the ability to distill information (4) the skill to strategically solicit prospective donors. These skills were considered teachable with strategies for discerning the capabilities in hiring protocols.

An interview-based study of 16 Canadian fundraisers who had secured transformational gifts found the participants to be strongly relational. Fundraisers played three roles in the gifting process—networker, knowledge-broker, and negotiator—each requiring a specific set of key activities that not only centered on relationships with the donor but also with those inside the institution (Nyman, Pilbeam, Baines, & Maklan, 2016). The ability to understand the institution and to enact institutional change combined with a strong understanding of the donor's intentions was crucial. Gifts resulted when the skills of each role were integrated and applied through a co-created interchange between the fundraiser, the institution, and the donor.

Another U.K. study based on interviews with 17 university-based fundraisers examined professional identity, finding it to be multi-faceted and cross-boundary, meaning that the respondents navigated and even disrupted institutional boundaries in the gift creation process. They learned to function within the “contested processes of change” understanding that fundraisers sometimes function as gatekeepers between institutions and external constituents (Daly, 2013, p.28).

A study in the U.S. higher education context focused on successful chief advancement officers and used case studies of ten individuals (majority male) to establish a leadership competency model with fourteen elements (Croteau & Smith, 2011). Many of the competencies are germane for frontline fundraising personnel in general, although this and other works note the value of different skills required across fundraising specialization (Breeze, 2017; Nyman, Pilbeam, Baines, & Maklan, 2016), including intellectual curiosity, effective communication, tenacity, tolerance for ambiguity, strong interpersonal relations, and passion for organizational mission. Among Croteau and Smith’s (2011) conclusions are: (1) interpersonal skills are important; (2) critical thinking and analytical adeptness are necessary to move organizations forward; and (3) formal professional development and succession planning are needed to augment learning on the job.

Normative (and ethical) dimensions of fundraising within the academy were examined in a U.S. survey-based study (N=295) (Caboni, 2010). The exploratory study documented perspectives of frontline fundraisers on establishing norms (exploitation of institutional resources, institutional disregard, and misappropriation of gifts) and admonitions (commission-based compensation, dishonest solicitation, donor manipulation, exaggeration of professional experience, institutional mission abandonment, and unreasonable enforcement of pledges). The existence of strong, agreed-upon ethical norms is central for a profession, but so too are established mechanisms for self-regulation when these norms are not met (Sullivan, 2005). While it appears that higher education fundraising evidences the norms, it lacks a cross-institution and association-governed program for addressing the admonitions.

In sum, most studies (as well as other, less-empirically-based recommendations) typically focus on discerning the perfect fundraiser through delineation of personal traits/skills and interpersonal capabilities rather than taking the more comprehensive approach of Breeze (2017) and Duronio and Tempel (1997). Emphasizing the importance of interpersonal aptitude certainly fits with philosophies of fundraising as relational (and about interactivity and long-term outcomes) rather than transactional (and about one-time, one-way modalities) (Schervish, 2000). Breeze’s assessment appears warranted that fundraising literature--and much of the research--is flawed in postulating a standard for a “perfect” fundraiser without providing concomitant information about how traits, skills, and knowledge establish a foundation for improving the field and enhancing fundraiser success.

As fundraisers aspire to become more professional, effective, and respected, as higher

education institutions aspire to continue to raise ever larger sums of money, and as researchers aspire to better understand gifting, the following research questions may help advance the success and position of the special field of fundraisers in higher education:

1. What are the demographics of contemporary U.S. higher education fundraisers?
2. What knowledge, skills, and personal characteristics are required to succeed as a U.S. higher education fundraiser and how do the three domains intersect?
3. How do U.S. higher education fundraisers perceive the occupation and what are their perspectives on improving it?

Methodology

Members of the major fundraising professional associations—AFP, Association of Healthcare Philanthropy (AHP), and CASE²—in addition to alumni of the Lilly Family School of Philanthropy—were invited to complete an internet-based survey in late 2015. The survey was approved by the university's institutional review board and replicated Duronio and Tempel's (1997) landmark study of the fundraising profession. Forty-one questions addressed a wide range of topics including demographics, career history, organizational characteristics, and attitudes about the profession.

In total 35,747 email invitations were delivered and 1,826 people completed the survey, representing a 5% response rate.³ Of these, 163 people were from outside the U.S.; these individuals were excluded from this paper. The professional associations allowed their members to be contacted only once regarding the survey, which is likely a reason for the low response rate. This paper is one element of a larger, multi-pronged analysis and dissemination strategy aimed at making the data available to practitioners, scholars, and the public across a range of platforms and through several lenses. This paper centers on the 508 U.S. respondents (28% of the total) who were employed in higher education.

Descriptive statistical analysis as well as select Logit and OLS regressions were completed for key items of interest. For all regressions, robust standard errors were used. Standard controls for age, gender, race, were applied. For the logit regressions, the tables display the odds ratios. Typically, the covariates were a standard set of a binary on gender, a binary on race, and a binary of age (under/over 50 years old) as well as a 4-category education measurement, a continuous (imputed) income measurement, a 4-category job position measurement, and a 3-category current area of expertise measurement. The tests run were a logit for selection into the higher education subsector (in comparison with the larger survey sample), OLS regressions on income and age when entering the fundraising field (both done

² Only CASE members whose records indicated fundraising responsibilities, current or past, were included in the invitation to participate.

³ Our sample closely resembles overall U.S. membership in AFP of which 80% are women, 89% are Caucasian, 53% are over the age of 40, and 51% hold a post graduate degree (AFP, 2016).

on the higher education sample only), a logit on being a president or vice president of the organization (higher education sample only), and logits on ways to learn fundraising (higher education sample only). These were the dependent variables of interest.

Several questions requested information about fundraisers' professional lives and gave voice to the participants. The resulting qualitative data were analyzed in an iterative, back and forth process between the authors. Coding for meaning, the authors identified salient, common responses. To improve intercoder reliability, the data were first coded independently, next codes were recalibrated through ongoing data examination, and then codes were assigned to broader themes (Creswell, 2007). Finally, codes and themes were quantified to illustrate relative frequency, and all data were coded a second time for validity (Miles & Huberman, 1994).

Findings

Descriptive analysis of the higher education responses shows that the higher education sample was majority female (68%), Caucasian (89%), and educated (57% held a master's degree, professional degree, or terminal degree). Most were in a director or manager position (57%) and the mean annual salary was \$97,932. The average female fundraiser was age 44 while the average male fundraiser was 46 years old. Men and women tended to enter the profession by age 30 (median age 27) and had worked in fundraising for about 15 years at the time of the survey. Nearly 75% of the sample had current areas of expertise that suggested involvement with frontline fundraising. Table 1 provides an overview of fundraisers' demographics and characteristics based on gender, race, age (under/over 50 years), and years worked in the nonprofit sector. Table 2 shows the regression analyses, comparing U.S. higher education fundraisers (n=508) to the full study sample (n=1,826) and allowing for key comparisons about income, organizational title, age upon entry into fundraising, and formal education in fundraising.

--Insert Table 1 and Table 2 here--

Regression analysis using "working in the higher education subsector" as a binary independent variable indicates more men and older people in the higher education sample than among the broader population of fundraisers surveyed. Higher education fundraisers were more educated. They were not more diverse than their non-higher education peers.. Higher education fundraisers earned more money than those outside postsecondary institutions. Being a fundraising officer, director/manager and vice-president/president were all significantly related to working in higher education, not surprisingly given the larger size of fundraising organizations in higher education.

Participants spent a mean of four years in each fundraising job. Gender, race, expertise, and position were not relevant in age of entry to the profession. But, income was negatively

related to age of entry—thus the earlier a fundraiser entered the profession, the greater income they had, but age of entry did not appear related to their place on the career ladder. Having frontline fundraising expertise was highly significant in relation to imputed income. Those who entered fundraising at an older age were significantly more likely to hold higher academic degrees (See table 3).

--Insert Table 3 and Table 4 here--

Fundraisers learned their jobs through a combination of professional education (such as via workshops and trainings with the assistance of mentors) and on the job experience. Only 16.7% of individuals learned fundraising through formal (academic) education. Males were more likely to have learned by formal education as were those with more advanced educational credentials. Being older was significantly associated with learning through professional (and certificate) education, depending on mentorship and being self-taught (See table 4).

Men outpaced women in terms of income and attaining the highest leadership positions, in a statistically significant manner. Men also held more advanced degrees and were significantly more likely to have learned fundraising through formal education. Although people of color earned advanced degrees at about the same rate as Caucasian fundraisers, they still made less money (\$91,923 vs. \$98,854); however, this was not statistically significant when controlling for other factors. Fewer people of color held top leadership roles (7.4% were vice presidents or presidents compared with 15% of Caucasian fundraisers) and fewer had learned fundraising through formalized education and training although the latter was not statistically significant.

Areas of professional knowledge, personal characteristics and traits, learned of successful fundraisers

Participants were asked to respond to the following prompt:

Think of the fundraising professional that you believe is the most competent and successful of all those you know. In the designated spaces below, please list up to three **(A) personal characteristics or traits**, **(B) learned skills**, and **(C) areas of professional knowledge** (facts and concepts that fundraisers know, learned either in formal settings or on the job, that are generally considered to be common knowledge within the nonprofit sector) that you believe have contributed most to this person's effectiveness.

Each participant was invited to provide 3 each of personal characteristics/traits, learned skills, and areas of expertise. Not all participants responded to each prompt, and some provided fewer than 3 items for each. This resulted in varying numbers of observations for each category of information. Table 5 illustrates the 1,146 (n=425) responses regarding the areas

of professional knowledge organized into five domains. Approximately one-third of responses noted the primacy of specialized knowledge for fundraising, including how to manage the fundraising process through what is often called, “the fundraising cycle,” using terminology like “cultivation,” “making the ask,” “donor management,” and “stewardship.” Next, fundraisers indicated the necessity of understanding various fundraising programs and strategies; by far the most commonly cited was an understanding of planned giving followed by various gift vehicles. Maintaining a professional outlook was also deemed important, including fundraising and institution-specific knowledge and, to a lesser degree, awareness of standards of professionalism, research information, and ethical grounding. Understanding the organizational functions that support fundraising, including human resource management, finance, and marketing, garnered 11% of responses. Finally, 6% of responses indicated that knowledge of effective communication strategies—interpersonal, oral, and written—was a necessity.

--Insert Table 5 here--

Survey participants (n=482) provided 1,416 personal characteristics/traits of successful fundraisers. The personal characteristics/traits fit within six domains represented in Table 6. Characteristics of emotional intelligence, such as being a people person and an effective communicator, were most frequently cited (35.6% of all responses). To be achievement oriented and ethically grounded were next in commonality and were closely equated in importance. A demonstrated commitment to mission as evidenced by dedication, passion, and determination was another important personal feature. Successful fundraisers, the participants reported, were other-centered individuals who demonstrated compassion, caring, and patience. Finally, intellectual adeptness was necessary for fundraisers as they managed their knowledge of the field, organizational needs, and the wishes of the donors.

--Insert Table 6 here--

When asked about the learned skills of the most successful fundraisers, participants (n=466) provided 1,292 wide ranging responses (see Table 7). Along with learned skills, 19.6% of answers were coded as personal attributes such as curiosity, cheerfulness, and humbleness. Another 9% of responses were coded as professional knowledge including donor psychology and fundraising basics. That left 922 responses, or 71.3%, that were coded as learned skills. The most common learned skill was oral and written communication (13.3%) followed closely by interpersonal communication (10.1%), listening skills (7.5%), and donor engagement (5.0%). Responses such as “the ability to appropriately cultivate and guide a prospective donor through the donor engagement process to get them to the point of solicitation” indicates how closely aligned learned skills and professional knowledge are for successful fundraising.

--Insert Table 7 here—

On improving the profession

Respondents were asked to reflect on their own and others' perceptions of fundraising using a scale of negative 3 (very negative) to positive 3 (very positive) (see Table 8). They felt positive about their profession, scoring a median of 2. Yet, they believed that those outside of fundraising held less positive views, rating outsiders' perceptions at zero.

--Insert Table 8 here --

385 participants provided suggestions for improving the profession (see Table 9). While comments ranged from specific organizational issues—such as eliminating phone solicitation—to a broad need for sector-wide benchmarks, an overwhelming majority of suggestions related to further professionalizing fundraising through training, certification, formal education, standardization, and ethical practice. There was a strong desire to educate the general public about the role nonprofit organizations, philanthropy, and fundraisers play in society while promoting the career to a younger generation.

--Insert Table 9 here --

As one participant noted: “So many people don’t understand that it takes knowledge and skill and it’s not just eating out and talking a lot.” Indeed, misconceptions of fundraising plague the profession, perhaps captured by fundraisers’ perceptions noted in Table 3. Educating and training younger fundraisers regarding the existing body of knowledge and ethical standards, as well as best practices, along with robust mentoring, was believed to be an avenue for further professionalizing the field. The desire to be seen as a legitimate profession was well-illustrated by one respondent who said: “Too many people say they fell into fundraising accidentally, which discredits the profession. Doctors don’t go to medical school accidentally.”

Fundraisers also noted the need for adherence to donor-centered practices such as listening to donors and using the kind of internal metrics that reward long-term relationship building. At the same time, individuals stressed the importance of a “long view” in terms of organizational investment in fundraising, goal setting, and expectations. Helping all members of an organization, especially the governing board and senior leadership, understand philanthropy and fundraising, was seen as a method for improvement. In the context of higher education, that meant “better integration with the rest of the university,” and “greater institutional understanding of the process.”

Discussion

The study provides a snapshot of contemporary higher education fundraisers who are predominately white, female, well-educated, and enter the profession by age 30. Results suggest that, despite commitments to diversity and equality, higher education has work to do

in its recruitment, compensation, and promotion practices. Higher education fundraisers are diverse in gender but not in ethnicity; the best salaries, loftiest titles, and highest degree of formal education are most often attributed to white men. Institutions and professional associations recognize that investment is required to change the profile of the modern fundraising team and are beginning to actively build paths to the profession for individuals from a variety of backgrounds (The Editors, 2014).

The breadth of responses to the knowledge, skills, and personal characteristics of successful fundraisers shows the complexity of contemporary fundraising in the academy. It requires a broad base of knowledge and skills along with the variety of personal competencies that hiring managers and leaders must seek, foster, facilitate, and recognize. A diversity of “hard” knowledge and “soft” personality traits are required for facilitating the philanthropic process within higher education and at the sensitive intersection between donors' wishes and the institution's mission.

The Breeze (2017) research and this project indicate that fundraisers need to be able to manage multi-dimensional organizational environments (of all kinds) while still being emotionally intelligent people persons. The Nagaraj (2015) study also presents successful fundraisers as “curious chameleons,” adept at hard and soft skills and intellectually savvy. For the higher education setting, one might infer that a particularly high level of intellectualism is required. Such insights provided by our research and complementary studies can be of use in screening prospective fundraisers during the recruitment and promotion process.

The emphasis on interpersonal communication noted by fundraisers as skill, knowledge, and personal traits indicate the primacy of relationships in successful fundraising. Excellent interpersonal communication supports Boland's argument that it is communications expertise that solidifies fundraising in higher education as a legitimate profession: “Effective communication results from organizing and delivering a persuasive institutional story from developing close rapport with donors through effective face-to-face interaction that is sensitive to donor wishes and that furthers the institution's mission” (Boland, 2002, p.11). Fundraisers must not only convincingly share the story, hopes, and dreams of the institution, but do so with a keen understanding of what motivates prospective donors.

Respondents' desire for additional training, formal education, credentials, adherence to (and enforcement of) ethical principles suggests that fundraising needs to be further professionalized. Tempel and Beem, writing in 2002, believed fundraising was no closer to becoming a profession than it had been many years earlier. Given participants' desire to improve fundraising, it appears the field still struggles in similar ways regarding reputation, an established body of knowledge, and self-governance. Fundraisers themselves need to continue their efforts across practical, intellectual, and social domains to manage the development of their own profession. In higher education, they can also work inside their

institutions to better inform others about fundraising operations and integrate with the academic culture (Daly, 2013; Nyman et al., 2016).

This analysis shows that certain competencies—such as ethical grounding and communication ability, which were reported as being both knowledge and personal characteristics—should be honed by discipline-specific training. While fundraisers may possess instinctual ideas and strengths derived from common sense, personal experience, and values, nonetheless education and normative grounding are also required to guide effective decision-making (for example, when determining whether and how to structure and accept a gift with ideological underpinnings). Promoting awareness that fundraising requires not only interpersonal skills but also a field-specific knowledge-base is essential if the occupation hopes to achieve the status and respect of the profession (Evetts, 2003).

In this research, the respondents noted the importance of ethics and perceived ethical training as a key approach for understanding the profession. In the U.S., the AFP Code of Ethics serves as a standard for members' ethical practice. Moving beyond AFP's general guidelines, Caboni (2010) provided specific detail on the norms for ethical fundraising within post-secondary education. Interestingly, the Nagaraj (2015) study is but one example of research that did not mention ethics. Nonetheless, our study strongly suggests the need for both internal and external constituencies to develop clear understandings of the norms and expectations of good, ethical practice.

The participants placed importance on "industry knowledge" and "best practices," but they did not emphasize theory, research, or higher education "sector" studies as key sources of this information. Only 3.8% indicated that institutional knowledge was a key component of professional knowledge. It is possible that this study's participants may have considered this knowledge relevant but not important enough to list among the top three priority items, and perhaps a sub-sample of the fundraising leaders in the study would have placed this knowledge higher. It is worth making note that previous research (Daly, 2013; Nyman et al., 2016; Worth & Asp, 1994) indicated the importance of sophisticated and political knowledge that higher education fundraisers need to function in their complex environments. Nyman et al. (2016) identified the qualities unique to a principal gift officer – networker, negotiator, and knowledge-broker, which together require the individual to understand and navigate the institutional environment just as well as she must understand the donor's intentions. Providing opportunities for fundraisers to engage with institutional leaders, faculty members, and the breadth of an institution's activities allows fundraisers to hone their institutional savvy and networks.

Many respondents suggested that additional education, in the form of training and degree programs, would help improve the profession. It is notable that education sector fundraisers did not themselves believe there are suitable opportunities for education on fundraising. Only 16.7% indicated they had learned fundraising through formal education, suggesting that a

stronger emphasis on research and knowledge-driven practice (rather than relying on supposition or anecdotal example) may benefit fundraisers practically. Enhanced formal education and training suggest that a more business-like orientation for philanthropy (Worth, 2016) will sustain the values and relational-basis upon which good ethical practice is based.

This study reveals the need for further research to analyze how professional knowledge, learned skills, and personality characteristics may vary by fundraising position or by organizational mission. There is ample opportunity to undertake comparative analyses (for example, between higher education and the health care sector or between different demographic groups or participants) and to bring alternate theoretical perspectives (such as theories of professional identity) to bear in analyzing qualitative results. This study had a number of limitations including a low response rate and reliance on self-reported data, highlighting the need for further studies to capture a larger sample, to add donor/non-fundraiser perspectives, and to examine depth—as well as breadth—of experience.

Conclusion

As colleges and universities increasingly rely on philanthropy to support their activities, their awareness of the importance of, and desire for, trained fundraisers grounded in ethical practice grows correspondingly. Fundraising ability is not simply concerned with traits and proclivities that some have and some do not. Yet some observers continue to perceive fundraising as an “art” rather than as a skills and knowledge-based endeavor requiring an ethical and standards-based education. Without greater wide-spread communication with the public about the facts regarding fundraisers, it will remain difficult for the occupation to become more formalized, better understood, and professional. Future recruitment of professional fundraisers with the necessary skills, knowledge, education, training, and commitment to continuing professional development—as well as interpersonal savvy—will be at risk until there is a more sophisticated societal understanding of the role and practice of fundraisers. Fundraising will be recognized as a professional practice when the general public is convinced that it is.

This study contributes a holistic perspective about what fundraisers think is needed for the future of higher education fundraising, while also documenting the current context in the field. The education and knowledge that fundraisers want for themselves, their desire to eradicate misperceptions about the field, their drive to enforce ethical standards, and their need to draw attention to donor-centered practices are more than admirable. They define a rationale for a continuing emphasis on professionalization as a model for the field. By working together to build information about successful fundraiser practices and what it really means to do this work, higher education fundraisers can advance the ongoing dialogue about their work as occupation or profession. Fundraisers in higher education have an opportunity and perhaps a duty to draw on the context of their sector to define success not only by dollars raised but also by their ability to contribute to colleges and universities' public good missions

in ethical, thoughtful, and inspired ways precisely because they are becoming a knowledge-based profession.

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Table 1: Higher education fundraiser demographics, and by gender, race, age, nonprofit experience

	Mean	SD	Male	Female	Caucasian	People of color	Under 50 years	50 years old and over	Under 10 years np work	10 or more years np work
Number in sample = 508			163	338	446	54	303	202	163	333
Income (Imputed)	\$97,932	\$44,236	\$112,168	\$91,152	\$98,854	\$91,923	\$86,483	\$114,845	\$73,851	\$110,625
Education		0.648								
Less than bachelor's	0.60%		0.60%	0.60%	0.50%	1.90%	0.30%	1.00%	0.00%	0.90%
Associate's/Bachelor's	42.30%		34.40%	45.90%	41.90%	40.70%	45.20%	38.10%	48.50%	38.70%
Some grad/Master's	48.00%		53.40%	45.60%	48.40%	48.20%	47.50%	49.00%	46.60%	49.60%
Doctoral/Professional	9.10%		11.70%	8.00%	9.20%	9.30%	6.90%	11.90%	4.90%	10.80%
Master's degree or more	57.10%	49.50%	65.00%	53.60%	57.60%	57.40%	54.50%	60.90%	51.50%	60.40%
Position		0.702								
Coordinator/Other	3.20%		2.50%	3.60%	3.60%	0.00%	3.30%	3.00%	4.30%	2.70%
Fundraising officer	25.60%		22.70%	26.60%	24.70%	31.50%	22.40%	30.20%	22.10%	26.70%
Director/Manager	57.10%		52.80%	59.50%	56.70%	61.10%	65.70%	44.60%	69.30%	51.40%
President/Vice President	14.70%		22.10%	10.40%	15.00%	7.40%	8.60%	22.30%	4.30%	19.20%
Current area of expertise										
Frontline fundraising	75.40%		79.80%	72.80%	75.60%	70.40%	69.30%	84.70%	56.40%	84.40%
Other fundraising	20.50%		16.00%	23.10%	20.20%	25.90%	26.10%	11.90%	36.80%	12.60%
Other advancement	4.10%		4.30%	4.10%	4.30%	3.70%	4.60%	3.50%	6.80%	3.00%
Learned fundraising by:										
Formal education	16.70%		11.70%	19.20%	17.50%	11.10%	18.80%	13.90%	19.00%	15.90%
Fundraising certificate	20.10%		20.90%	20.10%	21.70%	9.30%	15.20%	27.70%	11.00%	24.90%
Professional education	67.50%		66.30%	68.30%	68.20%	63.00%	64.00%	72.80%	61.30%	71.50%
Mentor	62.60%		65.00%	61.20%	63.00%	57.40%	64.70%	59.40%	57.10%	65.80%

On job	91.50%	90.80%	91.70%	91.50%	90.70%	91.10%	92.10%	90.80%	92.50%
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Note: Some participants did not identify their gender and/or race/age. Fewer participants than the full sample, therefore, are included in some portions of this table.

Table 2: Higher education fundraisers in comparison to all fundraisers (Logit odds ratio)

Variables	
Male	1.346** (0.172)
Person of color	1.249 (0.224)
Age (Over 50 years)	0.810* (0.100)
Education (AA/Bachelor's omitted)	
Less than bachelor's	0.217** (0.135)
Some graduate/Master's	1.229* (0.145)
Doctoral/Professional	2.619*** (0.653)
Income (Imputed)	1.000*** (1.41e-06)
Current position (Coordinator/Other omitted)	
Fundraising officer	3.661*** (1.077)
Director/Manager	3.256*** (0.911)
President/Vice President	1.777* (0.565)
Current area of expertise (Other advancement omitted)	
Other fundraising	1.713* (0.533)
Frontline fundraising	0.881 (0.252)
Constant	0.0766*** (0.0299)
Observations	1,583

Robust seeform in parentheses

*** p<0.01, ** p<0.05, * p<0.1

Table 3: Higher education fundraisers income, president/vice president, age when entering the field

Dependent Variable	Imputed income	Log imputed income	President or vice president	Age entered fundraising
VARIABLES	OLS	OLS	Logit Odds Ratios	OLS
Male	10,453*** (3,654)	0.0919*** (0.0339)	2.320*** (0.641)	0.286 (0.681)
Person of color	648.7 (4,546)	0.0342 (0.0485)	0.367 (0.229)	1.270 (0.932)
Age (Over 50 years)	15,239*** (3,323)	0.163*** (0.0316)	2.866*** (0.802)	11.66*** (0.760)
Education (AA/Bachelor's omitted)				
Less than Bachelors	24,272 (34,538)	0.162 (0.335)	3.254 (3.525)	-6.361*** (2.023)
Some graduate/Master's	3,276 (3,084)	0.0417 (0.0310)	1.242 (0.378)	1.254** (0.626)
Professional/Doctorate	11,563* (6,926)	0.128* (0.0653)	1.940 (0.883)	5.695*** (1.499)
Income (Imputed)				-4.86e-05*** (9.26e-06)
Current position (Coordinator/Other omitted)				
Fundraising Officer	-7,809 (15,171)	0.0264 (0.157)		-0.535 (1.579)
Director/Manager	-7,255 (14,964)	0.0475 (0.155)		1.261 (1.496)
President/Vice President	51,942*** (15,602)	0.538*** (0.157)		-1.915 (1.756)
Current area of expertise (Other advancement functions omitted)				
Other fundraising	-3,081 (6,777)	-0.0690 (0.0768)		-0.894 (1.673)
Frontline fundraising	20,257*** (6,484)	0.225*** (0.0720)		-0.519 (1.636)
Constant	70,135*** (15,292)	11.01*** (0.161)	0.0611*** (0.0184)	28.95*** (2.181)
Observations	480	480	480	480
R-squared	0.435	0.420		0.421

Robust standard errors in parentheses. Note: The imputation of income is a midpoint imputation, not one based off of independent variables.

*** p<0.01, ** p<0.05, * p<0.1

Table 4: How higher education fundraisers learned fundraising (logit odds ratio, with learning options as dependent variables)

Variables	Learned by Formal Education	Learned by Continuing Education	Learned by Mentor	Learned by on the Job
Male	0.455** (0.140)	0.891 (0.193)	1.052 (0.217)	0.941 (0.355)
Non-White	0.671 (0.331)	0.828 (0.258)	0.701 (0.217)	0.952 (0.478)
Age (Over 50 years)	0.651 (0.189)	1.580** (0.345)	0.694* (0.142)	1.068 (0.339)
Education (AA/Bachelor's omitted)				
Less than Bachelors	-- --	0.212 (0.243)	1.793 (1.913)	0.0828* (0.116)
Some graduate/Master's	3.706*** (1.124)	1.150 (0.239)	0.985 (0.198)	0.883 (0.313)
Professional/Doctorate	3.153** (1.533)	1.779 (0.733)	1.403 (0.517)	0.730 (0.420)
Income (Imputed)	1.000 (3.75e-06)	1.000 (2.96e-06)	1.000 (2.89e-06)	1.000 (4.65e-06)
Current Position (Coordinator/Other omitted)				
Fundraising Officer	0.438 (0.284)	0.659 (0.453)	1.882 (1.117)	1.155 (0.667)
Director/Manager	0.821 (0.494)	0.781 (0.523)	2.033 (1.167)	1.220 (0.643)
President/Vice President	1.098 (0.770)	1.194 (0.884)	2.620 (1.674)	-- --
Current area of expertise (Other advancement functions omitted)				
Other fundraising	0.462 (0.273)	1.449 (0.774)	1.235 (0.601)	2.791 (2.177)
Frontline fundraising	0.525 (0.293)	1.289 (0.654)	1.290 (0.587)	1.413 (0.905)
Constant	0.434 (0.352)	2.048 (1.687)	0.603 (0.446)	4.058 (4.183)
Observations	477	480	480	465

Robust seeform in parentheses. *** p<0.01, ** p<0.05, * p<0.1

Note: Regression failure/success was perfectly predicted leading to the omission of observations in two cases.

Table 5: Personal characteristics/traits of a successful fundraiser

<i>Characteristic</i>	<i>Rate</i>
Emotionally intelligent	35.6%
Interpersonal communicator	13.3%
People person	11.7%
Enthusiastic	8.6%
Adaptable	2.0%
Achievement oriented	21.5%
Motivated	4.4%
Organized	3.7%
Disciplined	3.2%
Professional	3.1%
Bold	2.5%
Goal-oriented	2.3%
Strategic	2.3%
Ethically grounded	16.9%
Ethical	10.0%
Authentic	4.4%
Trustworthy	2.4%
Other centered	10.0%
Empathetic	3.1%
Caring	2.5%
Patient	1.6%
Compassionate	1.4%
Conscientious	1.4%
Mission focused	8.3%
Passion	3.6%
Dedication	2.7%
Determination	2.0%
Intellectually adept	7.8%
Intellectual	5.3%
Creative	1.7%
Analytical	0.7%

Note: Respondents were invited to provide three characteristics/traits. Of the 508 survey participants, 482 provided a total of 1416 traits.

Table 6: Professional knowledge of a successful fundraiser

<i>Knowledge</i>	<i>Rate</i>
Managing the fundraising process	34.2%
Donor engagement	7.2%
Solicitation	6.3%
Fundraising cycle	5.8%
Stewardship	5.0%
Cultivation	3.9%
Research and analysis	3.8%
Prospective donor identification	2.0%
Fundraising programs and strategies	28.9%
Planned giving	11.3%
Gift vehicles	7.0%
Annual giving	3.2%
Foundation/Corporate giving	2.8%
Campaign management	2.4%
Major gifts	1.5%
Maintaining professional outlook	17.9%
Industry information	4.8%
Legal and tax basics	4.6%
Institutional knowledge	3.8%
Ethics	1.5%
Donor psychology	1.4%
Holding professional credential/degree	0.7%
Organizational functions for fundraising	11.3%
Internal administration	5.2%
Finance	2.1%
Volunteer management	1.7%
Marketing	1.2%
Measuring performance	1.1%
Communicating effectively	6.0%
Oral/written communication	3.4%
Interpersonal communication	2.6%
Personal attributes	2.7%

Note: Respondents were invited to provide three areas of professional knowledge. Of the 508 survey participants, 426 provided a total of 1146 areas.

Table 7: Learned skills of successful fundraisers

<i>Skill</i>	<i>Rate</i>
Learned skills	71.3%
Oral/written communication	13.3%
Interpersonal communication	10.1%
Listening	7.5%
Donor engagement	5%
Personal attributes	19.6%
Knowledge	9.0%

Note: Respondents were invited to provide three learned skills. Of the 508 survey participants, 466 provided a total of 1292 skills.

Table 8: Fundraiser perceptions of fundraising (n=508)

	Mean	Median	SD
From -3 to 3, what is YOUR ranking of how you feel about fundraising?	2.1102	2	1.0564
From -3 to 3, how would you rank how people OUTSIDE of fundraising feel about fundraising?	0.0276	0	1.3628

Table 9: Ways to improve the profession (n=385)

Learning the profession	29.6%
Training	11.7%
Professional education	10.1%
Recruitment into the profession	3.1%
Mentoring	2.9%
Certification	1.8%
Organizational support for fundraising	29.4%
Balanced approach to metrics	7%
Organizational culture of philanthropy	6.5%
Collaboration	5.5%
Realistic expectations	4.7%
Supportive management	3.4%
Other	2.3%
Fundraisers' interaction with donors	21%
Donor centered	10.4%
Ethical practice	6%
Transparency	4.7%
Enhancing the profession	20%
Educate the public	6.8%
Professionalization (generally)	4.7%
Improve retention	3.1%
Standardization	1.8%
Diversity and equity efforts	1.8%
Improve compensation	1.8%