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The Art Of Listening: A Phenomenological Case Study Exploring The Lived Experiences Of Alumni Donors At A Private Graduate School

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THE ART OF LISTENING: A PHENOMENOLOGICAL CASE STUDY EXPLORING THE
LIVED EXPERIENCES OF ALUMNI DONORS AT A PRIVATE GRADUATE SCHOOL

A Dissertation

Presented to the

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By

Ashley Jones Farrington

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THE ART OF LISTENING: A PHENOMENOLOGICAL CASE STUDY EXPLORING THE
LIVED EXPERIENCES OF ALUMNI DONORS AT A PRIVATE GRADUATE SCHOOL

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Abstract

The increasing importance of alumni philanthropic support in higher education makes the understanding of graduate school alumni giving through the lens of a donor vital. Using a phenomenological approach, this case study examined the lived experiences of alumni donors at a private graduate school to gain a deeper understanding of alumni donor motivations, their decision-making processes regarding gifts, and their overall interactions with the institution and its development officer. Criteria for the selection of participants included alumni status, a representation from a variety of career paths, and a philanthropic giving history of \$10,000 or more. Participants spanned eight decades of graduation years, from 1950-Present. Alumni were invited to participate in an individual interview, which served as the primary data source. The findings in this case study suggest that a strong sense of community and belonging, a responsibility for giving back and paying forward scholarships received as students, and fulfillment in and thankfulness for their education served as the primary factors in driving philanthropic support. Additionally, being invited back to campus as an alum, feeling meaningfully connected with the school and staff, and having confidence in the impact of their gift significantly impacted alumni donors. These findings illustrate that donor motivation is multifaceted, with philanthropic decisions influenced by a blend of personal experiences, values, and practical considerations. Understanding these motivations can help institutions of higher education tailor their engagement and fundraising strategies to connect more effectively with alumni donors, emphasizing aspects that resonate most with their unique motivations and circumstances.

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CHAPTER 1

INTRODUCTION

Cultivating meaningful rapport with alumni plays an important role in the fabric of colleges and universities. Alumni relationships not only provide a framework for lifelong engagement with an institution but also facilitate the benefit of a graduate's ongoing devotion, loyalty, and connectivity to their alma mater (Weerts & Ronca, 2008). Alumni serve in a variety of valuable ways that build and enhance a school's profile, from attending on-campus events, such as athletic competitions, faculty engagements, and class reunions (Hunter et al., 1999), to assisting current students with mentorship, internship, and career opportunities (Weerts, 1998). Beyond making connections for the institution through their professional and social networks, prominent alumni may also volunteer their expertise through a seat on the governing or advisory boards and help develop the strategic direction for the school (Weerts, 1998). Furthermore, alumni generate much-needed operational revenue through annual donations, which aids in balancing the fiscal distress that many campuses face because of significant funding reductions (Weerts & Ronca, 2007).

A major reason for this financial delta, particularly at public institutions, surrounds the failure of federal and state funding to keep stride with the increasing costs of higher education (Nadworny, 2019). In the 2017-2018 academic year, state subsidies for public 2- and 4-year colleges total \$6.6 billion less than in 2008, after adjusting for inflation (Nadworny, 2019). Institutions responded to these substantial cuts by increasing tuition, streamlining course offerings, eliminating faculty, and shuttering entire campuses, which, consequently, reduced

student access, diminished educational quality, and jeopardized instructional outcomes (Mitchell & Leachman, 2015). For colleges and universities confronting revenue shortfalls, a reliance on philanthropy as a supplemental source of income remains critical in maintain academic excellence, increasing scholarships, expanding teaching and learning, and elevating the student experience. Pooch and Siegel (2005) assert, “private support is doing more and more of the work traditionally done by state appropriations, tuition, and government support” (p. 17).

Alumni are often the most likely individuals to donate to institutions of higher learning (Clotfelter, 2003). According to Clotfelter (2003), personal connections to their alma mater play a prominent role in shaping how much and how frequently they choose to donate. In other words, alumni tend to possess a strong emotional bond to their colleges and universities and hold their alma maters in high esteem. This connection might motivate them to contribute philanthropically to their former institutions and can result in a consistent and sustained pattern of giving over time (Clotfelter, 2003).

Reinvesting in one's alma mater can offer a vehicle for alumni to stay connected to the school and to give back to an institution that played an important role in their lives (Clotfelter, 2003). According to the Voluntary Support of Education survey administered through the Council for Advancement and Support of Education, alumni donations to higher education institutions in the United States (U.S.) increased 10.8% in the fiscal year ending June 30, 2021 (Kaplan, 2022). For this reason, among others, alumni embody the core demographic of an institutions' fundraising efforts (Drezner, 2011).

Like their undergraduate counterparts, graduate schools often face a gap between their tuition income and the cost of the educational experience. Given that private graduate schools are not controlled by a government or state agency, they typically do not receive state funding and

rely much more heavily on tuition and donations to cover their operating costs, such as building maintenance, faculty salaries, and educational resources. Since tuition covers only a percentage of the total cost of offering a well-rounded educational experience, the rest is usually supported by fundraising vehicles such as annual funds, endowments, donor-restricted gifts, and corporate and foundation gifts (Drezner, 2011). Fundraising enables graduate schools to offer financial aid and discounted tuition rates to incoming students, making the education more accessible for those who might not have been able to afford the tuition otherwise. This access, in turn, promotes inclusivity and diversity within the student body. Given the highly competitive nature of the education sector, graduate schools often compete for students and faculty with other institutions. Philanthropic support can supplant the costs and help private graduate schools stand out by offering distinctive programs, modern facilities, and cutting-edge technologies, thereby enhancing their brand and reputation in the ever-evolving educational landscape (Drezner, 2011).

Statement of the Problem

Currently, 28.7 million people in the U.S. earned a master's, doctoral, or professional degree, comprising 13% of the U.S. population (U.S. Census Bureau, 2019). Of the 4.3 million students projected to graduate in 2021, 20.8% will earn master's degrees and 4.7% will earn doctorates or professional degrees (Hanson, 2021). The significance of this population becomes heightened as educational institutions place greater reliance on donations from their graduates to enhance the quality of the educational experience and further their long-term institutional goals (McDearmon & Shirley, 2009; Weerts, 2009). Total charitable contributions to higher education institutions in the U.S. totaled \$49.5 billion in the fiscal year that ended June 30, 2020 (Kaplan, 2021). Behind foundations, alumni (combining both undergraduate and graduate populations)

make up the second largest contributors to colleges and universities, collectively donating over \$11 billion in 2020 (Kaplan, 2021).

In their study of successful fundraising in higher education, Duronio and Loessin (1991) suggested that "one of the few general rules to be gleaned from our research is that fundraising must capitalize on the 'untapped potential' of institutions" (p. 224). Recognizing that graduate alumni provide a significant stream of philanthropy in higher education, exploring the motivations that influence their engagement and giving behavior can promote meaningful improvements to an institution's current fundraising practices and aid colleges and universities in growing the engagement and "untapped" giving potential of their graduate alumni population.

Theoretical Framework

Sulek (2009) asserted that philanthropy be explained "as the application of private means to public ends" (p. 201). Human behavior and motivations are often complex and multifaceted, and philanthropic motivations prove no exception. According to Bekkers and Wiepking (2011), charitable giving is rarely driven by a single influencer. Instead, the authors noted eight mechanisms that drive charitable giving: (a) awareness of need, (b) solicitation, (c) costs and benefits, (d) altruism, (e) reputation, (f) psychological benefits, (g) values, and (h) efficacy (Bekkers & Wiepking, 2011). Given the innumerable reasons why donors choose to give, I narrowed the focus by examining donor motivations through the constructs of the social exchange and self-determination theories (Deci & Ryan, 1985).

Social Exchange Theory

According to Drezner (2009), the theory is applicable to nearly every human relationship, including the "give and take" bond between alumni and their college or university. Within the context of higher education, a positive, mutually beneficial relationship includes one in which

the alumni and the institution acknowledge that the reward outweighs the cost. The exchange, both tangible (e.g., volunteering time, social connections) and intangible (e.g., quality of education, career trajectory), propels alumni to vest an interest in their alma mater and ultimately feel more confident about investing in their alma mater (Weerts & Ronca, 2008).

The connection between the social exchange theory and philanthropy lies in the idea that individuals may engage in philanthropic activities based on a perceived exchange of benefits. Kelly (2002) wrote, “Based on social-exchange theory, the mixed motive model of giving describes two levels of donor motivation: (1) raising the amount of common good...and (2) receiving some private good in return” (p. 46). To that end, institutions need to demonstrate “the capacity to provide products and services that donors view as important” (Duronio & Loessin, 1991, p. 220).

Self-Determination Theory

Deci and Ryan (1985) posited that humans are motivated by the goal of experiencing both success and contentment in life. Their construct of self-determination theory noted that human motivation is rooted in three universal psychological needs:

1. **Autonomy:** The need to experience a sense of choice and control over one's actions and decisions.
2. **Competence:** The need to feel capable and effective in one's actions.
3. **Psychological Relatedness:** The need for social connections and a sense of belonging with others.

Self-determination theory distinguishes between two types of motivation, intrinsic and extrinsic (Deci & Ryan, 1985). Intrinsic occurs when individuals engage because they find an activity inherently interesting and satisfying. Intrinsic motivation is driven by the activity itself.

Extrinsic, in contrast, occurs when individuals engage not because the activity is inherently enjoyable but because their participation leads to tangible rewards, like money, prizes, or praise.

The theory explores how satisfying the three psychological needs (autonomy, competence, and psychological relatedness) positively influence individual motivation, social functioning, and personal well-being. Additionally, environmental factors can either facilitate or hinder these needs and, consequently, an individual's motivation and well-being (Deci & Ryan, 2008). These three constructs will provide a foundation for exploring the phenomenon of the lived experiences of alumni donors in this study.

Research Questions

The increasing importance of alumni philanthropic support in higher education makes the understanding of graduate school alumni giving through the lens of a donor vital. Using a phenomenological approach, the purpose of this case study involved examining the lived experiences of alumni donors at a private graduate school. Through the following research questions (RQ), I aimed to explore the alumni who currently engage with and donate to their graduate school alma mater and the lived experiences that led them to philanthropically support the institution:

1. What factors do alumni donors use to describe their motivation to give?
2. How do they explain their decision-making process when making a gift?
3. Which interactions with the institution contributed to their willingness to donate?

Significance of the Study

Although alumni engagement has been researched at the undergraduate level, the 2020 Voluntary Support of Education report (Kaplan, 2021) demonstrated that alumni are more likely to philanthropically support their undergraduate institution, rather than their graduate school

alma mater. Given this finding, distilling the two segments and studying graduate student alumni giving is essential, as graduate alumni encompass a substantial percentage of the donor population at many institutions.

The findings from this case study might further verify the importance of building strong relationships with graduate school alumni, since these alumni play an integral role in the financial well-being of postsecondary institutions (Weerts & Ronca, 2007). By understanding the giving motivations of alumni donors at the graduate school level, the implications of quality findings might improve an institution's effectiveness in building a culture of engagement and philanthropy that nurtures future alumni participation and giving. Moreover, since most of the current studies on alumni giving center on philanthropy within the undergraduate population, the results might address a gap in the literature relative to graduate school alumni giving and add evidence-based research to the body of knowledge that might influence the work of institutional fundraising teams in graduate schools across the country.

Definitions of Terms

Cultivation: To engage and maintain the interest of a donor with an organization's people, programs, and plans (Association of Fundraising Professionals, 2023).

L-A-I (linkage, ability, interest): The three factors that indicate the likelihood of a major gift.

Linkage is the tie to an organization; ability is the capacity for giving; interest is the concern about the cause or project (Association of Fundraising Professionals, 2023).

Stewardship: The process of honoring philanthropic support, including the acknowledgment of gifts, the fulfilling of donor intent, and the effective and efficient use of funds to further the mission of the organization (Association of Fundraising Professionals, 2023).

CHAPTER 2

REVIEW OF RELATED LITERATURE

The idea of *philanthropy* originates from the Greek term *philanthropia*, which translates to “loving people” (Merriam-Webster, n.d.). According to Payton (1989), philanthropy encompasses voluntary contributions, acts of service, and relationships rooted in the intention of benefiting and serving others. Van Til (1990) noted that philanthropy entails a multilayered exchange of resources, influence, values, and expectations between the giver and the recipient. Often, because of their parallel definitions, the terms *charity* and *philanthropy* are used synonymously; Bremner (1994), a prominent scholar in the history of fundraising, distinguished between charity and philanthropy as a measurement of concern for the less fortunate. He characterizes charity as stemming from religious and altruistic origins, while he describes philanthropy as more secular in nature. A substantial body of literature posits that generosity and giving is an inherent aspect of the human condition (Bremner, 1994; Gaudiani, 2003; Jacobs, 2007).

Establishing the motivation behind that component of the human condition embodies an essential element of this study. In reviewing the literature and attempting to conceptualize alumni giving behaviors, several key themes rose to the surface and informed a greater understanding of alumni philanthropy. For this research, the most relevant literature is organized into seven main categories: philanthropy in higher education, the development officer, alumni giving, graduate school alumni giving, donor motivations, individual characteristics, and the two theoretical frameworks of social exchange and self-determination, on which the research is underpinned.

Philanthropy in Higher Education

Because private 4-year institutions receive modest government funding, philanthropy has paved the way in American higher education since its inception (Perry, 1998). As Kirp (2003) stated, “dollars have always greased the wheels of American higher education” (p. 3). In 1828, Yale created the country’s first alumni organization, with graduate donors rallying together and initially raising nearly \$100,000 to serve their alma mater (Perry, 1998). By 1869, Harvard generated \$2.2 million in donations and the following year, American colleges collectively raised between \$8 and \$9 million annually from private gifts (Perry, 1998). By 2022, this number had exponentially grown to \$59.5 billion (Kaplan, 2023). As Bremner (1994) noted, these numbers demonstrate the “machinery of benevolence” (p. 86) that continues to influence higher education centuries later.

The literature emphasizes the significance of leadership as a crucial factor in successful fundraising at higher education institutions (Duronio & Loessin, 1991). Specifically, the active involvement of the college or university’s president in fundraising activities is identified as a vital component for effective philanthropy (Lasher & Cook, 1996). The development officer, responsible for securing the requisite philanthropic gifts for academic and institutional growth and fostering relationships that support the institution’s mission and objectives, is also recognized as an essential player in achieving fundraising goals (Duronio & Loessin, 1993). Other key stakeholders, such as trustees, deans, volunteers, and friends of the institution, might also hold important fundraising duties at some institutions, because their dedication, engagement, and support contribute significantly to the success of fundraising campaigns and initiatives (Lasher & Cook, 1996; Duronio & Loessin, 1993).

In summary, philanthropy has played a substantial and enduring role in the history of higher education. The relationship between educational institutions and philanthropic support is a long and rich one, and charitable contributions have long shaped the landscape of college and universities nationwide. Fundraising at higher education institutions relies on a collaborative effort among various leadership figures, including the president, the development officer, and a network of individuals who collectively contribute to the institution's ability to secure the necessary resources to advance its mission and strategic goals.

The Development Officer

The field of fundraising is considered a growing and promising career path (Shaker et al., 2022). To establish connections with potential donors and alumni, Croteau and Smith (2012) uphold that effective development officers should demonstrate strong communication skills, a tolerance for complex situations and diverse people, and a high proficiency and proclivity for building authentic relationships. Based on in-depth interviews with fundraisers, Worth (2002) outlined a range of necessary attributes, including intellectual curiosity, self-awareness, critical thinking, tenacity, cultural sensitivity, focus on excellence, motivation and inspiration skills, responsibility, leading by example, talent management, passion for the mission, and strategic thinking.

The key traits of any development officer, according to Panas (2005), center on attentive listening and unbridled enthusiasm, as donors can undoubtedly sense if a development officer is passionate and devoted to their work. Similarly, Worth (2002) notes that excellent interpersonal skills and personal charisma are essential intangibles for development officers, as these qualities prove instrumental in building rapport with donors, establishing trust, and cultivating charitable contributions.

Often, development officers transfer to fundraising from diverse career backgrounds and may identify as experts or professionals in other disciplines (Daly, 2013). Fundraising arms at most postsecondary institutions encompass a wide range of activities and development officers require a broad set of strengths, making the career attractive to individuals with varied career paths. Daly (2013) noted that development officers "bring expertise and skills" from previous professional experiences to their fundraising roles (p. 27). The concept of development officers serving as multifaceted professionals, blending fundraising expertise with sound, transferable skills from other careers is enhanced by the insights of Drezner and Huehls (2014). The authors' proposal reinforces the significance of having a development officer deeply integrated into the institution and its programs, as well as one who seamlessly integrates fundraising into every aspect of their role. In practice, this approach requires individuals who not only excel in fundraising but also possess a profound understanding of the institution's mission, educational programming needs, and strategic goals. Essentially, these development officers are adept at articulating the school's mission to potential donors and aligning fundraising activities with the broader strategic vision of the institution (Drezner & Huehls, 2014). According to Drezner and Huehls (2014), these professionals typically bring a versatile skill set to their roles, encompassing fundraising expertise, program management acumen, effective communication, and strong relationship-building capabilities. Their ability to bridge fundraising with educational initiatives remains instrumental in ensuring that development efforts are closely synchronized with the institution's overarching goals. This synergy contributes to the success and effectiveness of fundraising endeavors (Drezner & Huehls, 2014).

Similar to findings from Drezner and Huehls (2014), Glass and Jackson (1998) earlier suggested that in the role of a development officer does not necessarily hinge on technical

proficiency but, rather, on sound leadership, an understanding best fundraising practices, and staying up to date on the latest trends and forecasts in the field. Drezner and Huehls (2014) suggested that the leadership qualities of a development officer are paramount in driving the educational mission and ensuring the financial health of an institution. This underscores the significance of leadership acumen, strategic thinking, and the ability to adapt to changing circumstances in the ever-evolving field of institutional advancement and fundraising.

Development officers, according to Glass and Jackson (1998), must possess the vital attributes of motivation and self-confidence for effective leadership. Only then, the authors assert, can development officers inspire and influence alumni donors with conviction.

To that end, Drezner (2009) emphasized that cultivating rapport and fostering relationships are essential in the work of a development officer focused on securing gifts:

Building relationships between the institution and its current and prospective donors is arguably the most important aspect of successful solicitation of the largest gifts. In the past, fundraising offices relied on transaction-based marketing. In other words, each year donors were asked to give, and a series of one-time transactions took place. Relationship marketing changes fundraising strategy from a series of one-time transactions to a focus on the donor's lifetime giving. (p. 150)

Chung-Hoon et al. (2005) interviewed development officers at three universities to learn more about the cultivation steps taken to grow a meaningful and authentic rapport with donors. Their findings reinforce the importance of communication, trust, and gratitude in the donor relationship-building process. They align with best practices in donor stewardship and the cultivation of philanthropic partnerships, emphasizing the role of development officers in fostering strong and lasting donor relations (Chung-Hoon et al., 2005).

In summary, development officers serve as bridge between alumni and the institution, facilitating the giving process and creating a meaningful and mutually beneficial relationship between alumni and their alma mater. A development officer's efforts are essential in nurturing a culture of philanthropy and sustaining the financial health of higher education institutions by demonstrating the tangible impact of donations and helping alumni transition from graduates to donors.

Alumni Giving

Researchers agree that emotionally engaged alumni feel more motivated to give back to their alma mater (Clotfelter, 2003; Gallo & Hubschman, 2003; Hunter et al., 1999; Sun et al., 2007; Weerts, 2009). Two predictors for alumni engagement and giving are participation in alumni events and attachment to the institution (Hunter et al., 1999). Moreover, the longer alumni remain engaged, the stronger their connectivity becomes, and the more likely they become to make contributions over time (Weerts & Ronca, 2008). Alumni engagement can embody several forms, including campus visits (Sun et al., 2007); reading alumni newsletters and magazines (Weerts & Ronca, 2008); attending events and participating in alumni social groups (Hunter et al., 1999); or serving in a formal volunteer capacity (Weerts, 1998).

Emotional attachment to the institution has been identified in several studies as a motivator for alumni giving (Ehrenberg & Smith, 2003; Gallo & Hubschman, 2003; Monks, 2003; Pezzullo & Brittingham, 1993; Taylor & Martin, (1995). Gallo and Hubschman (2003) noted, "a sense of belonging creates a strong trend toward motivation to participate" (p. 19). This concept aligns with research by Ford and Merchant (2010), who studied the influence of personal nostalgia on philanthropy. The authors argued that emotional appeal and personal relevance contribute to nostalgia and encourage donor contributions, which highlights the power of

emotions in philanthropy. By tapping into the lived experiences and memories of alumni, colleges and universities can create a more meaningful and personal connection with potential donors, ultimately motivating them to philanthropically support their alma mater (Ford & Merchant, 2010). Emotions and personal experiences are integral to philanthropic behavior. Institutions that understand and harness these emotional connections can better engage alumni donors, inspire support, and ultimately make a more significant impact in addressing their fundraising needs and advancing their strategic goals.

Graduate Alumni Giving

An interesting note worth mentioning involves how the referenced research fails to specifically differentiate between undergraduate and graduate alumni giving. Although substantial studies on alumni giving in higher education exist, the focus of the aforementioned literature has spanned alumni giving in general, rather than making distinctions based on undergraduate and graduate degree levels.

To fill that gap, Okunade (1996) assessed determinants of graduate alumni philanthropy by analyzing data from 278 graduate alumni from the University of Memphis over 16 years of charitable giving. Without access to actual income, the author used proxy income data based on degree type. Okunade segmented JDs, PhDs, and EdDs together in the category of doctoral degrees, even though JDs are typically classified as professional degrees; findings demonstrated that alumni with doctorates have the highest giving profile among graduate school alumni. The inclusion of lawyers in this category and the use of proxy income data might have substantially skewed the results because the earnings profiles of professors and lawyers are not typically comparable. Moreover, this outcome contrasted with the findings of other relevant research like Monks (2003), who discovered that PhD holders do not contribute appreciably more. Okunade

(1996) also found that graduate alumni with undergraduate degrees from the same university had lower giving rates than those with degrees from other universities. This finding, the author observed, defies common sense and might only apply to the University of Memphis. Therefore, the understanding of the motivations of doctorate degree alumni is not significantly advanced by this study due to its reliance on proxy data, imprecise classifications of graduate degree alumni, and data from a single institution.

Three years after Okunade's research, Pearson's (1999) carefully distinguished undergraduate and graduate alumni, conducting market research for Stanford University and offering intriguing comparative data on alumni giving. Findings revealed that graduate alumni were twice as likely to identify with their department as they were with their broader institution. As a result, Pearson (1999) advised department-based fundraising appeals for graduate alumni. Stanford's School of Engineering effectively used this approach, boasting a 28% increase in donations and a 44% increase in participation (Pearson, 1999). Additionally, Pearson (1999) advised using a "two tiered" strategy when communicating with graduate alumni, including both institution-wide messages for all alumni and smaller, more targeted departmental news updates.

The studies discussed in this context distinguished between undergraduate and graduate school alumni giving but failed to incorporate donor perspectives or motivations. They lack insight from donors themselves about why they choose to donate, the extent of their contributions, and their perceptions of their philanthropy. Given the highly personalized and unique nature of the donation decision-making process, a valuable opportunity was overlooked in not collecting data directly from donors through their own words and lived experiences.

Donor Motivations

The social exchange theory is a widely used framework for explaining donor motivations and behavior (Lasher & Cook, 1996; Drezner, 2009; Kelly, 2020). The theory posits that people make decisions based on a rational calculation of costs and benefits in social interactions. In the context of philanthropy and donor behavior, the theory suggests that individuals donate to charitable causes when they anticipate receiving something of value in return, whether it be tangible rewards or social and emotional satisfaction. George Homans (1958) developed the social exchange theory in the late 1950s and noted:

Social behavior is an exchange of goods, material goods but also non-material ones, such as the symbols of approval or prestige. Persons that give much to others try to get much from them, and persons that get much from others are under pressure to give much to them. This process of influence tends to work out at equilibrium to a balance in the exchanges. (p. 606)

Lasher and Cook (1996) contended that fundraising is based on "social exchange processes" (p. 38), which assumes interdependence between individual donors and higher education institutions. According to their findings, alumni may be motivated to contribute to their alma mater if they attribute their personal success to the education they received. This sense of gratitude and recognition of the institution's role in their achievements may serve as a motivation for giving.

Although scant literature focuses on donor decision-making processes through lived experiences, the self-determination theory, as introduced by Deci and Ryan in 1985, serves as a valuable framework for understanding donor motivations. According to Ryan and Deci (2000), the fundamental premise of self-determination theory is that humans are biological beings with

an innate need for psychological growth and development. Wehmeyer (2003) posited that "engaging in an activity with a full sense of wanting, choosing, and personal endorsement" (p. 15) is a requirement for embodying self-determination. The three categories that comprise the self-determination theory include autonomy, competence, and psychological relatedness (Ryan & Deci, 2000).

Autonomy is the ability to self-regulate one's behaviors and actions while achieving goals (Ryan & Deci, 2000). *Autonomy*, as noted by Deci and Vansteenkiste (2004), also manifests itself in an individual's abilities to behave in accordance with one's sense of self. Autonomy, however, does not mean being independent of others (Deci & Vansteenkiste, 2004). Although some scholars have argued that the need for autonomy is not universal and confined to Western culture (Iyengar & DeVoe, 2003), many researchers argue that the desire for autonomy reveals itself as a basic human trait. Ryan and Deci (2006) suggested that the innate desire for autonomy, for instance, provided "greater enjoyment" in "high choice situations" (p. 1576).

Competence is the confidence in one's own abilities (Ryan & Deci, 2000), as well as the need to feel effective in one's own environment (Deci & Vansteenkiste, 2004). To feel competent, Deci and Ryan (2008) and assert that one must experience opportunities to apply their skills and talents and contribute to meaningful and purposeful activities. Philanthropy may fit this expression, as giving back can foster a sense of achievement and personal growth. Attaining appropriate feelings of competence, through either competition with others or with oneself, can serve as a motivational factor, as it can challenge individuals to strive for personal improvement, push their limits, and experience a sense of accomplishment (A. J. Elliot et al., 2002). Competence then, in this framework, is strongly tied to a subjective feeling of confidence and efficacy, not an objectively attained skill or capability (Deci & Ryan, 2004).

According to Deci and Ryan (2008), psychological relatedness involves the innate desire to connect, interact, and experience others through meaningful relationships. This, ultimately, creates a sense of belonging and attachment. Relatedness, too, is responsible for boosts in intrinsic motivations, which plays into the emotional attachment notion and desired feeling of community between alumni and their alma mater. Since each individual experiences motivation differently, Deci and Ryan (1985) distinguished between two types of motivation, intrinsic and extrinsic. When someone is motivated by intrinsic factors, such as enjoyment or the desire to achieve a particular goal, they tend to work harder than normally to reach their objectives. According to Ryan and Deci (2000), extrinsic motivation is the process of performing a task in the hopes of receiving some sort of external reward, such as money or peer approval. As a result, depending on the source of their motivations, individuals might find themselves either more or less motivated to achieve.

To build on Deci and Ryan's theory, the concept of *triggers* as described by Van Slyke and Brooks (2005) provides another approach in comprehending donor behavior and what prompts individuals to make charitable gifts. These triggers represent external factors initiated by organizations to translate donor motivations into desired behaviors, such as donating or volunteering. Van Slyke and Brooks (2005) identified three key triggers:

1. **Being Asked:** The act of directly soliciting a donation or volunteer commitment is a significant trigger. Many donors are more likely to give when they are personally asked or approached by an organization or a representative. Personalized requests can tap into individuals' motivations and willingness to contribute.
2. **The Availability of Tax Benefits:** Tax incentives and benefits, such as deductions for charitable contributions, can serve as triggers for giving. Donors might be more

inclined to give when they understand the financial advantages of making a charitable contribution, as it can reduce their tax liability.

3. A Sense of Duty: Some donors are motivated by a sense of moral or social obligation to support causes and organizations. This sense of duty or responsibility to make a positive effect on society can trigger charitable giving.

These motivators offer another example of who gives, why they give, and what might encourage them to give more. By recognizing and leveraging these triggers, institutions can tailor their fundraising efforts to align with donor motivations. Moreover, alumni could be influenced by a range of motivations for giving back, including personal values, beliefs, ideas, and goals (Drezner, 2011). This motivational diversity underscores the complexity of philanthropic giving and suggests that the reasons behind alumni giving may be multidimensional and vary from individual to individual.

Scholars have recognized changes in donors' behaviors toward the organization they support. This is especially true for major donors, who might be concerned about the long-term implications of a gift of capital magnitude (Pickett, 1986). In terms of changes in donor behavior, Strickland (2007) found that contemporary donors are more interested in cultivating change and having a transformative impact on institutions to which they donate. As noted by Pickett (1986), major donors, especially those making substantial gifts, may be increasingly concerned about the long-term implications of their contributions and may want to ensure that their donations have a lasting and positive. This concern for the sustainability and effectiveness of their gifts can influence their behavior and the way they engage with the organizations. Strickland (2007) aligns with Pickett (1986) and highlights a significant shift in the expectations of today's major philanthropists compared to historical donors. Modern major philanthropists often seek a more

active and involved role in the institutions they support. They may not only provide financial support but also desire to influence the strategic direction, programs, and policies of the organizations they back. This increased level of involvement can have profound implications for how institutions interact with their major donors.

These observations reflect the evolving nature of philanthropy and major giving. Donors, particularly major donors, are becoming more strategic, engaged, and impact-focused in their approach to giving. They often view their donations as investments and want to see measurable results and long-term sustainability. Furthermore, they may bring their expertise, experience, and networks to bear on the organizations they support, potentially influencing the direction and operation of these institutions. This shift emphasizes the need for nonprofits to adapt their fundraising and stewardship strategies to accommodate these changing donor behaviors and expectations.

Individual Characteristics

Age and Income

According to Skari (2014), age, income, and the number of years since graduation strongly associate with alumni giving. Philanthropic capacity typically increases with age, as older alumni offer more robust financial resources than younger alumni (Wang & Ashcraft, 2014). Skari (2014) reported that alumni earning income greater than \$60,000 demonstrate higher giving levels, while Mesch et al. (2006) noted that alumni donated \$295 more for each additional \$20,000 in income.

Aspects of age and high-net-worth donors were also studied (Tempel, 2011). The authors referred to the Baby Boomers as "the largest and wealthiest economic force" (p. 173) and noted that "boomers are predicted to control nearly 60% of the country's net wealth" by 2015 (p. 173).

Tempel (2011) also argued that fundraising initiatives targeted at high-net-worth donors should be "donor-centric" (p. 173) and consider three likely characteristics of this donor segment: the inclination to give as a family, the involvement of a financial advisor, and the upholding high expectations for the organization to which they donate. The authors offered advice for inspiring high-net-worth donors that aligned with components of the fundraising cycles, including identifying potential donors, assessing affinity and interests, and engaging in meaningful rapport, and evaluating options for giving, like annual, major, planned, or campaign giving (Tempel, 2011).

Gender

According to Dvorak and Toubman (2012), gender identifies as an important factor on both the donation amount and cadence. Men usually donate larger gifts less often and women typically give smaller gifts more frequently (Dvorak & Toubman, 2012). In other words, men will make a single large donation at a specific time and women will make more modest donations on an ongoing basis, allowing them to remain continually engaged with their institution between gifts.

Drezner (2011) observed a similar pattern in charitable giving that suggests that women tend to make smaller donations more frequently, while men tend to make larger, less frequent donations. In other words, women are more likely to give smaller amounts of money regularly, while men are more inclined to give larger sums of money on a less frequent basis. Drezner (2011) also points out that understanding female donor behavior is becoming increasingly important. This is because women's influence and power in philanthropy and the broader economy are on the rise. As women gain more economic and financial independence, their role in charitable giving and decision-making becomes more significant (Drezner, 2011).

Understanding their giving preferences and motivations is crucial for institutions and development officers looking to engage with and cater to this growing demographic.

Despite the conventional perception of philanthropists as white men, women are becoming a more substantial proportion of the donor pool, according to Drezner (2011). Historically, women have contributed money to start women's schools and handmade goods to support higher education (Drezner, 2011). The author noted that several factors that contribute to the growing role of women in philanthropy, including their greater earning potential, longer lifespan than men, and the transfer of wealth. Additionally, women volunteer at a higher rate than men do and that they also typically donate financially to the organizations where they serve and volunteer, because they are building a relationship with the organization. The author stressed how crucial this information becomes for a development officer in creating strategies and touch points aimed at cultivating female donors.

Marital Status

Beyond age, income, geography, and gender, Monks (2003) also found that marital status is a predictor of philanthropy, as single alumni gave larger donations than their married counterparts. Based on research by Yoruk (2010), the dynamic between spouses plays into philanthropy, noting that “households where both spouses decided jointly on charitable giving increased household giving by 7%” (p. 509).

Drezner’s (2011) research also extended to the dynamics of giving within married couples, specifically looking at the role of decision-makers in charitable contributions. The key finding is that when women take the lead in making decisions about charitable giving within a married couple, education tends to receive more support compared to when men are the primary decision-makers. The author implied that there might be a difference in the priorities and

preferences of men and women when it comes to philanthropic decisions within a marital context. In cases where women are the decision-makers, there appears to be a greater inclination to support educational causes. This could reflect a range of factors, including the personal interests and values of the women involved or their perception of the importance of education.

Financial Aid

Some researchers have examined the connection between financial aid and philanthropy (McDearmon & Shirley, 2009; Weerts & Ronca, 2007). Monks (2003) found that taking student loans negatively correlated with philanthropy but receiving need-based grants increased the likelihood of alumni giving. Similarly, McDearmon and Shirley (2009) posited that loans were not indicative of future donations but alumni who graduated without loans made future gifts. Therefore, undergraduate need-based assistance influences the proclivity for alumni donations, as students who financed their education with student loans are less likely to give back as alumni, compared to recipients of scholarships or grants.

Marr et al. (2005) analyzed data from 2,822 individuals who completed their studies at Vanderbilt University between 1988 and 1990. The university's development office provided detailed information on the giving behavior of these participants, including donation amounts, dates, specific fund designations, and other relevant details. The researchers focused on different types of financial aid variables such as need-based scholarships, merit-based scholarships, and need-based loans. The findings suggested that individuals who received any form of need-based loan during their undergraduate years displayed a decreased likelihood (ranging from 8–16%) to donate within 8 years after graduation from the institution (Marr et al., 2005). In contrast, those who were recipients of need-based scholarships showed an increased probability (ranging from 5–13%) of making donations post-graduation (Marr et al., 2005).

Summary

The literature suggests that age, income, geography, gender, marital status, generational differences, and financial aid play a significant role in shaping graduates' decisions about donating to their alma mater. Understanding these alumni characteristics can guide higher education institutions in tailoring their development efforts and engagement strategies. For example, institutions may design targeted appeals or events that align with the preferences and affinities of specific alumni groups, based on educational level, marital status, and geographical location in proximity to campus. Though building a strong alumni community and fostering an overall sense of pride, tradition, and loyalty can be effective in encouraging alumni to philanthropically support their alma mater, demographics play an important factor in determining whether alumni donors want to give back.

CHAPTER 3

METHODS

The research took place at Valley School (pseudonym), a private graduate school, and employed a phenomenological approach to examine the lived experiences of alumni donors who made gifts of \$10,000 or more since graduation. This case study was designed to provide a deeper understanding of alumni donor motivations, their decision-making processes regarding gifts, and their overall interactions with the institution within the context of a private graduate school. A more comprehensive view of the lived experiences from the donors' perspectives has the potential to enhance the efficacy of future fundraising efforts aimed at addressing critical funding needs in higher education institutions. Moreover, my findings emphasized the importance of further research in the field of fundraising, particularly at the graduate school level.

Phenomenology is the approach that best aligned with the purpose of this research on graduate school alumni donors, as the methodology enabled the participants to share the rich and multifaceted details of their lived experience in the phenomenon of philanthropy. Creswell and Creswell (2018) asserted that phenomenological research “describes the common meaning for several individuals of their lived experience of a concept or phenomenon” (p. 76). According to Merriam and Tisdale (2016), “basic research is motivated by an intellectual interest in a phenomenon and has as its goal the extension of knowledge. Although basic research may eventually inform practice, its primary purpose is to know more about a phenomenon” (p. 3).

Participants

The participants in this case study consisted of Valley School alumni who have donated \$10,000 or more since graduation. Non-alumni donors were excluded from the research. Providing an amplified voice to participants encouraged alumni to share their stories and personal experiences while offering insight into their attitudes, feelings, beliefs, and perspectives relating to their engagement and philanthropy. To identify potential participants and make meaning from their lived experiences, purposive sampling was applied.

Purposeful sampling is common in qualitative research because the approach provides the researcher with participants who will best aid the researcher in understanding the problem and the research question (Creswell & Creswell, 2018). Maxwell (2005) defined purposive sampling as a "strategy in which particular settings, persons, or events are selected deliberately in order to provide important information that cannot be gotten as well from other choices" (p. 88). In fact, Seidman (2013) noted that "true randomness would be prohibitive in an in-depth interview study" (p. 55). Though purposive sample is non-random and less generalizable, engaging a specific population of Valley School alumni increased the quality of the findings, uncovered deep layers of meaning, and ensured that the research closely reflected the participants' lived experiences.

Criteria for the selection of participants included Valley School alumni status, a representation from a variety of career paths, and a philanthropic giving history of \$10,000 or more. The study identified potential participants who fell within the pre-determined criteria and cordially invited each of them to voluntarily participate in the research. Through individual interviews, this case study was designed to provide a deeper understanding of alumni donor

motivations, their decision-making processes regarding gifts, and their overall interactions with the institution by collecting rich, meaningful responses about their giving experiences.

The first step in my purposive sampling included sorting a current Valley School fundraising portfolio of 105 alumni donors by lifetime giving totals, then identifying prospective participants who fit the selection parameters, which included alumni status, a representation from a variety of career paths, and a philanthropic giving history of \$10,000 or more. From a pared down pool of 60, I grouped 20 donors that met the selection criteria, with the intention of interviewing 8-10. The segmentation was based on the alumni donor's total gift amount, gift designation, gift date, past giving patterns, and graduation year. When selecting prospective participants, I assessed their overall giving amounts and invite alumni donors who had given at varied levels within the established \$10,000 or more lifetime giving criteria. Additionally, I also considered their chosen gift designations to obtain insight from donors with diverse interests in distinctive aspects of Valley School, including annual, capital, major, and campaign giving or gifts to advance academic disciplines, such as restricted donations to particular departments, professorships, or student life. Originally, I intended to include race, gender, and marital status as selection categories but due to the homogeneity of the narrowed down portfolio, my criteria surrounded only alumni status, varied career paths, and a giving history of \$10,000 or more. Table 1 outlines the segmented portfolio breakdown of alumni donors by graduation decade.

Table 1

Ranges of Potential Participants by Graduation Decade

Year	Alumni Donors
2020-Present	1
2010-2019	2
2000-2009	5
1990-1999	12
1980-1989	16
1970-1979	20
1960-1969	3
1950-1959	1

According to Jones et al. (2013), “there often is, and should be, a relationship between the researcher and the researched” (p. 6). Because of my relationship with Valley School, connectivity to their undergraduate and graduate school alumni, and experience as a development officer in both educational and health-related nonprofits, I felt confident in my ability to secure 8 potential participants and ask meaningful questions that shed light on their philanthropic perceptions, motivations, and satisfaction levels. However, it is important to note that each of these alumni donors gave their gifts to Valley School through another development officer and presiding Dean. I was not a part of cultivating, soliciting, or stewarding any of the eight participants who shared their lived experiences for this case study.

Data Sources

Marshall and Rossman (1999) suggested that if the phenomenon includes an "individual lived experience," the best strategy involves in-depth interviews, noting "the goal is to capture

the deep meaning of experience in their own words" (p. 61). As appropriate in a phenomenological study, the data source consisted of a 60-minute in-depth interview with participants who meet the selection criteria.

Interviews

Alumni were invited to participate in an individual interview to better understand their lived experiences as an alum and donor to Valley School. Participants were asked to share personal stories, anecdotes from the past, and outlooks for the future in a forthcoming, transparent manner. The interview prompts consisted of descriptive, semi-structured, and open-ended questions to elicit authentic reactions from the participants. The interview protocol aligned with the elements of the social exchange and self-determination theories to explore participants' intrinsic and extrinsic motivation to give and the role social connection and belonging plays in the motivation to give. For each round of pre-determined questions, I guided the participants to share their honest thoughts and adapted the follow-up questions when the participant mentioned phrases that unearthed a new dimension of the phenomenon (Esterberg, 2002). As Esterberg (2002) noted, "the interviewee's responses shape the order and structure of the interview" and the interviewer "needs to listen carefully to the participant's responses and follow his or her lead" (p. 87). Member checking was used both during and after the individual interviews to ensure accuracy and to clarify any responses.

Data Collection

Before contacting potential participants and inviting them to join the study, I received approval from William & Mary's Institutional Review Board (IRB). Initial participant outreach occurred by email (Appendix A). To foster authenticity and good faith between myself and potential participants, I followed Marshall and Rossman's (2011) suggestion of building trust

and respecting both of reciprocity and sensitivity with the participants. As a measure to maintain confidentiality, pseudonyms replaced names throughout the study.

After initial contact with a potential participant, I scheduled a phone call to answer any questions about the study, share additional information, and confirm the meeting of selection criteria. I attached the Informed Consent Statement (Appendix B) to the e-mail invitation, which outlined further details about the research, and asked alumni to review the statement prior to agreeing to join the study. The consent procedure was implemented in accordance with the recommendations of the William & Mary IRB Committee. When inviting alumni donors to participate in the research, I informed them that the study included one 60-minute in-depth interview (Appendix C), conducted virtually, by telephone, or in person, at a convenient location of the participants' choosing.

Data were collected using an audio recorder and field note documentation, as recommended by Creswell & Creswell (2018), with the informed consent of the participants. After each interview, the automated transcription was reviewed in its entirety and cross-checked by carefully listening to the recording and capturing not only the spoken words but also any significant pauses, laughter, and emotional expressions. The audio recordings and subsequent transcripts were saved to a secure, password-protected computer to which only I retain access. All identifying data was deleted after completion of the research study. To promote accuracy, I remained continually engaged with the collected data to confirm a factual representation and understanding of the participants' responses.

Data Analysis

Individual interviews provided the data source for this qualitative phenomenological case study. Observational notes and reflective journaling served as additional data points to gain

greater clarity into the lived experiences of alumni donors. I used thematic analysis, as outlined by Braun and Clarke (2006), to identify, describe, and interpret patterns in the qualitative data and derive meaningful insights from the participants' narratives. According to Braun and Clarke (2006), thematic analysis is a constant-comparative method that involves reading and rereading the interview transcripts in a systematic way to ensure that the essence of the phenomenon is accurately captured and presented in the findings. Common in qualitative research, constant-comparative analysis includes examining data for common themes then comparing the data with existing codes to determine patterns (Merriam & Tisdale, 2016). To maintain the necessary rigor in the analysis, this case study adopted the six-phase process as proposed by Braun and Clark (2006):

1. Familiarizing with the data.
2. Generating initial codes.
3. Searching for themes.
4. Reviewing the themes.
5. Defining and naming the themes.
6. Writing the report.

I upheld the notion that qualitative data analysis embodies an iterative and reflective process and requires constant moving back and forth between steps. To that end, I revisited and refined the coding process as I progressed through the analysis. Following each of the individual interviews, I read and reviewed my field notes numerous times and expounded upon the condensed notes written during the interview. Additionally, I used thematic memos to help organize and make sense of the data, as Marshall and Rossman (2011) suggested that thematic

memos provide a method for answering research questions and generating valuable insights into the phenomenon.

Merriam and Tisdale (2016) affirmed that data collection and analysis should concurrently take place during qualitative inquiry. To that end, I compared the transcribed interviews with my field notes throughout the data collection and analysis stage to develop a holistic understanding of the lived experiences and the values, attitudes, and beliefs expressed by participants. After rigorous data analysis, nine themes emerged and shed light on the answers to the following research questions:

RQ 1: How do alumni donors describe their motivation to give?

Both the in-depth interviews and artifacts provided a means to better understand the ways in which alumni donors feel motivated to donate to their graduate school alma mater. I coded Questions 1– 6 and 10–15 using a priori codes, followed by a second round of thematic analysis.

RQ 2: How do they explain their decision-making process when making a gift?

The interviews and artifacts will demonstrate the attributes and experiences that lead alumni to engage with and philanthropically support the institution. Questions 2, 3, 5–8, 10, and 15 were coded using a priori codes, followed by a second round of thematic analysis.

RQ 3: What interactions with the institution contributed to their willingness to donate?

The interviews and artifacts showcased the institutional influences that cultivated a strong relationship with alumni donors and contribute to their decision to give. Questions 2– 4, 6–10, 13, and 15 were coded using a priori codes, followed by a second round of thematic analysis.

Table 2 outlines the data source and analysis for each research question.

Table 2*Research Questions and Data*

Research Question	Data Source	Data Analysis	Interview Prompts	A Priori Codes
What factors do alumni donors use to describe their motivation to give?	In-depth Interviews	A Priori Coding, Thematic Analysis	1, 2, 3, 4, 5, 6, 10, 11, 12, 13, 14, 15	Belonging Giving Back Appreciation
How do they explain their decision-making process when making a gift?	In-depth Interviews	A Priori Coding, Thematic Analysis	2, 3, 5, 6, 7, 8, 10, 15	Satisfaction Engagement Trust
What interactions with the institution contributed to their willingness to donate?	In-depth Interviews	A Priori Coding, Thematic Analysis	2, 3, 4, 6, 7, 8, 9, 10, 13, 15	Events Students Staff

Delimitations, Limitations, Assumptions***Delimitations***

The case study excluded non-alumni donors and lifetime giving under \$10,000. The study was also delimited by the small sample size and the nature of the phenomenological approach, which is purely qualitative and highly subjective.

Limitations

The close professional proximity of my role as one Valley School's development officers required acknowledgement and continued monitoring to remove any unintended bias. Given the small sample size and my use of purposive sampling, the generalizability of my findings will be limited. The results are less likely to apply to other contexts, yet my findings will paint a picture and tell a story that may prove useful to other researchers and development officers in private graduate schools.

Additionally, a potential response bias among participants may have existed, as those alumni donors who feel connected to Valley School may have been more likely to respond to the invitation to participate in the study versus those alumni donors who do not feel as strongly engaged with the institution.

Assumptions

The case study assumed that participants offered authentic and honest responses and felt collaborative in helping to better understand the lived experiences of Valley School alumni donors. I also assumed that I would learn from listening to how alumni donors represented their motivations to give, enabling me to design better cultivation, solicitation, and stewardship touchpoints and build longer lasting donor relationships.

Positionality Statement

As one of the development officers for Valley School, I served as the researcher and consider Valley School's alumni as our greatest human capital asset. I listened intently, member checked to explore accuracy, and cultivated an open, responsive environment to explicate the results and remove any unintended bias from entering the recommended future interventions. To reduce preconceptions or partiality in my analysis, I engaged in reflexive journaling to acknowledge and consider my personal views of philanthropy and its impact on my work.

Ethical Considerations

Participation in the case study was voluntary. Given the small sample size, I took extra precautions to maintain confidentiality and used pseudonyms for each participant. All recordings, notes, and fundraising benchmarks removed any personally identifiable information. To ensure quality, reliable, and trustworthy results, I enlisted member checking to test credibility

and provide participant validation by sharing the outcomes and encouraging participants to review for accuracy (Creswell & Creswell, 2018).

CHAPTER 4

FINDINGS

Understanding what motivates donors to engage in philanthropy with their graduate school alma mater offers a glimpse into how institutions can build long-lasting relationships with their alumni. This chapter details the findings of the phenomenological case study, which were considered through the lens of the social exchange (Drezner, 2011) and self-determination theories (Deci & Ryan, 1985) and guided by the following research questions:

1. What factors do alumni donors use to describe their motivation to give?
2. How do they explain their decision-making process when making a gift?
3. Which interactions with the institution contributed to their willingness to donate?

Results were categorized into three main groupings that reflect the lived experiences of alumni donors: the motivation behind *why* they engage and give philanthropically (RQ 1), insights into *how* they make the decision to donate (RQ 2), and reflections on *who* or *what* within the institution inspires the engagement and support (RQ 3). Excerpts from participant interviews underpinned the main categories and their respective major themes. The interconnection between groupings was demonstrated through the repetition of certain major themes across multiple categories. Often, identical excerpts were applied to reinforce various themes.

Participants

Of the 20 alumni donors that met the selection criteria, the eight participants in the case study included five men and three women and spanned eight decades of graduation years, from 1950-Present. All eight held Valley School alumni status, represented a variety of career paths,

and maintained a philanthropic giving history of \$10,000 or more. Lifetime giving ranged from \$10,000 to \$1,000,000 and five of the eight participants had given a major gift to Valley School between \$100,000 and \$1,000,000. Additionally, each of the participants gave their gifts to Valley School through another development officer and presiding Dean. I was not a part of cultivating, soliciting, or stewarding any of the eight participants who shared their lived experiences for this case study.

Whether virtually, by telephone, or in person, participants were interviewed at a convenient location of their choosing. Five of the alumni donors chose to interview in their homes, two conversations took place at coffee shops, and one over lunch in a restaurant near their office. Interview times ranged from 42–127 minutes and each participant illustrated a genuine excitement, dedication, and willingness to contribute to the research process. The donors appeared thoroughly invested in not only answering the questions and sharing their lived experiences but also by offering takeaways, insights, and suggested improvements to the fundraising cycle and institutional philanthropic process. Table 3 outlines the partial biographical data for each participant.

Table 3

Participant Biographical Data

Participant ID (Pseudonym)	Graduation Year
1 (Ainsley)	2020-Present
2 (Beau)	2010-2019
3 (Royce)	2000-2009
4 (Graham)	1990-1999
5 (Pierce)	1980-1989
6 (Harper)	1970-1979
7 (Sloane)	1960-1969
8 (Brooks)	1950-1959

Because this case study involved participants from a particular and restricted donor pool of alumni, many stories share an intentional brevity to protect anonymity. My greatest promise involved honoring the commitment made to participants in safeguarding their identity while honestly and candidly sharing their personal and lived experiences as alumni donors of Valley School. To that end, analytic memoing was prioritized to convey alumni donor impact, create a sense of intimacy, and capture raw emotions without compromising the inherent trust and regard for participant confidentiality. I jotted down my observations, feelings, and initial reactions through the memos to record my thoughts, which developed and grew throughout the case study, and provided a crucial piece of observational evidence on alumni donor experiences, narratives, and perspectives.

Coding

After transcribing each interview, I holistically read through the responses to understand the depth of the data and gleaned an overall sense of the pervading ideas, concepts, and themes

(Creswell & Creswell, 2018). Then, I re-read the transcripts and began generating connections between the donors' student experiences, their alumni experiences, and their interactions with Valley School that ultimately motivated their giving.

The first round of coding involved searching for the a priori codes (belonging, giving back, appreciation, satisfaction, engagement, trust, events, students, and staff) in the interview transcripts, in addition to terms and expressions that closely related to each code. For example, I searched for words and phrases like "loved my student experience" or "happy with my time at Valley School" to recognize when a participant began talking about satisfaction or "attachment" in conjunction with the a priori code, *belonging*. I counted each of the times an a priori code was mentioned throughout the conversation. The second round of coding involved analyzing the transcripts for emergent codes during the interviews. Table 4 illustrates the counts for each a priori and emergent code, with an asterisk indicating non a priori codes that emerged throughout the coding process.

Table 4*A Priori and Emergent Code Counts*

Code	<i>f</i>
Appreciation	20
Belonging	14
Engagement	10
Events	8
Giving Back	18
Mentors*	16
Rigor*	8
Satisfaction	15
Scholarships*	7
Staff	12
Students	13
Trust	8
Total	149

* emergent code

Code counts were recorded to measure the frequency of the a priori and emergent codes. The frequency count was then used to inform the consistent themes that emerged during the in-depth interviews. The following analytic memo highlights the unwavering thread throughout the case study:

The ability to feel genuinely engaged with Valley School clearly engenders a sense of belonging. All eight participants reflected on their feelings of appreciation and connectedness contributed to their relational feelings of rapport, and even friendship, with their alma mater. From the small gesture of the Dean reaching out to wish them a happy birthday or the development officer inviting them to join a class as a guest speaker,

both efforts were viewed in a positive, meaningful, and personal light by alumni. When I asked a follow up question to better understand which type of outreach meant more, one participant noted, “When you feel like you belong and you’re a part of the community, you can’t really compare one against the other. They all matter and mean something.”

The findings of the case study emerged through data analysis, analytic memoing and member checking, and were then sorted into three categories: the *why* (RQ 1), the *how* (RQ 2), and the *who* and *what* (RQ 3). I reported findings across participants by identifying patterns within themes that answered each research question and applied direct quotes to substantiate the findings and amplify the alumni donors’ lived experiences and voices. Table 5 outlines the interview prompts and their alignment with each research question.

Table 5*List of Interview Prompts Related to Research Questions*

Item	Prompt	Research Question
1	Why did you choose to attend Valley School? Did any aspect of the institution (e.g., academics, research, rankings, employment outcomes, location) play a role in your decision to enroll?	1
2	Do any professors, staff members, or events stand out as memorable from your student experience?	1, 2, 3
3	Tell me about your experience since graduation. Have you felt connected to and engaged with Valley School as an alum? Can you think of a specific person or experience that motivated your ongoing relationship as an alum with Valley School?	1, 2, 3
4	Can you describe a time that you felt the most connected to Valley School?	1, 3
5	In what ways do you support the Valley School? Have you attended any on-campus events? Have you assisted current students with mentorship, internship, and career opportunities?	1, 2
6	Do any particular people or experiences come to mind that motivated you to philanthropically give back to Valley School?	1, 2, 3
7	What factors influenced where (designation) and what (amount) you wanted to give?	2, 3
8	Did you approach Valley School regarding giving or did someone from the institution approach you? Did you interact with development officers, the Dean, faculty, or other staff members as part of your giving process? If so, how would you describe those interactions?	2, 3
9	How would you describe your overall giving experience?	3
10	Do you have any suggestions on how Valley School can improve the donor giving experience?	1, 2, 3
11	Alumni donors give for a myriad of different reasons. Reflecting on your past giving to Valley School, how would you best describe your motivation to give?	1
12	Thinking about your gift(s), could you share any characteristics you personally uphold that may have motivated you to give?	1
13	From Valley School people and experiences to your own personal characteristics, what do you ascribe as the <i>most</i> important motivator in your giving as an alum?	1, 3
14	Do you support your undergraduate alma mater or any other nonprofit organizations?	1
15	Is there anything else you would like to share that is important to you?	1, 2, 3

RQ 1: What factors do alumni donors use to describe their motivation to give?

Giving is complex, as are the reasons why donors choose to give, what motivates them, and what information they need in advance of contributing to their alma mater. Interview

prompts 1– 6 and 10–15 contributed to answering RQ 1. The three a priori codes (*belonging*, *giving back*, and *appreciation*) underpinned the three emergent themes, including feelings of (a) a strong sense of community and belonging, (b) a responsibility for giving back and paying forward scholarships received as students, and (c) fulfillment in and thankfulness for their education. Table 6 outlines the emergent themes and frequency as related to RQ 1.

Table 6

Emergent Themes and Frequency for Research Question 1

Theme	<i>f</i> (n = 8)
Strong sense of community and belonging	8
Responsibility for giving back and paying forward scholarships	7
Fulfillment in and thankfulness for their education	8

Strong Sense of Community and Belonging

Drawing on the rich data collected from the alumni donors’ own words, I discerned several themes regarding their lived experiences as graduates of and donors to Valley School. The most pronounced *why* behind their motivation to give centered on their positive reflections as graduate students and their sense of belonging within the Valley School community. When asked about their time as a student, all eight participants noted how much they enjoyed their graduate studies, citing classmates, professors, and the vibrancy a supportive, non-competitive student culture that made their experience both memorable and meaningful. Through probing more about memories, stories, and overall feelings during their graduate school years, five

participants, spanning across the graduation ranges, cited Valley School as one of their best life choices.

Ainsley

Ainsley (2020-Present) said:

I couldn't have asked for a better place to go to graduate school. My time on campus was one of my favorite memories. My classmates were the best, my professors were great teachers and made me feel like they cared about me as an individual. I felt like I was more than a grade. They wanted to know about my life, my aspirations, and how they could be a part of helping me reach my goals. I knew that I belonged on my first day of classes and I haven't ever stopped feeling that way.

Beau

Beau (2010-2019) reflected:

The culture was the best part of Valley School. I spent a lot of my undergraduate years feeling like an outsider. I just didn't fit in. I was worried about that happening again in graduate school but during our orientation week, I remember thinking to myself, 'This experience is already so different and it's only the third day.' Classes hadn't even started and I already felt like I belonged to a community who would support each other and persevere through a demanding and rigorous program together. I had found my people.

Royce

Royce (2000-2009) commented:

Valley School is an amazing place. I spent my undergraduate years there, too, and I have no regrets on either decision for my education. Our campus community is so interwoven and connected to this day, even as alumni. It sounds funny, I guess but there's something

special about the students who are led to study there. It's serendipity in a way because we're all meant to be here together, so we all already belong to the school, and to a degree, each other's lives. I met my best friends, my mentors, and my spouse at Valley School. It gave me so many pieces and parts of my life.

Graham

When asked about lifelong relationships built during graduate school, Graham (1990-1999) remarked:

Coming to Valley School was probably, no definitely, the best decision I ever made. I met my wife during the first week of classes, my best friend during the first semester, and forged a bond with my professor during the first month in her course. Maybe those things would have happened at another school but maybe not. There's this force field there where everyone just fits in somewhere and somehow. I remember describing Valley School to one of my colleagues at lunch one day. I said that everyone had a corner or a pocket of the school where they belonged. Everyone seemed to have found their place and their friends pretty quickly. Our professors made everyone feel that way because we were all valued for our pasts and supported for our futures. That feeling really permeated the air and the culture of Valley School.

Pierce

Pierce (1980-1989) echoed the same sentiment:

My wife had a totally different graduate school experience that I did. She went to school about an hour from of Valley School and it was not good. She just wanted to get out. Everyone was competitive and cutthroat. She ended up finishing in the top 10% of her class but maybe made one good friend the entire time. Completely the opposite of my

graduate experience. We all were in the journey together. We tried to help and lift each other up. Night and day from her experience. She doesn't give them a dime. I feel like I never give Valley School enough.

Harper

Similarly, Harper (1970-1979) responded:

Valley School is in my bones. My best friends came from my first semester study group. We were in the trenches together. You bond over things like that. I feel a part of this school to this day, even as an older alum. For example, last month, I drove over to campus on an idle Tuesday just to see what was happening. I walked through the front door and felt the buzz of students. I ran into the Dean, who recognized me from the reception the week before and talked to me for at least 10 minutes. I bet he was on his way to something important, and I probably made him late but he sure didn't make me feel that way. It's clear I belonged there 40 years ago as a student and it's clear I belong there now as a retired alum. That's pretty special, I'd say.

Sloane

Adding to the theme of a strong and connected community, when probed about what makes Valley School a special place, Sloane (1960-1969) quipped:

Do you have locks on the doors? I mean it! I come to pretty much every event because I want to see the Dean and hear from the professors and see the students. They look so young! It's funny, too, because sometimes, when you get older, you don't feel like you have the same value anymore. You're too young to understand this but when you're retired and you don't know social media or technology as well as the students do, it kind of makes you feel sad. Like, I have all this knowledge but who will care or listen? My

grandkids sure don't! But when I get invited back to campus and go to a class, I share war stories from my career and the kids ask me questions and seem interested. That means a lot to an old lady! The Valley School community is strong. Always has been.

Brooks

In thinking about his successful professional and personal life and reflecting on his humble upbringing, Brooks (1950-1959) said:

I lived the American dream. It started with Valley School. My class was small back then. 35 students. We stuck together like glue. Everybody tried to help each other. I come now and visit students and mentor four of them. They all have a promising future. They help each other the same way we did. Nothing has changed. It is the Valley School way.

Responsibility for Giving Back and Paying Forward

The second *why* influencing their motivation to give surrounded an overall proclivity to give back. When asked about which individual characteristics or perspectives motivated them to give, six of eight participants illustrated a personal conviction about philanthropy that grew from a younger age, sometimes modeled by their parents. Two participants shared how their feelings about giving blossomed later in life and took hold after their careers reached an apex. Seven participants received some level of scholarship funding during their time at Valley School, which played into their desire and dedication to help current students in the same way.

Ainsley

Ainsley (2020-Present) commented:

I received a generous scholarship to underwrite my graduate studies. Valley School is expensive and without this aid, my degree would not have been a reality. When my grandmother passed away last year, I wanted to honor her memory by making a donation.

I have never given that kind of money before! Never a gift with a comma in the amount! But it wasn't scary because it was for Valley School. She left me a little money behind and I paid off my loans and saved a portion to give to the school. She was so proud of me at graduation. She didn't go to college, so seeing me earning my graduate degree was very meaningful to her. It's the least I could have done to celebrate her life and the life that Valley School has given to me.

Beau

Beau (2010-2019) said:

Giving back was something we did as a family. My parents donated all the time to nonprofits, like animal shelters, medical research foundations, and our private K-12 schools. It's just a part of who they are. When we started talking about my own giving, I remember my mom sitting down with me and asking, 'What matters the most to you in this world? What made you who you are today?' Valley School was easily one of those answers. Giving back was a given.

Royce

Royce (2000-2009) noted:

Being generous was a tenet at Valley School. We watched fundraising events happen all the time. I saw first-hand how donations made a difference because they made a difference to me. I received a generous scholarship and that paved the way for my education and getting started in my career because I wasn't as burdened with high student loan payments.

Graham

Graham (1990-1999) echoed much of the same:

The love I feel for Valley School and how it has shaped my life drives all of my giving. I wouldn't be in the career or have the family I do without the school. You support what you love and care about with your check book, right? If you like cars, you spend your money on a cool car. If you like books, you buy a library full for your house. If you feel indebted to your education, you give back. You show up for your alma mater and you support the school who supported you. It's just that simple.

Pierce

Pierce (1980-1989) shared:

This goes back to my wife. As I said earlier, she didn't have a great experience in her graduate school, so her inclination to give back is nonexistent. That frees up our annual bucket of donations for my alma mater. She is more invested as a donor in Valley School because she knows how much it changed my life. It left an impact on me in so many ways. Isn't that the point of philanthropy? To make an impact? We feel like we do that with each gift.

Harper

Harper (1970-1979) responded:

It was never a question of whether I would give back or not. It was a matter of when. I received scholarship money as a student, which made a huge difference. Even back then, I knew that alumni loved the school and cared enough about Valley to donate money and make the school accessible for people like me who came from nothing. That scholarship meant everything. It was always on my heart and mind to give back when I could. There was no better feeling, other than having my children, that could compare to the way that I felt when I endowed my own scholarship at Valley School. I knew I was opening a door

for a student the way that another alum did for me in the 40 years ago. Still gives me goosebumps just talking about it!

Sloane

Sloane (1960-1969) remarked:

I never understand people who aren't givers. No one gets through life alone! We all get help from our friends – and sometimes, strangers! Giving back to Valley School was as natural as the rain. My time there shaped the rest of my life. Why would I not be generous to show my appreciation?

Brooks

Brooks (1950-1959) said:

Here's the thing. There's folks that give, there's folks that need to be asked to give, and there's folks that refuse to give. When I think about my life and all the success and notoriety that came from my career, that didn't come from me. Sure, I worked hard and sacrificed. But every opportunity I had started from my time at Valley School. People don't realize that. They think I did something special. I didn't. Nearly everything I learned about life came from my mentors and friends. People who don't give need to stop and think about what propelled their careers and who supported them when they were students. If they really sat down and thought about it, the answer would be Valley School.

Fulfillment in and Thankfulness for Their Education

Another *why* impacting their motivation to give stemmed from a resounding appreciation for Valley School, their educational experience, and their life after graduation. When asked about how their classmates and professors helped shape their reflections on Valley School, all eight participants expressed their fulfillment from, pride in, and gratitude for their alma mater. For

different participants, fulfillment came from different places. For some, their joy was pronounced when recalling memorable student stories and deep bonds with classmates. For others, by recounting their meaningful relationships with entrusted professors and mentors. For nearly all, their fulfillment surrounded their thankfulness for even choosing Valley School in the first place, their appreciation for all the good things, both professionally and personally, their alma mater brought to their lives, and their inherent, intrinsic desire to give back and help the next generation of Valley School students and young alumni. Each shared their personal satisfaction and enjoyment in embodying a Valley School alum, with Graham (1990-1999) noting, “For me and so many of my classmates, our past includes Valley School, our present includes Valley School, and our future includes Valley School.”

Ainsley

Ainsley (2020-Present) exclaimed:

Appreciation doesn't adequately cover how I feel about Valley School. I wear the sweatshirt, I have the license plate frame, I drink from coffee cup with the Valley School logo each morning. I pretty much own the bookstore! Feeling connected to the school like that makes you excited about making a gift and contributing. Giving and volunteering is how I show my gratitude for my degree and my experience. My appreciation Valley School is manifested when I carry my Valley School tote to work and see my name on the donor list. That gives me pride in myself and my school.

Beau

Beau (2010-2019) responded:

I appreciate everything my parents did for me growing up. I recognize my privilege. I get how my education was always a priority to them because they always invested so much

time and money in it. My undergraduate and Valley School were the same. I was lucky enough to come out of school with no debt. That doesn't fall short on me when I hear my friends talking about how their salaries are eaten up each month with their loan repayments. If I can use my privilege to help someone less fortunate by starting a scholarship, I think that's a great use. I am thankful to my parents for many things. They taught me to never lose sight of what's important.

Royce

Royce (2000-2009) noted:

I just appreciated everyone who helped me along the way. From scholarships to professors to mentors to classmates to alumni who hired me in two of my jobs. It's such a family at Valley School. Family sticks together and family supports each other. That means reading the magazine, going to events, giving money, and wearing the Valley School hat, you know? It means taking pride in your school.

Graham

Graham (1990-1999) said:

I'm always on the lookout for Valley School alumni to hire because I know what they're about from the start. You don't pick this place for the rankings or sunny weather or nice campus. You choose Valley School because of the people. The community. The ethics. The teamwork. I appreciate the professional skills I learned there. I appreciate the people skills I learned, too. They shaped my life just as much as my textbooks. I look back on my time with gratitude.

Pierce

Pierce (1980-1989) echoed:

I know I received a great education at Valley School. I want to support the school to keep up its reputation and help the students not feel so saddled with debt. It's crippling because not all jobs pay the big bucks, especially in the academic and public sectors. I appreciate those who came before me and paved the way. It's incumbent upon me to follow in their footsteps.

Harper

Harper (1970-1979) shared:

As an immigrant to this country, I have a deep appreciation for the American educational system. When I came to Valley School, I was one of a handful of women, let alone from the Middle East. The cost of graduate school is enormous and I appreciate the generosity I received as a student. I want to help and create a diverse student body and welcome students from other countries who may have never dreamed of a place like Valley School before. Our scholarship is one step in that direction.

Sloane

Sloane (1960-1969) remarked:

How can anyone not appreciate this place? They need a wake up call, because we had it so good. Most of the people around my table are friends from Valley School. We talk and talk about our professors and our classmates with such passion. It shaped all of us, it really did. I will always support the school.

Brooks

Brooks (1950-1959) said:

We are all called to serve others. My parents were uneducated but instilled in us the importance of giving of yourself for the greater good. Lessons like that do not leave you.

Once you get to a place in your life when you can help others in the same way you were helped with your education, you want to show your appreciation for that generosity. You want to leave that legacy. That is all you have left anyway when you are my age.

Summary of RQ 1

When asked about why they give to Valley School, three themes emerged. By far, all eight alumni donors demonstrated their motivation to give through the social exchange theory, noting their gratitude and feelings of indebtedness to their alma mater. Harper (1970-1979) remarked, “I owe Valley School a lot. I want to give back to basically pay them back for what they gave me as a student.” Brooks (1950-1959) shared:

When I think about my life, Valley School built my family, my friends, and my career.

That place has given me everything. Donating my money as a way of saying thanks is the right thing to do. Well, it’s the only thing to do.

Each of the eight participants echoed the importance of a positive student experience and how those feelings play into future engagement as both alumni and donors. Sloane (1960-1969) said, “For me and my friends, having fun as students transitioned into to having fun as alum. Those memories kept building over time.” Pierce (1980-1989) commented:

I loved my time at Valley School. Both undergrad and graduate school. My daughter grew up visiting me on campus between classes or before a study session. She knew she wanted to be a part of the Valley School family from a young age. Now, she’s in her sophomore year and loving every moment.

Seven participants shared their dedication and responsibility in paying forward the scholarship funding they received as students by making donations to Valley School and giving

back to current students. Brooks (1950-1959) said, “You pay it forward by giving back.” Royce (2000-2009) reflected:

I would not have been at Valley School without the generosity of people I had never met before. That scholarship changed my life and made graduate school possible without much debt. It only feels right to be that person for someone else now.

All participants cited their appreciation for their alma mater in the context of how Valley School changed the scope of their lives, both professionally and personally. Graham (1990-1999) shared, “I love God, I love my family, I love my friends, and I love Valley School.”

RQ 2: How do they explain their decision-making process when making a gift?

Based on the data, the *how* behind the decision-making process to give showcased several patterns among participants. Interview prompts 2, 3, 5–8, 10, and 15 contributed to answering RQ 2. The three a priori codes (*satisfaction*, *engagement*, and *trust*) underpinned the three emergent themes, including (a) being invited back to campus as an alum, (b) feeling meaningfully connected with the school and staff, and (c) having confidence in the impact of their gift. Table 7 outlines the emergent themes and frequency as related to RQ 2.

Table 7

Emergent Themes and Frequency for Research Question 2

Emergent Theme	No. (<i>n</i> = 8)
Being invited back to campus as an alum	8
Feeling meaningfully connected with the school and staff	8
Having confidence in the impact of their gift	5

Being Invited Back to Campus as an Alum

Building on the findings to RQ 1, all eight participants reinforced the notion that an engaged student experience goes hand in hand with an engaged alumni experience. Some described their *how* based on their level of fulfillment with their graduate degree, as measured through solid academic preparedness, strong faculty mentorship, and robust career opportunities. Others articulated their openness and willingness to accept the invitation to connect with Valley School as an alum, whether through attending a class reunion, taking a lunch meeting with the development officer, meeting the Dean, or speaking in a current class or on a panel. Additionally, when asked about their interactions and connectivity with Valley School over the years, all eight participants cited either the Dean, faculty members, the development officer, or other staff members as part of their satisfaction levels when deciding to donate.

Ainsley

Ainsley (2020-Present) noted:

I loved my student experience and wasn't sure how I would stay engaged after graduation. I focused on building my career and working long hours, so I declined most alumni events for the better part of the year. But then, I received an email from [the former development officer] asking me to come back to campus to talk to current students about my career and company. The rest is history! Now, I serve as a volunteer for one of our annual events and feel like I'm back in the fold of things. It's a gratifying feeling, especially as a recent graduate.

Beau

Beau (2010-2019) shared:

Initially, I reunited, if you will, with Valley School because I received a phone call from [the former development officer] inviting me to attend an alumni panel over lunch. I

hadn't visited campus since before the pandemic, so I was actually more eager to come back and see two of my favorite professors and not necessarily attend the panel. I asked [the former development officer] if they still taught at Valley School and if they would be there during the event. [The former development officer] said she would find out and get back to me, though I thought that was just part of her message and I admittedly doubted I'd hear back. To my surprise, less than four hours later, I heard back from [the former development officer]. She copied both professors on an email to me, confirming their attendance and noting how excited I would feel to see them. That won me over. I was shocked by [the former development officer's] response time and impressed by her follow through. I ended up coming to the panel, seeing them both, and scheduling a time to meet them for dinner. Since then, I have remained engaged and active.

Royce

Royce (2000-2009) said:

I got an email about meeting the new Dean. I remember [the former development officer]. She was warm and clearly knew a bit about me because she congratulated me on my recent promotion. I accepted the lunch invitation and had the chance to talk to the Dean. He blew me away. Really. Our conversation made me want to help Valley School any way that I could. I ended up agreeing to mentor a current student all because of that lunch.

Graham

Graham (1990-1999) described:

The biggest influence on my decision to give was how I felt when the school called me out of the blue. They wanted me to come to campus to talk to students about my career.

At first, I wasn't sure why. But [the former development officer] got me to agree and I had a great time. I knew that I made a difference because two students talked to me after my presentation and wanted to learn more. We started emailing back and forth and then I sort of became their unofficial mentor. It felt satisfying to give back to my school in that way.

Pierce

Pierce (1980-1989) commented:

I've been engaged with Valley School for a long time, so I'm happy with my relationship. It started with my class reunion and then grew to donating and serving on the advisory board. My daughter attends Valley School now as an undergrad, so she followed in my footsteps and is having the time of her life. We do engagement well from my vantage point. The staff care, they reach out, they stay connected, and keep on top of things. I don't think I've ever celebrated a birthday without a card or email from at least one person at the school.

Harper

Harper (1970-1979) shared:

I had little to no connection as an alum after graduation. As a first-generation student and immigrant, my sole focus was my career right away. I appreciated everything Valley School did for me, don't get me wrong but I just didn't have the time to attend events. It wasn't until I called the school to make my first donation that things changed. I left a voicemail on a general phone number asking about where I should give because I wanted to know where the money was needed the most. The gift was small, just \$1,000 but since I never gave back before, I at least wanted to designate the donation to an area of high

need. The [the former development officer] called me back within the day and we ended up setting up a Zoom. She asked me about my life, my experiences, and my family. I liked telling my story. That gift ended up going from \$1,000 to \$100,000, much to my husband's surprise!

Sloane

Sloane (1960-1969) stated:

I give because I have the money to give, and I like the people at the school. They invite me to events, meet me for tea, remember my birthday, and always seat me with my friends at reunion. A nice lady who used to work in fundraising used to put a handwritten note in the mail to say thank you for my donations. I was a loyal donor for years but only modest amounts. Those little things added up, though, and made me feel like my gift meant something and was appreciated. I ended up giving a portion of my estate to Valley School just a few years ago.

Brooks

Brooks (1950-1959) said:

I have given most of my investments away to Valley School. I designated my gifts to different things, like my endowed scholarship or money for the new building. My name is on a classroom or two, I think. I am happy with how I have been treated and thanked over the years. I spoke at Commencement one time and volunteered on the board for three years. The Dean takes me to lunch and sits next to me at events, which I like because I like hearing about the school and what is happening with our programs and our rankings. I had a good time as a student and a good time as an alum. I hope other people feel that way, too.

Feeling Meaningfully Connected With the School and Staff

The second *how* in the decision-making process including some form of engagement from the development officer and Dean. All eight participants detailed their cultivation and solicitation interactions and described their overall giving experience as fulfilling, happy, and meaningful. Four participants shared how much being thanked meant to them, while one participant cited that stewardship had little impact on their feelings or future giving. When asked about their interactions with the former development officer and Dean, six participants cited positive feelings for both and three participants noted their “heightened loyalty” as a result of the new Dean. When asked about how to improve the donor giving experience, three participants emphasized how mentoring current students augmented their feelings of engagement and connectedness with Valley School.

Ainsley

Ainsley (2020-Present) said:

I had lunch with [the former development officer] and she asked about my philanthropy. I was embarrassed to tell her that I had only given \$25 once to a charity. She made me feel comfortable again when she said, “It’s not what you give, it’s *that* you give.” I thought that was cool to hear from someone whose job it is to ask you for money. [The former development officer] told me about some ways I could give to Valley School and asked me to consider designating my gift to Student Services in honor of my late grandmother. That was an easy yes, because she knew how much Student Services made a difference to me as a student. She listened to me and remembered the little details.

Beau

Beau (2010-2019) shared:

The school reached out to me for that panel and then once I reconnected with my professors, [the former development officer] kept in touch with me. One time, she brought the new Dean along to coffee to share his vision for the school and our future. I liked the guy and though he had great ideas. She got me engaged as a mentor and I ended up hiring two students as my interns.

Royce

Royce (2000-2009) noted:

The biggest factor that influenced my decision to give was [the former development officer]. She came with three options to designate, I guess you call it, my gift. The first two I liked but the third one felt like the better choice. I knew that a lot of people gave money to help support scholarships, which obviously helps students by creating access to an expensive school but I wanted my money to go to the departmental program of my former professor. [The former development officer] had me meet with two students currently in the program and I heard how much the program impacted them. It felt like the right place to help and make a difference.

Graham

Graham (1990-1999) responded:

I interacted a lot with [the former development officer]. She met with me, and we talked for about an hour the first time. I told her about my time as a student and my career and family. She sent me a note in the mail, which was surprising, because no one really does that anymore. I received an electronic invitation to our upcoming class reunion and [the former development officer] sent me a personal email on top of that inviting me to join the party. It seemed like she cared, even though her goal was probably getting me to give

a donation. She didn't come across that way, though. [The former development officer] was genuine.

Pierce

Pierce (1980-1989) said:

That's a tough question. My first gift went to scholarships, my second gift went to the new building, and I can't remember where all the rest of the gifts went over the years. I have a plaque here and there around campus. But what I do remember is the follow up. I was thanked by 100 different people on 100 different days in 100 different ways! Valley School knows how to engage people and make them feel special. That's a fact. I would still give anyway without that fanfare. It feels nice to feel appreciated, though.

Harper

Harper (1970-1979) noted:

My gift moved quickly. I made that call about \$1,000 and talked with [the former development officer] over Zoom. She then scheduled a follow up conversation with her and the Dean at a restaurant near my office. So close I could walk! I like that [the former development officer] researched me a bit. I felt sort of important. We had a lovely visit and the Dean was remarkable. I honestly felt engaged from the day forward. It didn't stop after my gift, either, like I thought it might. The school is good at fundraising and engagement.

Sloane

Sloane (1960-1969) replied:

People call me from the school all the time! There's always some event or some celebration and I get invited. I think they like my company. Here's the funny thing. I like

their company, too. I remember one time I went to an event and my name tag still had my married name. I went through a bitter divorce, so the last thing I wanted to see was his name! I joked with [the former development officer] and said, “I need to get you to update my record next time because I’m no longer a [surname].” Sure enough, [the former development officer] said, “I’ll fix that right now. Give me 10 minutes.” I told her she didn’t have to, then I grabbed a glass of wine, and started talking to a friend. Before I knew, here she comes walking in her high heels with a new nametag. Now that’s customer service.

Brooks

Brooks (1950-1959) said:

I joined the committee that hired the Dean, so I know him well and we interact often. But I have seen a lot of fundraisers over the years. Mostly good, a few bad, and a handful that were outstanding. What makes them stand out is how they talk to you. They are authentic. They care. They make you feel like you are the only person in the room. They are not looking around trying to see who else walked in and who they can get to know next. They listen to what you have to say. It is easy to give to Valley School. An outstanding fundraiser is the cherry on top.

Having Confidence in the Impact of Their Philanthropy

Another *how* impacting their decision-making process stemmed from feelings of trust on behalf of the institution. When asked what factors influenced the designation and gift amount, three participants shared stories about how the former development officer walked them through the process, clarifying their questions on where to give and how to structure the donation. Six participants remarked on their confidence levels with the former development officer and the

overall giving experience when probed to describe the staff interactions that led to their gift.

When asked to reflect and provide suggestions on improving the donor giving experience, four participants noted the significance of having a strong relationship the development officer and other key members of the leadership team.

Ainsley

Ainsley (2020-Present) commented:

I wanted to know how to best help the school. When I finally made the decision to give after my grandmother's passing, I felt like I built a good relationship with [the former development officer] and could call her to ask about Valley School's top priorities. We met in person and our talk gave me confidence that my donation would drive change for the students.

Beau

Beau (2010-2019) shared:

I had no idea where to give, just that I wanted to. Do you give to the general fund? Do you give to a scholarship fund that's already been established? Do you give to a program or a student group? I really needed educated on where and what to give. [The former development officer] showed me my options and I decided on the one that stood out the most for me.

Royce

Royce (2000-2009) noted:

Since I didn't give to support a scholarship, I wanted to sit down and talk with the professor about his goals for his program and where my donation could help, or maybe even close, the gap. [The former development officer] set up a meeting with the three of

us and answered some of the technical questions that came up in our conversation. She drew up a gift agreement that week and I signed on the dotted line. My interest was there because of my former professor but my trust was there because of [the former development officer].

Graham

Graham (1990-1999) responded:

Looking back, the communication was impressive. From the first hour long conversation to each follow up email and phone call, I always felt Valley School was responsive and thoughtful. It took a while for me to consider making the gift but when [the former Dean] and [the former development officer] showed me the potential impact and I thought about my interactions with them, I was confident that I was making the right choice with my hard-earned money.

Pierce

Pierce (1980-1989) said:

Valley School has a well-oiled fundraising wheel. We hired smart, kind people who get the Valley School spirit. They know you can't just call people up and ask them for a donation. You must engage them first and build a good rapport. Once you have that established, you can start thinking about the next step in the process of asking them to make a gift that holds meaning for them. That full cycle doesn't happen in 3 months.

Harper

Harper (1970-1979) noted:

Let's just say if you increase your original gift from \$1,000 to \$100,000, that's because someone took the time to explain and demystify the endowment process. [The former

development officer] had an organized approach. She knew her stuff inside and out. Once I got to the point of wanting to give, the actual technical side was straightforward and clear cut.

Sloane

Sloane (1960-1969) replied:

I have no complaints. I met with [the former development officer] for coffee, she listened to my interests, and we had a nice chat. I then went to an event on campus, a reception, I think, and she introduced me to the Dean. She set up a lunch for the three of us later that month and they asked me to consider endowing a scholarship. I get to meet the award recipient each year at the luncheon. It's special to get to know the student. Come to think of it, I haven't given since that initial gift but I would... and I probably should.

Brooks

Brooks (1950-1959) said:

Trust is critical. Being thanked is critical. Having a relationship with the Dean and fundraiser is critical. The leadership needs to keep you engaged after you donate. They cannot just take the gift and run. That will turn donors off and destroy the trust. I do not worry about that at Valley School but that is my advice for a new development officer.

Summary of RQ 2

When asked about *how* they decide to give to Valley School, three themes emerged from the interview data. Nearly all participants reiterated how reconnecting with their alma mater drove their engagement and philanthropy. Beau (2010-2019) remarked, "Mentoring paved the way for my donation. Getting to know those students made the impact of my gift feel tangible, even if they weren't the direct recipients." Ainsley (2020-Present) added:

As a recent graduate, I see how the seed has been planted. I say that because I'm all in now as an alum and many of my classmates and friends haven't yet gotten involved. It makes me want to help Valley School build a relationship with them because I think it might be tougher to develop that level of commitment later in life if you haven't been engaged from the start, you know?

All eight participants expressed feeling meaningfully connected with Valley School staff and *how* the development officer, most notably, created a runway for their engagement with their alma mater. In response to the question surrounding which interactions influenced their decision to give, Graham (1990-1999) noted, "Surprisingly, I'd say the fundraiser. That used to sound like the worst job in the world to me but when I saw [the former development officer] in action, I rethought my opinion. She seemed like she loved this work." When asked for clarification on his "well-oiled fundraising wheel" phrase, Pierce (1980-1989) explained:

If I venture a guess, most fundraisers transition into this career after success in another industry. What makes a good development officer is how they relate to other humans, how they listen, how they follow up, and how they show their passion and excitement for their work and for Valley School.

Six participants spoke of their feelings of trust and confidence with the Dean and former development officer. Descriptors such as open and honest communication, reliability, consistency, authenticity, and genuine care and compassion were mentioned. Beau (2010-2019) shared, "The school's goal is to ensure a donor has a belief in your vision, trust in your leadership, and the confidence you will use their donation responsibly."

RQ 3: Which interactions with the institution contributed to their willingness to donate?

Based on the data, the *who* and *what* that inspires their engagement and philanthropic support includes their experiences with mentors and professors, their time spent mentoring and engaging with current students, and their interactions with the Dean and development officer. Interview prompts 2–4, 6–10, 13, and 15 contributed to answering RQ 3. The three a priori codes (events, students, and staff) underpinned the two emergent themes, including (a) maintaining a relationship with professors and advisors, and (b) helping current students with mentorship and career placement. Table 8 outlines the emergent themes and frequency as related to RQ 3.

Table 8

Emergent Themes and Frequency for Research Question 3

Emergent Theme	No. (<i>n</i> = 8)
Maintaining a relationship with professors and mentors	5
Helping current students with mentorship and career placement	7

Maintaining a Relationship With Professors and Leadership

The first *who* and *what* that inspire philanthropy were identified by five participants as their former professors and faculty mentors. When asked about specific professors, staff members, or events that stood out, all eight participants cited an interaction with a professor or mentor from their student experience but three participants did not associate those memories with their proclivity to give.

Ainsley

Ainsley (2020-Present) shared:

Because I graduated so recently, most of my favorite professors are still teaching at Valley School. I enjoy accepting their invitation to visit a class or meeting them for coffee. I also joined the Young Alumni Council, which gives me another avenue to stay connected.

Beau

Beau (2010-2019) said:

My mentor for my specific program is probably my strongest relationship at Valley School. Him and the former Dean, because we still stay in touch and meet up twice a year or so. I like the new Dean but I am still getting to know him.

Royce

Royce (2000-2009) noted:

My former professor inspired my giving because I know how hard he works for his students. He is smart and dedicated and could make three times his salary if he left academia and entered the corporate space. But I know why he stays at Valley School. I also know that my corporate gift and match helps his programmatic bottom line.

Graham

Graham (1990-1999) responded:

I had two great mentors when I was a student. I stayed in touch with one of them for about 10 years, then he passed away unexpectedly. I made a modest gift in his memory because his death impacted me. I wasn't sure if I ever told him how much he helped me. My other mentor is still at Valley School. I connect with her at our annual fundraiser and come to her class once a year to talk to her students about my career.

Pierce

Pierce (1980-1989) said:

No, no current connection with any professors. But I was close with my mentor for many years before he retired. We attended conferences together and tried to stay in touch in between running into each other. When I made my gift to the building, I name a room in his honor.

Harper

Harper (1970-1979) noted:

This question is making me realize that I need to do a better job at reconnecting. I respect the Dean and had a good experience with [the former development officer] but I should get more involved with some of the work and projects that I read about in the newsletters each month. You just inspired me to send an email and connect!

Sloane

Sloane (1960-1969) replied:

My professors and mentors are gone now but my gift was made in memory of my favorite professor. She was captivating in class and taught me beyond the textbook. I felt prepared to enter the job market because of her. Back then, I was one of two women working in my company, so I often leaned on her for advice.

Brooks

Brooks (1950-1959) said:

I ended up setting up a fund for one of my professors many years ago. I think that type of giving is needed. The general fund makes a difference but when you restrict a gift to a person or program that you are passionate about, you feel connected and have a tie to the person's or program's continued success. That usually generates more giving.

Helping Current Students With Mentorship and Career Placement

The second and *who* and *what* were resoundingly centered on helping current students. When asked about a time they felt the most connected to Valley School, seven participants enthusiastically detailed their time spent mentoring current students. When asked about campus events, like reunions, three participants replied they had no effect on their engagement and giving. After probing more deeply, as each of the three participants were highly engaged with Valley School, one participant commented, “they are nice to attend but they don’t influence me to give the way helping a current student does.”

Ainsley

Ainsley (2020-Present) said:

Two of my colleagues are Valley School alumni. We always get excited to go to our class reunion together and see our fellow classmates. I love the part of reunion when we talk to current students, too, because I would definitely be interested in mentoring in the future. I benefited from good mentors during graduate school and I would like to pay that forward.

Beau

Beau (2010-2019) said:

I got synced up with two current students who are interested in my career field. We meet once every 3 months at my office and talk about the industry and how they can continue networking for their first job out of school. It’s funny to think that I was in their shoes not so long ago, so I am glad Valley School made the connection for us. It’s been a rewarding year.

Royce

Royce (2000-2009) noted:

The most significant interaction came when the development officer introduced me to my mentees. These students are so driven and smart. I really enjoy hearing their stories and aspirations and figuring out who I know in my network to help them. I don't mind giving back philanthropically, of course, but I love giving back my time even more.

Graham

Graham (1990-1999) responded:

The mentorship program, hands down. The time I've spent mentoring has been some of the most rewarding years of my career. Valley School instilled the "people for others" concept from early on in my program and that has carried through to my life after graduation.

Pierce

Pierce (1980-1989) said:

I stayed connected with current students, which makes me feel younger than I am. Well, sometimes, older than I am! They are full of life and energy and they have a great outlook on the world. Each year, I attend the scholarship reception and meet the students who received funding from our family's endowed scholarship. Their backgrounds and stories amaze me. It's incredible, really. I kept funding that account annually because Valley School does a great job of keeping me in tune with the students.

Harper

Harper (1970-1979) noted:

Ever since we created our endowed scholarship, I always go to the reception they host on campus for the scholarship recipients. We get to sit together and talk, which makes the

whole giving experience very personal because you have a chance to meet the students you're funding. That stands out as a top interaction with Valley School.

Sloane

Sloane (1960-1969) replied:

I like talking with students and telling them about my career and how I fought to have a seat as one of a few women in my company. I'm long retired, so my network isn't as strong as it used to be but I try to give them advice. The world is different today but some advice about working hard and being resilient stands the test of time.

Brooks

Brooks (1950-1959) said:

The students. I have four mentees and I talk with one of them each week when I feel well enough. Three of them are first-generation students like me. Even though I graduated almost 70 years ago, the pride of being one of the first in your family to endure a rigorous program and then graduate is an important part of all of our stories.

Summary of RQ 3

When asked about which interactions led to their engagement and philanthropy with Valley School, two themes emerged. In one way or another, each of the eight participants centered on finding meaningful ways of staying engaged. Harper (1970-1979) remarked, "Events are a nice slow boil in staying connected with friends and the school but they have a defined start and end point. I think it's important to have something with a longer runway for true engagement." Royce (2000-2009) shared, "It's really all about the people. When I feel engaged, I give."

Most of the participants shed light on how much mentoring current students makes an impact on them personally. Brooks (1950-1959) said, “Being a mentor keeps me feeling young and alive. I feel like I make a difference.” Beau (2010-2019) noted, “It starts with sincere engagement, which leads to volunteering in some capacity, which leads to giving. Each lap of the track needs to have some meaning affixed.”

Summary of Findings

Drawing on the rich data collected from the alumni donors’ own words, I discerned several themes about their lived experiences as graduates of and donors to Valley School. When asked about why they give to Valley School, three themes emerged; the most pronounced was the *why* behind their motivation to give centered on their positive reflections as graduate students and their sense of belonging within the Valley School community. The second *why* influencing their motivation to give surrounded an overall proclivity to give back, especially if the donors received scholarships to support their graduate studies. The third *why* affecting their motivation to give stemmed from a resounding appreciation for Valley School, their educational experience, and their life after graduation.

Based on the data, the *how* behind the decision-making process to give showcased several patterns among participants. Three themes emerged, including (a) being invited back to campus as an alum, (b) feeling meaningfully connected with the school and staff, and (c) having confidence in the impact of their gift. The most important *how* emerged when participants reiterated how reconnecting with their alma mater in a meaningful way, like serving as a mentor to current students, drove their engagement and philanthropy. The second *how* expressed the significance of having a strong relationship with Valley School leadership, which created a runway for their engagement. Descriptors such as open and honest communication, reliability,

consistency, authenticity, and genuine care and compassion were mentioned to support the third *how*, as participants spoke of their feelings of trust and confidence with the Dean and development officer.

The findings demonstrated the *who* and *what* that largely inspires a donor's engagement and philanthropic support and underpinned the two emergent themes, including (a) maintaining a relationship with professors and advisors, and (b) helping current students with mentorship and career placement. Most of the participants shed light on how much mentoring current students makes an impact on them personally, though the central thread that each participant shared involved finding meaningful ways of staying engaged after graduation.

In this case study, the eight participants spanned eight decades of graduation years, from 1950-Present. From Brooks (1950-1959) to Ainsley (2020-Present), each shared the same feelings toward philanthropy, despite their different generations, cultures, upbringings, and perspectives. The common thread among the participants including a theme of gratitude, appreciation, and pride in their alma mater and what the school brought to their lives. However, with a total of nine and half hours of in-person, in-depth interviews, it is not an understatement to say the practice of philanthropy is deeply personal. What drives one donor's behavior may significantly contrast from another. Dialogue with the donor is the best place to begin in building a connection between the alum and the mission of the school. This approach creates a donor-centric culture centered on the art of listening.

CHAPTER 5

RECOMMENDATIONS

The increasing importance of alumni philanthropic support in higher education makes the understanding of graduate school alumni giving through the lens of a donor vital. Using a phenomenological approach, the purpose of this case study involved examining the lived experiences of alumni donors at a private graduate school. I sought to gain a deeper understanding of donor motivations, their decision-making processes regarding gifts, and the overall interactions with the institution and its development officer. Participants in this single case study consisted of private graduate school alumni who donated \$10,000 or more since graduation. Non-alumni donors were excluded from the research. To identify potential participants and make meaning from their lived experiences, purposive sampling was applied. The lived experiences of eight alumni donors were explored through semi-structured interviews to develop an understanding of the essence of the phenomenon. Participants were encouraged to amplify their voices and share their stories and personal experiences while offering insight into their attitudes, feelings, and beliefs relating to their engagement and philanthropy.

According to Creswell and Creswell (2018), the eight participants met the standard of data saturation needed for a qualitative study. However, given (a) the small sample size; (b) the nature of the phenomenological approach, which is purely qualitative and highly subjective; and (c) my use of purposive sampling, my findings are not intended to be generalizable across alumni donors of all private graduate schools. Although the results may prove less likely to apply to other contexts, my findings will paint a picture and tell a story that might offer useful intel to

other researchers and development officers in private graduate schools with rich alumni communities.

Additionally, a potential response bias among participants may have existed, as alumni donors who feel most connected to Valley School may have been more likely to participate in the study than those who hold lukewarm thoughts about the institution. In that same vein, I would feel remiss to not mention the unique nature and spirit of Valley School. The alumni harbor an unwavering loyalty and esteem for their alma mater, especially indicated by the findings that ranged in graduation years from 1950-Present. These feelings of lifelong attachment developed because alumni consider Valley School as the beacon in their personal growth and formative shared experiences. All eight participants described their love of Valley School community and the lasting imprint the institution has left on their lives. As the researcher I recognize, cherish, and celebrate the passion and dedication shared by Valley School's alumni, but also understand this level of positivity, esteem, and love are not always replicated at other institutions. At Valley School, these contributing factors align to cultivate a lasting connection that endures long after graduation, making the institution an integral part of the participants' identity and life story.

The findings from this case study may further verify the importance of building meaningful relationships with graduate school alumni, since these alumni play an integral role in the financial well-being of postsecondary institutions (Weerts & Ronca, 2007). By understanding the giving motivations of alumni donors at the graduate school level, the implications of quality findings may improve an institution's effectiveness in building a culture of engagement and philanthropy that nurtures future alumni participation and giving. Since most of the current studies on alumni giving center on philanthropy within the undergraduate population, the results may address a gap in the literature relative to graduate school alumni giving and add evidence-

based research to the body of knowledge that may influence the work of institutional fundraising teams in graduate schools across the country.

This chapter summarizes the key findings of the case study in the context of existing literature and provides an explanatory discussion related to the research questions (RQs), interview results, and areas of future research. Related to the case study findings, recommendations are proposed, and a personal statement brings the study to a conclusion.

Summary of Major Findings

Alumni donors are essential to the financial health of most colleges and universities (Weerts & Ronca, 2007). Consequently, fostering strong relationships that lead to engaged, active alumni who desire to participate with and give back to their institution becomes paramount. If institutions rely on receiving the long-term financial benefits that alumni can offer, colleges and universities must focus on building relationships with enrolled students, maintaining those meaningful connections after graduation, and ensuring that alumni feel valued and appreciated for lending their time, talent, and treasure (Levine, 2008).

Through the following research questions, I explored the shared phenomenon of alumni who currently engage with and donate to their graduate school alma mater and the lived experiences that led them to philanthropically support the institution:

1. What factors do alumni donors use to describe their motivation to give?
2. How do they explain their decision-making process when making a gift?
3. Which interactions with the institution contributed to their willingness to donate?

To address these questions, I collected data from eight purposefully-selected alumni donors through semi-structured qualitative interviews that centered on the participants' experiences of graduating from, engaging with, and giving to a private graduate school. I

intended to better understand why participants felt motivated to give, in addition to how they perceived, described, and reflected on their philanthropic experiences. Table 9 provides a summary of key findings related to each RQ.

Table 9

List of Results, Key Findings, and Related Literature

Research Question	Results	Key Findings	Supporting Literature
What factors do alumni donors use to describe their motivation to give?	The <i>why</i> within the lived experiences centered on belonging and a strong sense of community, an inherent responsibility for giving back, and an overall appreciation for their education	Positive student experiences underpin positive alumni experiences Past student scholarships pave the way for future alumni donations Feelings of institutional gratitude feed into lifelong feelings of institutional attachment	Clotfelter (2003); Gallo & Hubschman (2003); Hunter et al. (1999); Sun et al. (2007); Weerts & Ronca (2008)
How do they explain their decision-making process when making a gift?	The <i>how</i> within the lived experiences surrounded being invited back to campus, feeling meaningfully engaged with the school, and having confidence in the impact of their gift	Receiving an invitation to visit campus and plug into student life is the first step to meaningful alumni engagement Strong rapport with the development officer and leadership team equates with solid ties to the institution and ultimately, philanthropic support Confidence in making donations stems from the enthusiasm of the development officer in explaining, clarifying, and offering transparency into the gift process	Chung-Hoon et al. (2005); Lasher & Cook (1996); Drezner & Huehls (2014); Duronio & Loessin (1993); Glass & Jackson (1998); Panas (2005); Van Slyke & Brooks (2005)
What interactions with the institution contributed to their willingness to donate?	The <i>who</i> and <i>what</i> within the lived experiences that inspired engagement and philanthropic support consisted of maintaining relationships with faculty and mentors and helping current students with mentorship and career opportunities	Alumni consider staying in touch with professors and faculty mentors as a significant, ongoing alumni interaction Mentoring current students and hiring them for internships and positions embodies a meaningful way for alumni to remain connected to the institution	Deci & Ryan (2008); Elliot et al. (2002); Pearson (1999); Ryan & Deci (2000); Van Slyke & Brooks (2005)

RQ 1: What factors do alumni donors use to describe their motivation to give?

Drawing on the rich data collected from the alumni donors' own words, I discerned several themes regarding their lived experiences as graduates of and donors to their private graduate school. When asked about why they give, three themes emerged, including feelings of (a) a strong sense of community and belonging, (b) a responsibility for giving back and paying forward scholarships received as students, and (c) fulfillment in and thankfulness for their education. The most pronounced *why* behind their motivation to give centered on their positive shared memories as graduate students and their feelings of belonging within the Valley School community. The second *why* influencing their motivation to give surrounded an overall desire to give back, especially if they received scholarships to support their graduate studies. The third *why* affecting their motivation to give developed from a resounding appreciation for their alma mater, their educational experience, and their life post-graduation.

The three key findings in RQ 1 that developed from the three emergent themes consisted of (a) positive student experiences underpin positive alumni experiences, (b) past student scholarships pave the way for future alumni donations, and (c) feelings of institutional gratitude feed into lifelong feelings of institutional attachment.

Strong Sense of Community and Belonging

The participants underscored the findings of Gallo and Hubschman (2003) when describing their sense of belonging to their graduate school community. Several communicated the importance of maintaining connections with peers, faculty, and the institution itself can encourage other alumni to contribute, which aligns with the research of Hunter et al. (1999) and Sun et al. (2007). To that end, Ainsley (2020-Present) said, "Staying connected with my professors has made graduation feel like less of a separation from the past and more like a

steppingstone into the future.” Graham (1990-1999) echoed the same sentiment and remarked, “We shared such an inclusive culture as students. We carried on that tradition as alumni. We are all still very close and connected in some way, shape, or form.” Emphasizing the significant role of alumni networks and events, as found by Hunter et al. (1999), Sloane (1960-1969) commented, “I will always stay connected to my friends from graduate school, but events make me stay connected to my broader classmates.” As noted by Weerts and Ronca (2008), alumni who feel a strong connection to their alma mater’s community might donate to maintain or strengthen that bond. This includes supporting social networks, alumni associations, and campus events that foster a sense of belonging among current students and alumni (Hunter et al., 1999). Brooks (1950-1959) shared, “It is important to remember where you came from. When you go to an event, you show current students that this relationship lasts a lifetime.” This perspective aligns with separate findings from Clotfelter (2003), Gallo and Hubschman (2003), Hunter et al. (1999), and Sun et al. (2007) that ongoing engagement and positive experiences with the institution, through events, communications, and a sense of belonging can reinforce the decision to donate. These responses also align with the key finding that positive student experiences underpin positive alumni experiences, which supports the emergent theme of a strong sense of community and belonging. Harper (1970-1979) said during member checking, “I loved my graduate school as a student. I love my graduate school even more as an alum.”

Responsibility for Giving Back and Paying Forward Scholarships

Alumni donors often expressed a desire to help ensure that future students have access to the same or better opportunities than they did, namely through scholarship support, as evidenced by the research of Monks (2003) and McDearmon and Shirley (2009). Monks (2003) found that receiving need-based awards increased the likelihood of alumni giving, which is shared by

Harper (1970-1979), who stated, “My scholarship opened the door for my life. I want to open that same door for another deserving student who wouldn’t have the same opportunity without financial help.” McDearmon and Shirley (2009) wrote that a strong belief in the value of education and a desire to support students financially, academically, and professionally can motivate alumni donations. Beau (2010-2019) emphasized that finding by commenting:

I believe in the power of education. Everyone deserves access to an education, regardless of their financial circumstances. From my perspective, education is not a privilege. It’s a right. As a donor, I need my money to speak for my beliefs.

Marr et al. (2005) posited that those who were recipients of need-based scholarships showed an increased probability of making donations post-graduation at the undergraduate level. Brooks’s (1950-1959) experience aligned with the research of Marr et al. (2005), noting, “I would not feel right about not paying forward the scholarship money I received as a student. I just would not have the life success or access I did without that initial scholarship help.”

These responses align with the key finding that past student scholarships pave the way for future alumni donations, which supports the emergent theme of a responsibility for giving back and paying forward scholarships received as a student. Ainsley (2020-Present) said, “I can’t go through life knowing I received help but never gave help. That’s against my ethos. I was raised better than that.”

Fulfillment in and Thankfulness for Their Education

Many participants donated as an expression of gratitude for the education they received and personal, social, and professional opportunities the experience afforded them, which reinforced the findings of Clotfelter (2003). A positive educational experience, both academically and socially, inspired participants to give back to aid future students in having

similar or better experiences. Royce (2000-2009) noted his feelings of gratitude and commented, “I am thankful for my experience. Much of my life was defined *during* graduate school and built *because* of graduate school.”

Similarly, and consistent with the research of Weerts and Ronca (2008), Pierce (1980-1989) shared, “If you walk into my home office, you will take one look around and see how much I love my alma mater. I am beyond grateful for that place.” These outlooks align with findings from Ford and Merchant (2010), who studied the influence of personal nostalgia on philanthropy. Highlighting the power of emotions in donating, the authors argued that emotional appeal and personal relevance contribute to nostalgia and encourage donor contributions. During member checking, Sloane (1960-1969) joked, “If you get me talking about my memories, you get me talking about my check book.” Her thought aligns with Ford and Merchant (2010), who found that tapping into the lived experiences and memories of alumni can create a more meaningful and personal connection with potential donors and motivate them to philanthropically support their alma mater.

These responses align with the key finding that feelings of institutional gratitude feed into lifelong feelings of institutional attachment, which supports the emergent theme of feelings of fulfillment in and thankfulness for their education. Brooks (1950-1959) asserted:

I have lived my life. A long life, thankfully. No matter where I have been, I have always looked back and known that I am who I am because of my education. Sure, my parents shaped me. My friends shaped me. But my school *made* me.

RQ 2: How do they explain their decision-making process when making a gift?

Based on the data, the *how* behind the decision-making process to give showcased several patterns among participants. Three themes emerged, including (a) being invited back to campus

as an alum, (b) feeling meaningfully connected with the school and staff, and (c) having confidence in the impact of their gift. The most important *how* emerged when participants reiterated how reconnecting with their alma mater in a meaningful way, like serving as a mentor to current students, drove their engagement and philanthropy. The second *how* expressed the significance of having a strong relationship with graduate school leadership, which created a runway for their engagement. Descriptors such as open and honest communication, reliability, consistency, authenticity, and genuine care and compassion were mentioned to support the third *how*, as participants spoke of their feelings of trust and confidence with the Dean and development officer.

The three key findings in RQ 2 that developed from the three emergent themes consisted of (a) receiving an invitation to visit campus and plug into student life is the first step to meaningful alumni engagement; (b) strong rapport with the development officer and leadership team equates with solid ties to the institution and ultimately, philanthropic support; and (c) confidence in making donations stems from the enthusiasm of the development officer in explaining, clarifying, and offering transparency into the gift process.

Being Invited Back to Campus as an Alum

Nearly all participants reiterated how reconnecting with their alma mater drove their engagement and philanthropy. Brooks (1950-1959) commented, “I appreciated the invite to come back. It made me feel seen in a new way because it felt personal and intentional. Like I, particularly, had something to offer.” According to Deci and Ryan (2008), psychological relatedness involves the innate desire to connect, interact, and experience others through meaningful relationships, which ultimately creates a sense of belonging and attachment, as reinforced by Graham (1990-1999), stating, “My emotional attachment increased when I got the

call to join a class as a guest speaker. I went from a proud alum to proud contributor.” Moreover, relatedness is responsible for improvements in intrinsic motivations, which plays into the emotional attachment notion and desired feeling of community between alumni and their alma mater. Sloane (1960-1969) offered, “Graduating from the school is one thing. Connecting and engaging with the school is another. I found a way of relating to current students and sharing my career story. I feel more valuable than ever as a volunteer.”

To build on Deci and Ryan’s theory, the concept of *triggers* as described by Van Slyke and Brooks (2005) provides another vehicle in understanding donor behavior. In alignment with Van Slyke and Brooks (2005), Royce (2000-2009) offered during member checking, “Just being asked gets the ball rolling. How many alumni are never asked to participant in some way, shape, or form? Find the right people and make the ask. Invite them.” This response validates the notion that personalized requests can augment individual motivations and a willingness to contribute (Van Slyke & Brooks, 2005).

In support of the emergent theme of being invited back to campus, these responses align with the key finding that receiving an invitation to visit campus and plug into student life is the first step to meaningful alumni engagement. Ainsley (2020-Present) noted:

As a friend, for example, everyone needs to feel appreciated and cared for. You need to feel wanted, you know? It’s the human condition. The same approach applies to fundraising. You’re a friend to the school. You need to feel appreciated. Cared for. Wanted. Getting a personal phone call or an invite to be a part of student life and the school means something. It says you’re not just a former student or an alum or a donor. You matter. We’re glad you came here for school. Go make us proud. Then come back and tell us all about it.

Feeling Meaningfully Connected With the School and Staff

The literature emphasized the significance of leadership as an important aspect of successful fundraising in higher education (Duronio & Loessin, 1993). To that end, all eight participants expressed feeling meaningfully connected with their alma mater staff and how the development officer created a springboard for their engagement and giving. Beau (2010-2019) remarked, “[The former development officer] was instrumental. She built the relationship and made giving feel natural, straightforward, and simple.” Drezner and Huehls (2014) suggest that the leadership qualities of a development officer are essential in driving the educational mission and ensuring the financial health of an institution, which aligns with a comment by Royce (2000-2009) during member checking, saying “[Former development officer] was sharp and up-to-speed on all the happenings. She knew names, stories, and the history of the school. She was a silver bullet.”

Development officers, according to Glass and Jackson (1998), must possess the vital attributes of motivation and self-confidence for effective leadership. Only then, the authors assert, can development officers inspire and influence alumni donors with conviction (Glass & Jackson, 1998). A remark by Sloane (1960-1969) supported the literature:

She won my heart. Sincerely. [Former development officer] was creative, resilient, and powerful. She made a meaningful connection with me from the start, even though I knew her title and what she was after. She built trust with me almost immediately and that loyalty continued for years after my gift. I have experienced some less-than-stellar fundraising people, let me tell you. The ones that make you feel like a number. \$10,000. \$50,000. \$250,000. They treat you the amount they think you can give, plain as day. The good ones are not just good fundraisers, though. They’re good humans, too. That comes

through in the way they talk, interact, and make you feel like a million bucks, even if you're only giving \$100,000.

These responses aligned with the key finding that strong rapport with the development officer and leadership team correlate with stronger ties to the institution, which supports the emergent theme of feeling meaningfully connected with the school and staff. Graham (1990-1999) communicated:

I would give without or without a good development officer because I love the school. But a good development officer makes the experience more meaningful. With a good one, giving becomes a memorable life moment. A memory. Otherwise, it is kind of just a transaction.

Having Confidence in the Impact of Their Gift

Most participants remarked on their confidence levels with the former development officer and the overall giving experience when probed to describe the staff interactions that led to their gift. Worth (2002) noted that excellent interpersonal skills and personal charisma are essential intangibles for development officers, as these qualities prove instrumental in building rapport with donors, establishing trust, and cultivating charitable contributions. When asked to reflect and provide suggestions on improving the donor giving experience, Beau (2010-2019) noted the significance of having a strong relationship with the development officer and other key members of the leadership team:

Building trust is an ongoing process, really. It requires consistent effort and commitment to grow. The development office needs to be transparent. I appreciate when I hear updates on how the donations are being used and the impact they are making.

Similarly, Sloane (1960-1969) said, “Ensure that donations are used for their intended purposes. Tell donors how their contributions are making a difference. Tell the stories. Share the data.” This aligns with the findings of Chung-Hoon et al. (2005), which reinforced the significance of communication, trust, and gratitude in the donor relationship-building process. Graham (1990-1999) also added, “Get to know your donors and understand their motivations for giving. Personal relationships foster trust and loyalty. Assign different leaders to manage relationships with key donors to make sure they feel valued and understood.” The comment aligned with the literature around best practices in donor stewardship and the cultivation of philanthropic partnerships, emphasizing the role of development officers in fostering strong and lasting donor relations (Chung-Hoon et al., 2005).

These responses aligned with the key finding that confidence in making donations developed from the enthusiasm of the development officer in explaining, clarifying, and offering transparency into the gift process, which supports the emergent theme of having confidence in the impact of their gift. Brooks (1950-1959) said, “Having integrity is crucial for a development officer. Trust is the foundation. Trust is actually everything.”

RQ 3: Which interactions with the institution contributed to their willingness to donate?

When asked about which interactions led to their engagement and philanthropy with their graduate school alma mater, two themes emerged; (a) maintaining a relationship with professors and advisors, and (b) helping current students with mentorship and career placement. The first *who* and *what* that inspired philanthropy were identified by over half of the participants as their former professors and faculty mentors. When asked about specific professors, staff members, or events that stood out, all eight participants cited an interaction with a professor or mentor from their student experience. The second *who* and *what* that largely inspired a donor’s engagement

and philanthropic support was how much mentoring current students made an impact on them personally.

The three key findings in RQ 3 that developed from the three emergent themes consisted of (a) alumni consider staying in touch with professors and faculty mentors as a significant, ongoing alumni interaction; and (b) mentoring current students and hiring them for internships and positions embodies a meaningful way for alumni to remain connected to the institution.

Maintaining a Relationship With Professors and Advisors

Nearly all participants reiterated how staying connected with professors and faculty mentors drove their engagement and philanthropy. When asked about specific professors, staff members, or events that stood out, all eight participants cited an interaction with a professor or mentor from their student experience. Beau (2010-2019) shared during member checking, “My mentor and I built a strong relationship when I was a student and an even stronger relationship now that I am working in my field.”

Although scant literature focuses on donor decision-making processes through lived experiences, the self-determination theory, as introduced by Deci and Ryan in 1985, served as a valuable framework for understanding donor motivations. According to Ryan and Deci (2000), the fundamental premise of self-determination theory is that humans are biological beings with an innate need for psychological growth and development, as reinforced by Ainsley (2020-Present) saying, “My professors helped me grow as a student. They’re still helping me grow as I launch my career.” Psychological relatedness involves the innate desire to connect, interact, and experience others through meaningful relationships (Deci & Ryan, 2008). This, ultimately, creates a sense of belonging and attachment, as mentioned by Graham (1990-1999), sharing, “My two mentors were a large part of my student experience. In some ways, both [Mentor 1] and

[Mentor 2] played an even bigger role when I graduated and figured out how to start my own business.”

These responses aligned with the key finding that alumni consider staying in touch with professors and faculty mentors as a significant, ongoing alumni interaction, which supports the emergent theme of maintaining a relationship with professors and advisors.

Helping Current Students With Mentorship and Career Placement

The second and *who* and *what* were resoundingly centered on helping current students. When asked about a time they felt the most connected to their graduate school alma mater, seven participants enthusiastically detailed their time spent mentoring current students. Brooks (1950-1959) communicated, “Mentoring students is a great source of joy in my life.”

According to Deci and Ryan (2000), competence is the confidence in one’s own abilities, as well as the need to feel effective in one’s own environment (Deci & Vansteenkiste, 2004). To feel competent, Deci and Ryan (2008) and assert that one must experience opportunities to apply their skills and talents and contribute to meaningful and purposeful activities. A remark by Graham (1990-1999) during member checking supported the literature:

I like connecting with students. Our interactions are fun and remind me of how much my mentors helped me when I was in school. Quite honestly, mentoring gives me another layer of purpose in my career. I feel valuable.

These responses align with the key finding that mentoring current students and hiring them for internships and positions embodies a meaningful way for alumni to remain connected to the institution, which supports the emergent theme of helping current students with mentorship and career placement. Royce (2000-2009) shared:

The students I mentor are top notch. They ask questions that keep me on my feet and make me remember how much I loved learning just for the sake of learning. I lost that a bit now that I'm in my career. I miss the intellectual curiosity. Fortunately, they pass along their momentum and reinvigorate me.

Discussion of Findings

Understanding what motivates donors to engage in philanthropy with their graduate school alma mater offers a glimpse into how institutions can build long-lasting relationships with their alumni. This chapter discusses the findings of the phenomenological case study, which were considered through the lens of the social exchange (Drezner, 2011) and self-determination theories (Ryan & Deci, 2000) and guided by the following research questions:

1. What factors do alumni donors use to describe their motivation to give?
2. How do they explain their decision-making process when making a gift?
3. Which interactions with the institution contributed to their willingness to donate?

Thematic analysis was used to evaluate data collected through interviews in this phenomenological case study. Results were categorized into three main groupings that reflect the lived experiences of alumni donors: the motivation behind *why* they engage and give philanthropically (RQ 1), insights into *how* they make the decision to donate (RQ 2), and reflections on *who* or *what* within the institution inspires the engagement and support (RQ 3). Excerpts from participant interviews underpinned the main categories and their respective major themes. The interconnection between groupings was demonstrated through the repetition of certain major themes across multiple categories. Often, identical excerpts were applied to reinforce various themes.

Several key takeaways may be drawn from the findings and potentially influence the work of institutional fundraising teams in graduate schools across the country. In this section, I will discuss how the findings address each of the research questions that guided the study. The discussion of the major findings of this case study is supported by the literature review presented in Chapter 2.

Donor Motivations (Why)

RQ 1 asked, from the perspective of an alumni donor, about the motivation behind *why* they engage and give philanthropically with their graduate school alma mater. Three themes emerged, including feelings of (a) a strong sense of community and belonging, (b) responsibility for giving back and paying forward scholarships received as students, and (c) fulfillment in and thankfulness for their education. The most pronounced *why* behind their motivation to give centered on their positive reflections as graduate students and their sense of belonging within their private graduate school community. The second *why* surrounded an overall proclivity to give back, especially if the donors received scholarships to support their graduate studies. The third *why* grew from a resounding appreciation for their alma mater, their educational experience, and their life after graduation.

The findings from the first RQ reveal a range of personal motivations that may drive donors to give, such as family values and early exposure to giving practices (Drezner, 2011). Drezner (2011) suggested that philanthropic motivations are often linked to, learned in, and fostered by childhood, which highlights the role of the family in shaping an individual's initial attitude toward giving. When asked to expand on his earlier response, Beau (2000-2009) continued:

My parents ingrained the importance of giving in me and my sisters from as long as I can remember. We had three jars growing up: give, save, spend. The give jar was always a priority. Even when we wanted to spend all our dollar bills on candy or a plastic toy, the give jar wasn't something we ever questioned, you know?

The results also support the notion that scholarships can favorably influence future donations from alumni. This relationship is grounded in a key finding centered on gratitude and reciprocity (Lasher & Cook, 1996). Alumni who received scholarships may feel a sense of appreciation for the financial support that paved the way for them to pursue their education. That feeling of indebtedness often translates into a desire to give back in the form of donations to support current students in the same way they were supported (Lasher & Cook, 1996). To that end, institutions that offer scholarships should maintain communication with scholarship recipients throughout their academic careers and beyond graduation (Monks, 2003). This ongoing relationship can foster a strong connection to the institution, making alumni more likely to give in the future. As posited by Monks (2003), alumni who see the direct impact of scholarships on students' lives are often motivated contributing to scholarship funds. Institutions that effectively communicate the outcomes and successes of scholarship recipients can motivate alumni to support future generations.

These findings illustrate the complexity of donor motivation. As revealed through the lived experiences of the eight participants, alumni thoughts on philanthropy often originate from upholding childhood values around giving, receiving financial support through scholarships, or feeling an overall sense of appreciation for what their alma mater brought to their lives, both personally and professionally. Spending dedicated face-to-face time with alumni can facilitate a better understanding of individual motivations on a deeper level. Ultimately, these conversations

may tailor the institution's engagement and fundraising strategies to connect more effectively with potential donors in a meaningful and compelling way.

Decision-Making Processes (How)

RQ 2 asked, from the perspective of an alumni donor, about the insights into *how* they decide to donate to their graduate school alma mater. Based on the data, the *how* behind the decision-making process showcased several patterns among participants. Three themes emerged: (a) being invited back to campus as an alum, (c) feeling meaningfully connected with the school and staff, and (c) having confidence in the impact of their gift. The most important *how* emerged when participants reiterated how reconnecting with their alma mater in a meaningful way, like serving as a mentor to current students, drove their engagement and philanthropy. The second *how* expressed the significance of having a strong relationship with Valley School professors and mentors, which created a runway for their engagement. Descriptors such as open and honest communication, reliability, consistency, authenticity, and genuine care and compassion were mentioned to support the third *how*, as participants spoke of their feelings of trust and confidence with the Dean and development officer.

The findings from the second RQ underscore the pivotal role of education in the fundraising process and highlight how development officers significantly influence donor decisions. If the foundation of successful fundraising lies in the development officer's ability to connect with donors on a personal level, institutions should hire fundraisers with attentive listening, empathy, and a sincere curiosity about the motivations, values, and interests of alumni (Worth, 2002). Once a relationship is established, development officers should concentrate on educating potential donors about different funding areas within the institution (Panas, 2005). Providing comprehensive details about particular projects, initiatives, or programs that

complement the interests and values of the alumni is one way to accomplish this goal.

Development officers must work with professors and advisors to identify the areas of greatest need within the organization in order to assist alumni in understanding where their contributions will have the biggest impact, as supported by the findings and the literature (Worth, 2002). This calls for open communication about the long-term objectives and strategic priorities of the institution, as well as a positive working relationship with faculty members.

By prioritizing this approach, development officers can more effectively influence donor giving, ensuring that donors are informed, engaged, and motivated to support the institution's goals and initiatives. This strategy not only enhances the immediate fundraising efforts but also contributes to building a sustainable culture of philanthropy within the institution.

Overall Institutional Interactions (Who, What)

RQ 3 asked, from the perspective of an alumni donor, for reflections on *who* or *what* within the institution inspires the engagement and support of their graduate school alma mater. The findings demonstrated the *who* and *what* that largely inspires a donor's engagement and philanthropic support and underpinned the two emergent themes: (a) maintaining a relationship with professors and advisors, and (c) helping current students with mentorship and career placement. Most of the participants shed light on how much mentoring current students makes an impact on them personally, though the central thread that each participant shared involved finding meaningful ways of staying engaged after graduation.

Since many alumni are motivated by the desire to give back and support the next generation, mentoring programs can foster engagement with former students while providing valuable support and guidance to current students and strengthen the alumni's connection to their alma mater (Deci & Vansteenkiste, 2004). In addition to sharing their wisdom and experience,

mentoring can be professionally fulfilling for alumni by providing an opportunity to reflect on their own career path and achievements while guiding someone else on their journey (Deci & Vansteenkiste, 2004).

Many alumni mentors see their participation as a means of making a long-term difference (Deci & Ryan, 2000). In some ways, mentoring allows alumni to reconnect with the student experience and view the institution through the eyes of current students. This can rekindle fond memories and strengthen their emotional ties, which often translates into giving (Deci & Ryan, 2000). Moreover, alumni mentors often report feeling gratified when their guidance helps a student achieve academic success, secure a job, or overcome challenges.

To maximize the benefits of alumni mentoring programs, institutions should focus on creating structured, supportive environments that facilitate meaningful connections. This includes providing training for mentors, setting clear expectations, and offering resources to support the mentoring relationship for alumni. By doing so, institutions can harness the power of their alumni networks to enhance student success and foster an engaged community.

Implications for Policy and Practice

The implications of this study may have the potential to influence the work of institutional fundraising teams in graduate schools by concentrating the development officer's efforts on the elements that possess the most potential to impact donor motivations and decision-making. In this section, recommendations for policy, practice, and future research are aligned with the findings of this study and illustrated in Table 10. Each line in the table corresponds with one of the practice recommendations that are discussed below.

Table 10

Related Recommendations Based on Findings and Supporting Literature

Finding	Related Recommendations	Supporting Literature
Positive student experiences underpin positive alumni experiences	Embed the development officer into current student life activities and events	Astin (1999); Caboni (2010); Holmes (2009); Kuh (2009); Pearson (1999); Sargeant & Shang (2010); Tinto (1993); Weerts & Ronca (2007)
Strong rapport with the development officer and faculty members equates with solid ties to the institution and ultimately, philanthropic support	Require the development officer to openly connect with alumni and invite them to campus for meaningful engagement	Caboni (2010); Holmes (2009); Leslie & Ramey (1988); McDearmon & Shirley (2009); Newman & Petrosko (2011); Weerts & Ronca (2007)
Alumni consider staying in touch with professors and faculty mentors as a significant, ongoing alumni interaction	Expect the development officer to assist professors and faculty mentors with efforts to stay in touch with alumni after graduation	Ehrich (2004); Strayhorn & Saddler (2009); Weerts & Ronca (2007)

Research in the field of higher educational development, fundraising, and alumni relations suggests several significant benefits of development officers engaging with current students. These are the key recommendations supported by literature listed in Chapter 2, as well as new literature outlined below.

Recommendation 1: Embed the Development Officer Into Current Student Life Activities and Events

Research by Weerts and Ronca (2007) shows that current students who engage with philanthropy become alumni who engage with philanthropy. To that end, studies suggest that when students soundly grasp how philanthropy impacts their educational experience, they are more likely to contribute in the long term as alumni (Weerts & Ronca, 2007).

To facilitate early engagement, I recommend that institutions position their development officers at student-centered events, such as panels, homecomings, student-driven fundraisers, and

class receptions to introduce themselves, build a relationship, and plant a seed regarding the power of giving back. Holmes (2009) supports this recommendation by citing that alumni who feel a strong connection to their alma mater are more likely to contribute financially. To strengthen this rapport from an early standpoint, I suggest that development officers begin engaging current students in conversations and events long before they ever become alumni. One measurable way of accomplishing this recommendation includes partnering the development officer with the Office of Student Services. Together, they can review the upcoming student calendar and identify key events in which the development officer's presence would facilitate connecting with current students.

According to Sargeant and Shang (2010), studies on donor relations emphasize the importance of showing the impact of donation. I recommend that development officers continue sharing stories of how contributions have directly benefited current students. One method of bringing this recommendation to fruition involves creating department-specific outreach that showcases recent highlights from a particular area of the graduate school. Development officers can connect with the Office of Marketing and Communications to share stories and emphasize accomplishments that align with each of the school's departments. Additionally, the outreach can be segmented for both graduates and current students in the department and serve as a powerful tool when cultivating an alumni donor or showing the impact of philanthropy to a current student. To support this recommendation, research on engagement strategies in higher education underscores the value of involving current students in the life of the institution (Kuh, 2009). This involvement may enhance the sense of community and shared purpose, which is beneficial for development efforts. As referenced in the literature of Chapter 2, Pearson (1999) advised department-based fundraising appeals for graduate alumni. This approach was effectively used

by Stanford's School of Engineering, which boasted a 28% increase in donations and a 44% increase in participation (Pearson, 1999). Additionally, the author advised using a "two tiered" strategy when communicating with graduate alumni, including both institution-wide messages for all alumni and smaller, more targeted departmental news updates (Pearson, 1999).

I believe that development officers may foster a future generation of involved, generous alumni by establishing connections with current students and hearing their important stories and voices as part of their own lived experiences. A committed, involved student body can, according to the literature, develop into an equally committed and involved alumni body that supports their alma mater for years to come.

Recommendation 2: Require the Development Officer to Openly Connect With Alumni and Invite Them to Campus for Meaningful Engagement

Engaging alumni in meaningful ways has been shown to strengthen their emotional and psychological commitment to the institution, which is a strong predictor of philanthropic behavior (McDearmon & Shirley, 2009; Weerts & Ronca, 2007). To honor the findings and literature, one recommendation includes requiring the development officer to openly connect and personally invite alumni to campus to witness firsthand the growth and changes that have occurred since their graduation. This can be accomplished by calling prominent alumni contributors as a customized cultivation touchpoint or personally following up with emails after an event. Additionally, I advise bringing alumni to campus so that current students may engage with them, which will help with networking, career guidance, and mentoring.

Hosting alumni events on campus, such as reunions, lectures, panel discussions, and networking events, can serve as a powerful tool for re-engaging alumni who may have lost touch over the years. Creating these events, if not already a part of the graduate school's calendar, can

reignite their interest and involvement with their alma mater, as well as foster a culture of philanthropy. I contend this may be particularly impactful in demonstrating the tangible results of donations and support, potentially encouraging further contributions. Additionally, recognizing alumni success stories could also serve as inspiration for current students (McDearmon & Shirley, 2009).

Meaningful engagement requires thoughtful planning and a genuine interest in fostering long-term relationships with alumni. For this recommendation to be effective, development officers should personalize their outreach efforts, understand the diverse interests and backgrounds of their alumni by researching them individually, and offer a variety of engagement opportunities that cater to different demographics.

Recommendation 3: Expect the Development Officer to Assist Professors and Faculty Mentors With Efforts to Stay in Touch With Alumni After Graduation

Weerts and Ronca (2007) support the consensus that alumni feel an enhanced level of engagement with the institution when they are involved in mentoring and networking with current students. This reciprocity, according to Strayhorn and Saddler (2009), becomes essential for developing long-term relationships between alumni and their alma mater. Since most impactful connections with students usually begin with professors and faculty mentors, development officers can facilitate these relationships by providing strategic tools, resources, and platforms for ongoing communication.

One recommendation to support this literature includes expecting the development officer to enhance these efforts by coordinating events, outreach, and opportunities for faculty and alumni interaction. This might be achieved by connecting with faculty that can play a significant role in engaging alumni through academic programming, research collaboration, and mentoring

opportunities. As noted by Ehrich (2004), mentoring relationships that extend beyond graduation can influence alumni's ongoing relationship with the institution. Development officers can cultivate these relationships by creating formal programs that facilitate mentorship connections between alumni and current students, as well as between alumni and faculty (Ehrich, 2004).

Literature on best practices for alumni engagement often highlights the importance of a coordinated approach that involves various stakeholders within the institution, including faculty, staff, and development officers. For this recommendation to be effective, development officers should work together with faculty and staff, namely the Office of Student Services and Office of Career Development, to create a more integrated and effective strategy for engaging alumni.

Recommendations for Future Research

Four recommendations for future researchers are detailed in the sections that follow. These proposed topics could not only enhance a deeper understanding of graduate alumni as donors but also provide actionable insights for development officers and institutions aiming to foster stronger relationships with the graduate school segment of their alumni population.

Examining Different Contexts

This study only consisted of phenomenological investigation at one private graduate school, which makes the limitations and conclusions warrant further research. Because the lived experiences of graduate school alumni donors should continue to be explored and added to the literature, value might be found in engaging in additional research at another graduate school, perhaps a public institution. Investigating the philanthropic motivations, behaviors, and engagement strategies of graduate school alumni may offer a strong area for future research, particularly as institutions seek to deepen their relationships with alumni.

Understanding Behavioral Differences Between Undergraduate and Graduate School Alumni

Future researchers could examine how the degree level (master's versus doctoral), particular field of study, or specific type of graduate program (academic versus professional) influences giving patterns, engagement levels, and motivations for staying connected with the institution. Additionally, understanding how the different segments of alumni support scholarships, capital campaigns, or the unrestricted fund could highlight whether undergraduate and graduate school alumni give back in a comparable way.

Evaluating The Effectiveness of Various Engagement Strategies Tailored Specifically to Graduate School Alumni

Future researchers could include an examination of special events, mentoring opportunities for current students, or institutional projects that shine a light on the impact of alumni donations on research and scholarship. In this case study, the responses were not as robust as anticipated regarding the institution's engagement strategies. This might be the result of participants not remembering a particular outreach effort outside of a phone call from the development officer or not having enough lived experiences with their alma mater to provide the additional detail. Nonetheless, more research involving student perceptions would help development officers to employ the most successful and effective engagement strategies.

Exploring Cross-Disciplinary Alumni Giving

Future researchers could analyze how alumni giving varies across different graduate disciplines, such as the humanities, social sciences, natural sciences, and professional programs, including medicine, law, and doctoral degrees. In this case study, participants all graduated from the same program and entered the same field, making the diversity of disciplines not a factor in the research findings.

Personal Perspective

Because this case study involved participants from a particular and restricted donor pool of alumni, many stories share intentional brevity to ensure confidentiality. My greatest promise involved honoring the commitment made to participants in safeguarding their identity while honestly and candidly sharing their personal and lived experiences as alumni donors of Valley School. To that end, reflexive journaling was prioritized to convey alumni donor impact, create a sense of intimacy, and capture raw emotions without compromising the inherent trust and regard for participant confidentiality. I jotted down my observations, feelings, and initial reactions in my reflexive journal, which developed and grew throughout the case study, and provided a crucial piece of observational evidence on alumni donor experiences, narratives, and perspectives.

During my tenure in higher education, I have come to appreciate the love and generosity our alumni donors share for their alma mater. However, and admittedly, I felt nervous to ask *more* of alumni donors by inviting these eight to join this research study. Somehow, I considered the ask to be intrusive and involved, and yet, all eight responded with a resounding “yes” to participating and sharing their stories. The gift of their time, honesty, and genuine care for Valley School was evident in their eagerness to schedule the interview and react to the questions. Following each interview, I noted my surprise, humility, and gratitude for their interest in joining the case study and moral support in hearing about my progress and doctoral journey. Their investment in me as a researcher, Ed.D. student, and development officer was not only readily apparent and heartfelt but also authentically conveyed in their confidence and trust in sharing their lived experiences with me. These personal details, as noted throughout my reflexive journal, stemmed from stories of transitioning from poverty to wealth, overcoming failing grades

to wearing a cap and gown, building lifelong friendships, and finding spouses, and experiencing the struggles, pains, joys, and celebrations that fall between the corners of their narratives which all centered around their time at Valley School. The trust bestowed upon me through their tears, smiles, and jokes left an imprint on my heart and reminded me the very power of connecting with another human being. Regarding the level of participant intimacy, I noted:

My heart is full after hearing these alumni donor lived experiences. I viscerally felt the emotion, gratitude, and scrupulousness of each response, reaction, and honest narration of their personal stories. How grateful am I to know that my professional calling is entrenched in connecting with other humans and sharing their relationship and earnest passion for telling their Valley School story. For all eight participants, Valley School defined and shaped their lives. What a gift.

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APPENDIX A
EMAILS TO PARTICIPANTS

Email:

Dear Valley School Alum,

I am currently enrolled in an Ed.D. program and studying the lived experiences of graduate school alumni donors. My research seeks to gain deeper understanding of donor motivations, decision-making processes regarding gifts, and the overall interactions with the institution and its development officer.

As a loyal and generous alumni donor, I would greatly appreciate the opportunity to learn more about your own experience with Valley School through a 60-minute individual interview. We can meet virtually or in person at a location convenient for you.

Thank you for considering the gift of your time. I value your input and insight.

With gratitude, Ash

APPENDIX B

PARTICIPANT INFORMED CONSENT FORM

I, _____, agree to participate in a research study regarding your experiences with Valley School. The purpose of this case study involves examining the lived experiences of donors from the graduate school alumni point of view. This research seeks to gain a deeper understanding of donor motivations, decision-making processes regarding gifts, and the overall interactions with the institution and its development officer.

As a participant, I understand that my participation in the study is purposeful and voluntary. All participants will have the opportunity to participate in one (1) 60-minute individual interview.

I understand that the interviewer has been trained in the research of human subjects, my responses will be confidential, and that my name will not be associated with any results of this study. I understand that the data will be collected using an audio recording device and then transcribed for analysis. Information from the audio recording and transcription will be safeguarded so my identity will never be disclosed. My identity will not be associated with the research findings.

I understand that there is no known risk or discomfort directly involved with this research and that I am free to withdraw my consent and discontinue participation at any time. I agree that should I choose to withdraw my consent and discontinue participation in the study that I will notify the researcher listed below, in writing. A decision not to participate in the study or to withdraw from the study will not affect my relationship with the researcher, William & Mary generally or the School of Education, specifically.

If I have any questions or problems that may arise as a result of my participation in the study, I understand that I should contact Ash Farrington, the researcher at anfarrington@wm.edu or Dr. Margaret Constantino at 757-221-2323 or meconstantino@wm.edu or Dr. Tom Ward, chair of EDIRC, at 757-221-2358 or EDIRC-L@wm.edu.

My signature below signifies that I am at least 18 years of age, that I have received a copy of this consent form, and that I consent to participate in this research study.

Signature of Participant

Date

Signature of Researcher

Date

APPENDIX C

INDIVIDUAL INTERVIEW PROTOCOL

Introduction: *Thank you for your participation. My name is Ash Farrington and I will be the researcher for today's interview. As a graduate school alumni donor, you have a unique point of view. The purpose of this interview is to learn more about your lived experience with Valley School. This study seeks to gain a deeper understanding of donor motivations, decision-making processes regarding gifts, and the overall interactions with the institution. Your personal information will not be connected to the results of this interview. The interview will involve 15 questions and is intended to last no longer than 60 minutes.*

Introductory Protocol: *To help with notetaking, our conversations will be recorded today. Only me, the researcher on the project, will have access to the recording, which will eventually be destroyed after the conversations are put into written form. All information will be held confidentially. Your participation is voluntary. You may stop at any time if you feel uncomfortable. Thank you for again for making the time.*

Any questions before we begin?

Probes:

Tell me more. What do you mean when you say...? What does 'sometimes' mean to you?

File Name of Audio:

Date:

Time:

Location:

Participant:

Lifetime Giving:

Warm Up

1. Why did you choose to attend Valley School?

- a. Did any particular aspect of the institution (i.e. academics, research, rankings, employment outcomes, location) play a role in your decision to enroll?
2. Do any professors, staff members, or events stand out as memorable from your student experience?

Alum Experience

3. Tell me about your experience since graduation.
 - a. Have you felt connected to and engaged with Valley School as an alum?
 - b. Can you think of a specific person or experience that motivated your ongoing relationship as an alum with Valley School?
4. Can you describe a time that you felt the most connected to Valley School?
5. In what ways do you support the Valley School?
 - a. Have you attended any on-campus events, such as athletic competitions, faculty engagements, and class reunions?
 - b. Have you assisted current students with mentorship, internship, and career opportunities?

Donor Experience

6. Do any particular people or experiences come to mind that motivated you to philanthropically give back to Valley School?
7. What factors influenced where (designation) and what (amount) you wanted to give?
8. Did you approach Valley School regarding giving or did someone from the institution approach you?

- a. Did you interact with development officers as part of your giving process? If so, how would you describe those interactions?
 - b. Did you interact with the dean, faculty, or other staff members as part of your giving process? If so, how would you describe those interactions?
9. How would you describe your overall giving experience?
10. Do you have any suggestions on how Valley School can improve the donor giving experience?

Giving Motivation

11. Alumni donors give for a myriad of different reasons. Reflecting on your past giving to Valley School, how would you best describe your motivation to give?
12. Thinking about your gift(s), could you share any characteristics you personally uphold that may have motivated you to give?
13. From Valley School people and experiences to your own personal characteristics, what do you ascribe as the *most* important motivator in your giving as an alum?
14. Do you support your undergraduate alma mater or any other nonprofit organizations?

Wrap Up

15. Is there anything else you would like to share that is important to you?

VITA

ASHLEY JONES FARRINGTON
anfarrington@wm.edu

Professional Experience

Higher Education and Independent School Fundraising
2014-Present

Medical Foundation Fundraising
2007-2014

Pharmaceutical Sales
2006-2007

Educational Experience

Ed.D., Educational Policy, Planning, and Leadership
William & Mary
Williamsburg, VA
2024

MBA, Marketing
Seton Hill University
Greensburg, PA
2005

B.S., Health Policy and Administration
Pennsylvania State University
University Park, PA
2004