



## Measuring stewardship in public relations: A test exploring impact on the fundraising relationship

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### ABSTRACT

Though scholars have explored the impact symmetrical relationship maintenance strategies from interpersonal and marketing communication in public relations contexts, they have largely ignored stewardship. Explicated by Kelly [Kelly, K. S. (2001a). Stewardship: The fifth step in the public relations process. In R. L. Heath (Ed.), *Handbook of public relations* (pp. 279–289). Thousand Oaks, CA: Sage] as a core component of the ROPES process of public relations, the “S” or stewardship proposes four elements that foster relationship growth when incorporated into organization’s strategic efforts. This study created original scales to measure the impact of reciprocity, responsibility, reporting, and relationship nurturing in the fundraising setting. Results indicate that donors favor these strategies, and path analysis demonstrates they have significant impact on how donors evaluate the nonprofit organization–donor relationship.

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In 2006, Americans donated \$295 billion to charitable organizations (Giving USA Foundation, 2007). Fundraisers play a critical role in ensuring that charitable nonprofits receive their share of these contributions from major gift donors, who are capable of giving multi-million dollar gifts, to annual giving donors, who give donations that range from \$5 to several thousands of dollars.

Fundraisers traditionally have recognized the value that relationships play in securing major gifts and donor participation in planned giving programs. However, organizations increasingly are realizing the importance of cultivation of annual giving donors. Given the increasing focus on relationship cultivation for both donor types, the purpose of this study is to examine the impact stewardship strategies have on donors.

### 1. Literature review

#### 1.1. The nonprofit-donor relationship

Countless practitioner books and workshops tout the value of relationships in fundraising (e.g., Worth, 2002). By dedicating more time to donor relations and stewardship, O’Neil (2007) says that these principles can result in increased donor loyalty to the organization.

Hall (2002) stresses that if an organization wants to ensure its longevity then it should be prepared to dedicate time to developing relationships with its donors. In the typical nonprofit-donor relationship, an individual first makes a small gift to an organization typically as a result of a direct mail or telephone solicitation. Over time, fundraising practitioners despite

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their organizational role work to demonstrate the organization's effectiveness and responsible management of donations to grow relationships with donors (Tindall, 2007).

The fundraising staff pursues larger donations from donors as the relationship between the nonprofit organization and the donor grows (Kelly, 1998). Fundraisers may use suggestions in written direct mail pieces or verbal cues with telephone solicitations to suggest specific donation amounts to help the organization; these donations are increased not only to advance the relationship but also to maintain the same amount of giving when inflation is considered. Face-to-face meetings and solicitations may be conducted, especially for major gift donors. Once gifts have been received from either annual giving or major gift donors, fundraisers continue to use various strategies to grow the relationship because research has shown that those most likely to donate in the future are those that have given in the past (Sargeant, 2001).

### 1.2. Stewardship

Kelly (1998) first introduced the concept of stewardship in relation to fundraising; however, she recognized the behaviors she prescribed for nonprofits also were practiced in other public relations domains (Kelly, 2001a). Hon and Grunig (1999) listed the four stewardship strategies as symmetrical strategies that organizations should use to foster relationship growth with their publics, and Ledingham (2003) asserted that stewardship was a necessary component of relationship management. Despite being valued as concepts, the four stewardship strategies—reciprocity, responsibility, reporting, and relationship nurturing—have not been tested or presented in any of the other organization–public relationship studies despite Kelly's argument that stewardship is the second most important step in the public relations process.

### 1.3. Reciprocity

Reciprocity simply means that organizations must demonstrate gratitude toward their stakeholders. Two underlying dimensions of reciprocity include the acknowledgement of the publics and a sincere expression of appreciation on behalf of the organization. For nonprofit organizations, fundraisers need to acknowledge and thank donors in a timely manner for their gifts by offering a receipt declaring the tax deductibility of the gift and a note of appreciation.

Grunig and White (1992) viewed reciprocity as being the basis for social responsibility. When publics adopt positive attitudes and behavior that support organizational activity, organizations have an obligation to reciprocate that support. By repaying these obligations, organizations are able to maintain the social balance with their publics.

### 1.4. Responsibility

On a basic level, this component of stewardship is very similar to the “keeping promises” relationship strategy proposed by Hung (2002). If an organization desires longevity, it has an obligation to act in a socially responsible manner for its stakeholders.

For fundraising, an organization and its fundraisers have an obligation to make sure that funds donated to specific causes or programs are only used for those programs. Betraying that trust is a costly mistake that fundraisers cannot allow because it is much simpler to have a donor renew their gifts to an organization than for the same fundraiser to go out into the community and find new donors.

### 1.5. Reporting

Organizations need to keep its publics informed about developments on issues for which support was sought. Organizations can demonstrate their accountability by providing open, accurate information to their publics. Leeper (1996) connected the concepts of responsibility and reporting in her discussions of how organizations should strive to be ethical community members.

In light of recent scandals in the nonprofit sector, fundraisers need to ensure that organizations use their Web sites to demonstrate financial accountability by providing IRS 990 tax forms and audited financial documents and their social accountability by informing current and potential clients about their programs and services. Relationships with these groups cannot be maintained if an organization does not voluntarily report this information and only communicates when it needs support.

### 1.6. Relationship nurturing

As public relations scholarship continues to document the impact of relationship cultivation with different stakeholder groups, practitioners' abilities to nurture those relationships becomes more important for long-term successes. To truly reach this level, organizations must recognize the importance of supportive publics and keep them in mind when any decisions are made.

Opportunities to nurture relationships with publics are numerous. Nonprofit organizations should make sure donors receive copies of newsletters and annual reports. Major gift donors and prospects should be invited to special events and open houses. As the relationship strengthens, fundraisers may also send handwritten cards for special occasions, such as

birthdays, anniversaries or upon learning of serious illnesses. The extra effort required to cultivate relationships with any public will benefit organizations in the future because this demonstrated concern will reduce the impact of potential crises.

The study's hypothesis predicts differences between the donor groups based on fundraising literature's tenets of devoting more time and resources to cultivating relationships with major gift donors:

**H1.** Major gift donors will rate the relationship cultivation strategies more positively than annual gift donors (e.g., those who give less than \$10,000).

Given the variety of stewardship strategies, it is important to understand if any of them are more influential than others in determining how the relationship is evaluated. Fundraisers can gain a competitive advantage if they know what stewardship strategies are more likely to increase donors' feelings of trust and commitment. To determine the impact of the stewardship strategies on the donors, a research question was created:

**RQ1.** Which stewardship strategies are most influential in influencing donors' evaluation of their relationship with the nonprofit organization?

## 2. Methodology

Surveys and follow-up postcards were mailed to a random sample of annual giving and major gift donors to a nonprofit hospital in the Western United States. As fundraising practitioners and scholars have suggested, annual giving campaigns generate donations ranging from \$10 to \$10,000 for healthcare nonprofits (e.g., Kelly, 1998; Worth, 2002). Gifts greater than \$10,000 are typically handled by development officers working in major gift programs. For this reason, donors who had contributed gifts larger than \$10,000 were considered major gift donors, and those who had made gifts smaller than \$10,000 were annual giving donors.

To better understand the impact of their cultivation efforts, it is necessary to understand the participating organization. At this hospital, 18 members of the board of directors, largely composed of business leaders and surgeons from the surrounding area, play a significant role in assisting the four staff members with the fundraising efforts. Additionally, 11 other key administrators are active in fundraising for the organization. Therefore, the fundraising team consists of 33 individuals. Of the four staff members, one staff member is responsible for the annual giving program's cultivation and mailings (e.g., thank you notifications, update newsletters, and direct mail solicitations) while the three remaining employees are involved with the major gift program (e.g., donor research, face-to-face meetings and solicitations, and hosting donor recognition events).

The fundraising staff pulled a random sample of 800 donors so that the annual giving and major gift donors were proportionally representative of the organization's donor database. In cooperation with the participating hospital, the survey instrument was printed on white paper for annual giving donors and ivory for major gift donors so that the research team could easily decipher what category the donors represented. The instruments were mailed with a cover letter, and the surveys were returned to a post office box used by the research team.

Of the 800 donors invited to participate in the survey, 556 completed the surveys, which resulted in an overall survey completion rate of 70%. The high response rate is attributed to collaborating with the organization's Vice President of Development in writing a cover letter that emphasized the results would be used to improve the organization's fundraising efficiency and effectiveness in addition for academic purposes.

In addition to anonymously collected demographic information, this survey incorporated Hon and Grunig's (1999) scales for measuring relationship outcomes (trust, satisfaction, commitment and control mutuality) and created original scales to measure the four stewardship dimensions. The scales used a 9-point scale ranging from strongly disagree (1) to strongly agree (9).

To develop the new stewardship scales, advice from public relations scholars and fundraising practitioners was sought after developing an initial pool of potential statements based on meetings with the hospital's fundraising team. The recommended final scales were then pretested with a sample of 45 donors to another nonprofit organization. Additionally, eight donors agreed to go through the survey with the research team over the telephone so that any questions about items could be discussed. Revisions, when necessary, were made to the scales after the pretest before full survey implementation.

Table 1 presents the items created to measure the four stewardship strategies. Cronbach alpha values for the new scales indicate that the scales were reliable. Additionally, the indices for the relationship outcomes were found to be reliable with Cronbach alpha values ranging from .83 to .93.

## 3. Results

Of the 556 participants in the study, 451 were annual giving donors, and 105 were major gift donors. The donors have been giving to the organization for a mean of 6.9 years though their giving histories ranged from 1 to 18 years. More than 45% of the participants donated to the organization in the previous year's fundraising campaign. Demographically, the participants were mostly female (58%) with a mean age of 43. The participants represented the diversity of the region: Caucasians (48%), Asian/Pacific Islander (18%), Middle Eastern (11%), African-American/Black (9%), Hispanic (8%), and Native American (3%).

**Table 1**  
Cronbach's alpha values for stewardship indices.

Variable	Index items
Reciprocity ( $\alpha = .80$ )	The organization acknowledges fundraising donations in a timely manner. The organization always sends me a thank you letter for my donations. The organization is not sincere when it thanks donors for their contributions. (Reverse) Because of my previous donations, the organization recognizes me as a friend.
Reporting ( $\alpha = .88$ )	The organization informs donors about its fundraising successes. The organization tells donors how it has used their donations. The organization's annual report details how much money was raised in that year. The organization does not provide donors with information about how their donations were used. (Reverse)
Responsibility ( $\alpha = .90$ )	The organization considers its donors when deciding how to use their donations. The organization uses donations for projects that are against the will of the donors. (Reverse) Donors have confidence that the organization will use their donations wisely. The organization tells donors what projects their donations will fund.
Relationship nurturing ( $\alpha = .83$ )	Donors only hear from the organization when it is soliciting for donations. (Reverse) The organization is more concerned with its fiscal health than with its relationships with donors. (Reverse) Donors receive personalized attention from the organization. The organization invites donors to participate in special events that it holds.

### 3.1. Hypothesis 1

Overall, the four strategies were evaluated positively by the donors. All were significantly above the neutral point on the 9-point scale. Reciprocity received the highest evaluation ( $m = 7.01$ ,  $sd = 0.98$ ), and relationship nurturing received the lowest evaluation ( $m = 6.29$ ,  $sd = 1.16$ ). Reporting ( $m = 6.84$ ,  $sd = 1.07$ ) and responsibility ( $m = 6.77$ ,  $sd = 1.06$ ) were also viewed favorably.

To determine if the major gift donors' evaluations of the relationship cultivation variables were statistically different from those of the annual giving donors, a one-way ANOVA was conducted comparing the views of the two groups. Table 2 presents the findings. Major gift donors evaluated all of the stewardship strategies more strongly than annual giving donors. The smallest difference between the two groups' evaluations was for responsibility (0.44), and the biggest difference was found for reciprocity (1.00); however, all of the evaluations were different at the  $p < .001$  level of significance, and the hypothesis was supported.

### 3.2. Research Question 2

Even though analyses determined that donors in the study evaluated all of the stewardship strategies positively, these mean scores reveal little about the effect the cultivation strategies have on the nonprofit-donor relationship. To determine which strategy had the greatest impact on how donors evaluated their relationship with the nonprofit organizations, a path analysis was conducted to test the linkage between each of the strategies and the four outcomes. After conducting a confirmatory factor analysis in Amos 7.0, the data fit the model as all of the criteria were successfully met ( $\chi^2 = 2.36$ , CFI = .99, GFI = .99, NFI = .97, and RMSEA = .03).

Table 3 highlights that only three of the four stewardship strategies had a significant influence on donors' evaluation of the relationship dimensions. All of the significant paths were positive. Responsibility and relationship nurturing influenced all four of the relationship dimensions while reporting significantly impacted commitment, satisfaction, and control mutuality. Reciprocity, the strategy that was evaluated most positively by the donors, had no significant influence on any of the four relationship outcomes.

The analysis revealed that every relationship cultivation strategy except for reciprocity had a direct influence on the evaluation of the relationship dimensions. Relationship nurturing represented four of the give strongest links. The strongest path was between relationship nurturing and trust ( $\beta = .24$ ,  $p < .001$ ), and it was followed by relationship nurturing and commitment ( $\beta = .19$ ,  $p < .001$ ), responsibility and commitment ( $\beta = .16$ ,  $p < .001$ ), relationship nurturing and satisfaction ( $\beta = .15$ ,  $p < .001$ ), and relationship nurturing and control mutuality ( $\beta = .15$ ,  $p < .001$ ).

**Table 2**  
One-way ANOVA on evaluation of cultivation strategies by donor type.

Source of variation	Overall donors' mean (SD) ( $n = 556$ )	Major gift donors' mean (SD) ( $n = 105$ )	Annual giving donors' mean (SD) ( $n = 451$ )	df	MS	F	p-value
Reciprocity	7.01 (0.98)	7.79 (0.64)	6.79 (0.94)	1, 554	83.99	105.86	.000
Reporting	6.84 (1.07)	7.19 (0.90)	6.72 (1.09)	1, 554	19.78	17.60	.000
Responsibility	6.77 (1.06)	7.11 (0.78)	6.67 (1.10)	1, 554	16.80	15.51	.000
Relationship Nurturing	6.29 (1.16)	6.83 (0.98)	6.10 (1.13)	1, 554	44.51	36.13	.000

**Table 3**

Path model of relationship cultivation strategies and organization–public relationship dimensions.

Path	Standardized coefficient	Standardized error
Reporting → control mutuality	.08	.03**
Reporting → satisfaction	.08	.03**
Reporting → commitment	.10	.03***
Responsibility → trust	.11	.03***
Responsibility → control mutuality	.14	.03***
Responsibility → satisfaction	.14	.04***
Responsibility → commitment	.16	.04***
Relationship nurturing → trust	.24	.03***
Relationship nurturing → control mutuality	.15	.03***
Relationship nurturing → satisfaction	.15	.03***
Relationship nurturing → commitment	.17	.03***

\*\*  $p < .01$ .\*\*\*  $p < .001$ .

Examining the impact of the four strategies, relationship nurturing and responsibility influenced the four relationship outcomes more than the remaining stewardship strategies. In addition to commitment, responsibility significantly impacted satisfaction ( $\beta = .14, p < .001$ ), control mutuality ( $\beta = .14, p < .001$ ), and trust ( $\beta = .11, p < .001$ ).

Of the two remaining strategies, only reporting influenced the relationship outcomes in a significant manner. Reporting positively impacted commitment ( $\beta = .10, p < .001$ ), satisfaction ( $\beta = .08, p < .01$ ), and control mutuality ( $\beta = .08, p < .01$ ). Despite receiving the highest evaluations from the donors, reciprocity did not have any significant influence on the donors' evaluation of the nonprofit organization–donor relationship.

#### 4. Discussion

This study sought to advance the field's discussion of relationship management by creating scales to measure Kelly's (2001a) stewardship strategies and to better understand how these strategies impact the nonprofit organization–donor relationship. Through self-reported data, the study found that major gift donors and annual giving donors positively evaluated all of the stewardship strategies. Path analysis revealed that even though reciprocity was viewed most favorably by all donors it was not as significant in impacting the four relationship dimensions.

After the Enron and MCI WorldCom financial crises, the federal government passed the Sarbanes-Oxley Act of 2002 to increase organizational transparency and accountability. Although this legislation does not apply to nonprofits, many have chosen to voluntarily adopt the requirements set forth by the law. This decision was made because large numbers of the public have lost faith in the nonprofit sector. The results of this study provide insights as to how fundraisers can attempt to regain this confidence by focusing on specific stewardship strategies to build the levels of trust that the donors feel toward the organization. Specifically, the results revealed that focusing on responsibility ( $\beta = .11, p < .001$ ) and relationship nurturing ( $\beta = .24, p < .001$ ) could help strengthen the feelings of trust.

Kelly (2001a) stresses that “organizations must demonstrate through their actions that they are worthy of supportive attitudes and behaviors” (p. 285). Paralleling the field's discussion of corporate social responsibility, nonprofit organizations must use donations according to how they informed donors they would be used. Also, they must demonstrate their commitment to their stakeholders by using their available resources in a socially and fiscally accountable manner while pursuing their missions.

Fundraisers generally acknowledge that it is much easier to obtain a second donation from a previous donor than it is to go out and search for new donors. Greenfield (1996) estimates that charitable nonprofits will spend \$1.50 for every \$1 raised from new donors, while only spending \$0.25 for every \$1 raised in renewals. Relationship nurturing plays an important role in securing future donations and in fostering the growth of trust according to the results of this study. Kelly (2001a) suggests practitioners “accept the importance of supportive publics and keep them at the forefront of the organization's consciousness” (p. 286). Fundraising and public relations practitioners must keep the longevity of the organization in mind when interacting with supportive publics on a day-to-day basis because every single exchange provides an opportunity to nurture the relationship.

Although donors' personal commitment and feelings of satisfaction are important to the well-being of the nonprofit organization–donor relationship, previous findings have found that trust is the most important variable in the fundraising relationship (Waters, 2008). Kelly (2001a) cautions that “betraying public trust is expensive” (p. 285). For nonprofit organizations, misuse of donor funds can cause donors to sever ties with the organization.

In 1993, the Association of Fundraising Professionals, the Council for Advancement and Support of Education, the Association for Healthcare Philanthropy, and the Giving Institute created “A Donor Bill of Rights.” The fourth of the 10 rights states that donors should “be assured their gifts will be used for the purposes for which they were given.” (AFP, 1993, IV). Fundraisers recognize the value of this tenet, and they strive to be responsible to their donors. Dr. Bernadine Healy announced that the Red Cross would only use donations made to the organization after the September 11th terrorist attacks for immediate relief efforts rather than creating an endowment to use for future attacks when donors complained about the misuse of their

gifts. Fundraisers must not violate the donors' trust, but they must also communicate their responsible behavior to their donors.

Although acting responsibly can help an organization build levels of trust, the results of the path analysis reveal that nurturing the relationship over time is an even stronger method of developing trust. In this study, relationship nurturing was operationalized as the organization making efforts to communicate with its donors outside of the fundraising context. Specifically, donors were asked if they received personalized attention, were invited to special events, or were contacted for reasons other than solicitations.

Fundraisers recognize the value of staying in touch with donors. In outlining the typical fundraising campaign, Kelly (2001b) said that only 15% of a fundraiser's time should be spent on soliciting donations. The majority of a fundraiser's time is spent on developing relationships with donors and potential donors. Grace (1991) said that fundraisers had an obligation to let donors "know on a regular basis that you care about them, respect their support, appreciate their gifts, and want their interest and involvement" (p. 158).

Fundraising "how-to" guides often use anecdotes to describe how fundraisers clip wedding announcements from newspapers if a donor is mentioned or how birthday or get-well cards are often sent to donors. Though relationship nurturing does not have to become this personal, organizations should recognize the importance of the publics that support them and keep them in mind when making decisions. Whether it is filling membership on the board of directors, involving them in program or service delivery, or asking them to attend an event, opportunities to nurture relationships in fundraising are plentiful.

## 5. Conclusion

Kelly's (2001a) stewardship strategies detail specific acts nonprofits can use to nurture relationships with their stakeholders. Based on the current study, donors appreciated reciprocity, responsibility, reporting, and relationship nurturing. Fundraisers are encouraged to incorporate all of these strategies into their campaign planning. However, the results of the path analysis reveal that specific actions can be taken to foster growth of specific dimensions of the nonprofit organization–donor relationship. Engaging donors in more conversations to let them know they are appreciated will help encourage more loyalty in the relationship, but the nonprofit organization must also demonstrate that it is committed to being both socially and financially accountable.

Recent research on the nonprofit organization–donor relationship has indicated that annual giving and major gift donors experience the relationship differently (Waters, 2008). Although the donors in the study all favored the stewardship strategies, major gift donors valued them more. These findings support the notion frequently found in practitioner handbooks that fundraisers dedicate more time to developing relationships with donors who have the potential to donate large contributions. Though beyond the scope of the current research project, increased understanding of the impact the stewardship strategies have on the donor subsets would greatly benefit nonprofit organizations' fundraising practices.

### 5.1. Limitations of the study

The first limitation concerns the generalizability of the study. The results of this study cannot be generalized beyond the scope of this one organization. Even though healthcare is often studied because of its use of advanced fundraising strategies and tactics, it is difficult to say that the strategies used in this specific nonprofit organization–donor relationship are representative of how other nonprofits operating in the social services, religious, or educational realms carry out relationship cultivation. Additionally, this organization has a large endowment; therefore, it has more resources to dedicate to fundraising cultivation. Smaller organizations may implement stewardship strategies differently than an organization with significant resources.

### 5.2. Future research

Even though Hon and Grunig (1999) discussed stewardship as one of the symmetrical strategies that could impact the organization–public relationship, scholars have not attempted to measure these strategies. Kelly (2001a) has proposed that these strategies are the second most important step in the public relations process. Hopefully, future research will take these scales and test this claim. Though they will need to be modified to be tested universally across public relations' many specializations, testing for the presence of stewardship in investor relations, the agency–client relationship, and other settings will enhance the field's understanding of relationship cultivation.

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