2024

A Sequential Explanatory Mixed-Methods Study of Fundraisers' Self-Disclosure in Major Gift Fundraising Relationships

Nelson, Deanna

https://pearl.plymouth.ac.uk/handle/10026.1/22173

COPYRIGHT STATEMENT

UNIVERSITY OF PLYMOUTH

A Sequential Explanatory Mixed-Methods Study of Fundraisers' Self-Disclosure in Major Gift

Fundraising Relationships

by

DEANNA R. NELSON

A thesis submitted to the University of Plymouth in partial fulfilment for the degree of

DOCTOR OF PHILOSOPHY

Plymouth Business School (Faculty of Arts, Humanities and Business)

March 2024

such certainty that somehow you convinced me it was possible. Thank you for enduring countless hours of my lamentation, self-doubt and overwhelm, and for celebrating the victories along the way. I love you more than you will ever know. Eleanor and Edie, your cheers and questions, words of encouragement, (many!) moments of silence, post-it notes, and white board messages filled with affirmations and support, helped me take things one step at a time and gave me strength to keep going. Ultimately, I finished this PhD for you – so that you would know that we all can do hard things. And, although it's not a little brother (ha, ha), I do feel like the newest member of our family is finally here. Its name is: PhD. Now, let's celebrate! Love, love, love.

Abstract

Name: Deanna Nelson

Title: A Sequential Explanatory Mixed-Methods Study of Fundraisers' Self-Disclosure in U.S. Major Gift Fundraising Relationships

This study explores the role of fundraisers' self-disclosure in major gift fundraising relationships. Building relationships with major donors to secure major gifts is a primary concern for leaders of non-profit organisations (Buteau et al., 2019) because major gifts can have a transformational impact on an organisation's work. However, the existing literature demonstrates that interpersonal aspects of relationship development, such as utilising self-disclosure to establish and strengthen relationships, have not been sufficiently researched in the literature. Social penetration theory (Altman & Taylor, 1973), which states that relationships progress through phases defined by sharing increasingly more personal information, serves as the theoretical underpinning for the research.

The current research was conducted in two phases. The first phase included a cross-sectional survey distributed at one U.S. institution of higher education (N = 290). The second phase included 20 semi-structured interviews with major gift fundraisers who work in higher education. Key findings indicated that self-disclosure is an important part of fundraiser-donor interactions and helps fundraisers build trust with donors by 'humanising' the fundraiser and making the donors feel more comfortable. Fundraisers perceive their disclosures help facilitate fundraising interactions, and in some cases, increase the likelihood of a donor giving. Contributions to knowledge include identifying self-disclosure as an effective tool for

fundraising relationship development, increasing understanding of how fundraisers use self-disclosure to build relationships with donors, testing social penetration theory (Altman & Taylor, 1973) in a new context, fundraising, and investigating its predictive power on donors' giving intention, and further expanding the understanding of the role fundraisers play in the fundraising process.

Table of Contents

List of Tables

List of Figures

Chapter 1: Introduction

1.1 Overview

Support from major donors can be transformational for non-profit organisations (Sargeant & Shang, 2010), including colleges and universities. For example, acording to the most recent data available, individuals in the U.S. donated $484.85 billion to charity in 2021, and 67%, or $326.87 billion, was donated by individual donors (Giving USA Foundation, 2022). In the higher education sector specifically, the Chronicle of Higher Education lists 55 gifts from individuals to U.S. institutions of higher education of more than $100 million (Chronicle.com, 2022). Because of the significant impact high-dollar donations can have on organisations, building relationships with major donors, or individuals who make significant philanthropic contributions, is a top priority for leaders of non-profit organisations (Buteau et al., 2019).

Donors most often donate because they are asked, and they are most often asked by fundraisers (Andreoni et al. 2017). Thus, it may come as no surprise that the primary job responsibility of fundraisers who work with major donors is relationship building (Hartsook & Sargeant, 2010). Fundraisers are urged in vocational trainings and the practitioner literature to build genuine relationships with their donors (Burnett, 2002; Burk, 2008), establish rapport (Weinstein & Barden, 2017) and even love their donors (Pitman, 2008). It is argued that fundraisers should create authentic connections with donors which mirror their relationships with friends and close others (Alborough, 2019). Furthermore, fundraisers who establish long-term, authentic relationships with donors raise more money (Breeze, 2017).

However, little is known about *how* fundraisers do the critical work of building relationships with donors. Research from social psychology and marketing suggests that individuals in other types of relationships (outside the fundraising context) build relationships with others by exchanging self-disclosure (Berg, 1987; Sprecher & Hendrick, 2004; Haytko, 2004) for example, to encourage future interactions (Hansen & Riggle, 2009), to communicate to others that the relationship is a safe and trusting one (Sprecher & Treger, 2015), and to validate and support the other's life experiences (Slepian & Moulton-Tetlock, 2019). In professional relationships, salespeople who self-disclose to customers are perceived as more genuine and their disclosures help put customers at ease, making them less likely to leave the relationship during challenging economic conditions (Hansen & Riggle, 2009). For this research, self-disclosure is defined as a voluntary act whereby individuals reveal information, thoughts, and feelings about themselves to at least one other person during an interaction (Greene et al., 2006).

In their daily work, fundraisers strive to get donors to disclose as much as possible about themselves (Hartsook & Sargeant, 2010) to get to know them better, understand their motivations for giving or to be able to make a connection between the donor's interests and the needs of the organization or its mission. Fundraisers are encouraged to practice active listening (Drollinger, 2018) and to keep the conversation focused on the donor (Hartsook & Sargeant, 2010), which emphasises the donors' contributions to the conversation and says little about the fundraiser's role as a conversational partner.

However, common sense suggests, and empirical research confirms, that self-disclosure is not a one-sided activity (Altman & Taylor, 1973). In everyday life we experience self-disclosure as an

2

exchange process whereby individuals take turns disclosing information to others. Furthermore, a handful of studies have acknowledged that fundraisers do, or should, disclose to donors during the fundraising process (Breeze, 2017; Breeze & Jollymore, 2017; Ragsdale, 1995; Shaker & Nelson, 2021). However, no research to date has intentionally studied self-disclosure in a fundraising context.

This doctoral dissertation research aims to investigate the role of fundraisers' self-disclosure in fundraiser-major donor interactions. Focused on major donors and major gift fundraisers, the current research is conducted in a U.S. higher education setting. This context is ideal because institutions of higher education attract significant major gifts from high-net worth donors (Nwakpuda, 2020) and according to the Giving USA Foundation (2022), donors donated more to education ($71.34 billion), including higher education, than any other cause except for religion ($131.08 billion) in 2021. Fundraising programmes in higher education in the United States are more sophisticated than in other countries such as Canada and the UK (Nyman et al., 2018), and 85 of the wealthiest 100 universities in the world are located in the United States, an indication of fundraising success (Nyman et al., 2018).

The sections that follow present background and contextual information including definitions of key terms, the theoretical and conceptual frameworks used to guide the research, and a critical evaluation of the literature research. Next, a statement of the problem is provided followed by a discussion of the research aims, objectives and questions. The chapter concludes with a description of the subsequent chapters.

1.2 Background

This section defines key terms that are important to understand in relation to the current research, provides background information that describes what fundraising is and why relationships are so important to the work of fundraising and identifies the key theories and concepts that guided the research process.

1.2.2 Definition of terms

Fundraisers

In this research, fundraisers are defined as individuals who raise money from donors to support the organisations and institutions for which they work (Chapman et al., 2022). Because this research focuses on major donors and major gifts (defined below), the fundraisers of interest in this research are those who work with major donors, often called major gift officers or major gift fundraisers.

Major donors

Major donors are defined in this research as individuals who make significant contributions to non-profit organisations that are larger than what the organisation typically receives (Nwakpuda, 2020). In addition to the amount of money they donate to an organisation, major donors are distinct from other donors in several significant ways: 1) they have ongoing, usually long-term relationships with the organisations they support, 2) they interact one-on-one with fundraisers during personalised interactions, 3) they become engaged in the work of the organisation, and 4)

they develop strong feelings about their giving and the organisations they support (Sargeant &

Shang, 2010), and 5) many major donors self-disclose as part of the fundraising process. These

distinctions help create an environment that is conducive to mutual self-disclosure and informs

the current research project.

Major gifts

There is no consensus on what constitutes a major gift (Sargeant et al., 2015). The definition of a

major gift is dependent upon the organisation that receives it. Major gifts typically represent an

amount that is much higher than a U.S. non-profit organisation's average donation, representing

between 10 – 30% of an organisation's annual budget (Knowles & Gomes, 2009). For example,

at some smaller non-profit organisations, a $1,000 gift would be considered a major gift. At

another, larger organisation, the major gift threshold might be as much as $1 million. In the

academic fundraising literature, U.S. major donors have been defined in at least two past studies

as individuals who have given a one-time gift of $10,000 or more (Prince & File, 1994; Waters,

2008). In defining what constitutes a major gift for the current research, the researcher

considered these past studies as well as the subjective definition provided by the institution that

distributed the survey. That institution defined a major donor as someone who had made a one-

time donation of $10,000 or more.

Self-disclosure

In the social psychology literature, Greene et al.'s (2006) definition of self-disclosure is widely

used (Chaudoir & Fisher, 2010; Sprecher et al., 2013; Smith & Brunner, 2017; Derlega et al.,

2008). They define self-disclosure as a voluntary act whereby individuals reveal information,

5

thoughts and feelings about themselves to at least one other person during an interaction (Greene et al., 2006). This is the definition used for the current research.

The next section discusses what fundraising is and the importance of relationships, especially to major gift fundraising.

1.2.1 Fundraising and relationships

In the United States, non-profit organizations exist to meet human needs and improve individuals' quality of life (Weinstein & Barden, 2017). Unlike corporations, which earn profits that are shared with business owners and shareholders, non-profit organizations exist entirely to provide services and programmes that benefit others (Rebetak & Bartosova, 2019). Non-profit organizations rely on fundraising programmes, which provide resources to help non-profit organizations accomplish their mission (Tempel, 2010).

It has been suggested that the dominant paradigm[3] that guides contemporary fundraising programmes is relationship fundraising (Breeze, 2017). The concept of relationship fundraising, which was introduced to the field by Penelope Burke and Ken Burnett in the mid-1990s, is the cornerstone of the fundraising industry today. Put simply, as Tempel (2010) states, there is nothing more important to the profession than relationship fundraising. In relationship fundraising, the focus is on meeting the unique needs of donors, rather than the organisation's

---

[3] A paradigm is defined as a framework that contains the basic assumptions and ways of thinking that are accepted by an industry or a community (Merriam Webster, 1999).

needs (Boenigk & Scherhag, 2014). For example, donors may have needs to receive prompt and compelling communications from organisations, expressions of gratitude after they donate or good quality of service (Edworthy et al., 2022). Research shows that fundraisers who engage in relationship fundraising strategies secure larger and more frequent gifts because of repeat gifts from individual donors as well as long-term donor loyalty (Breeze, 2017). Most (80-95%) of the donations non-profit organisations receive are donated by a small percentage of their donor base (5-20%) (Lysakowski, 2013). And, as fewer and fewer small- and mid-range donors make donations (Rooney, 2018), more importance is placed on the donors who can make the most significant gifts (i.e., major donors).

Major gifts, especially large, transformational gifts, are typically the result of years-long interactions between fundraisers and major donors (Nyman et al., 2018). Fundraisers are trained to focus on the 'why of giving' far more than the 'how of giving' (Rosso, 2003). Thus, it is common practice for fundraisers to get donors to open up about their core values, fears, hopes and dreams (Hartsook & Sargeant, 2010) to understand what might inspire donors to make a significant donation. According to Rosso (2003), relationship fundraising is like a courtship. His advice to fundraisers is to treat it accordingly, "You will be required to discover what is important and what is repugnant. You will have to learn the history, including the unpleasant parts. You will have to uncover the afterlife hopes," (Rosso, 2003; p. 463). Yet in a typical courtship individuals take turns sharing information about themselves, rather than having one person do all the talking (the donors) and the other all the listening (presumably, the fundraiser). It should be noted here that comparing a fundraising relationship to a courtship is purely figurative and is meant to convey the depth of the information fundraisers should be seeking to

obtain and understand from their donors. There could, of course, be an ethical issue with fundraisers engaging in a romantic relationship with donors.

1.2.3 Theoretical and conceptual frameworks

Once a broad research topic was chosen (how fundraisers use self-disclosure in their interactions with major donors), the researcher sought to identify potential theoretical and conceptual frameworks to provide guidance and structure to the scientific inquiry (Grant & Osanloo, 2014). For the current research, the theoretical framework helped focus the literature review and guided the research design, especially how the vignettes were used in the cross-sectional survey. Two relevant conceptual framework elements were also identified. Conceptual framework elements are derived from the theoretical framework and identify core concepts and key theoretical principles that help explain concepts and how they relate to each other (Grant & Osanloo, 2014).

Social penetration theory (Altman & Taylor, 1973) forms the theoretical basis for the current research project. It is a foundational theory in the study of relationship development and explains the importance of self-disclosure in developing and maintaining relationships (Pennington, 2021). The dominant metaphor in social penetration theory is the onion, which provides a visual representation of how individuals typically share superficial, biographical personal information at the early stages of their relationship and 'peel away', like the layers of an onion, to reveal their core self, including more personal thoughts, beliefs and feelings as the relationship develops (Altman & Taylor, 1973).

Two other key concepts comprise the conceptual framework for the current research. These concepts are explored within social penetration theory (but were not part of the original theory) and are relevant to the current research. They are reciprocity and gender (Derlega et al., 2008; Reis & Shaver, 1988; Greene et al., 2006).

The reciprocal nature of self-disclosure has been studied as long as the topic itself (Jourard & Lasakow, 1958) and is a key concept in the study of relationship development (Reis & Shaver, 1988). Reciprocation in self-disclosure is what happens when information is exchanged by participants in an interaction (Derlega et al., 2008). For example, Person A discloses to Person B, then Person B discloses to Person A, and so on. This is an important concept to understand in the context of the current research because the fundraising literature concentrates almost exclusively on the donor's disclosures. Yet, some instances of fundraisers disclosing to donors has been acknowledged (Breeze, 2017; Breeze & Jollymore, 2017; Ragsdale, 1995; Shaker & Nelson, 2021).

Another important component of this research's conceptual framework is gender. Gender is particularly important to the current research because the fundraising profession is made up largely of female fundraisers (Breeze, 2017). The current research responds to a call by Dale and Breeze (2022) for additional research in the nonprofit industry that investigates the "workplace experiences and consequences of characteristics" (p. 25), such as gender.

Gender differences, defined as the socially constructed characteristics of women and men – such as norms, roles, and behaviour expectations – have also been widely studied in the self-

disclosure literature (Shaffer et al., 1992), with a bulk of the research conducted between the late 1970s to the late 1990s. In this body of research, small gender differences were found, with women disclosing more than men. For example, in their 1992 meta-analysis of more than 200 self-disclosure studies, Dindia and Allen point out nuances for the found gender differences, including the gender makeup of the disclosing pair (i.e., woman/woman, woman/man, man/woman), the situation in which the disclosure occurs, as well as the type of relationship (family member, friend, co-worker) the disclosers have. Gender differences in this early research are attributed to men's role in society, which is described as less conducive to self-disclosure because men are more likely to be socialized to be tough, inexpressive, and unfeeling (Dindia & Canary, 1993). Meanwhile, in this body of research, self-disclosure was associated with feminine behaviour because femininity is stereotypically defined by warmth and expressiveness, while masculinity is defined by traits like dominance and a lack of emotion (Dindia & Allen, 1992). There is evidence that gender roles have changed in the past 30 years (Ellemers, 2018), however, more contemporary research investigating gender differences in self-disclosure remains inconclusive. For example, Marshall (2008) found equally low levels of self-disclosure between women and men and Carbone et al., (2021) found that men and women both disclose the same amount of positive information, however, men are less likely to disclose negative information. In the current research, gender is explored for two reasons. First, to answer the call for more gender-specific fundraising research and to hopefully achieve a deeper understanding of the potentially unique impact of female fundraisers' disclosure on fundraising relationships. Second, to add to the body of knowledge related to gender differences in self-disclosure.

The next section provides an overview of what is already known about the research topic from the literature, a discussion of the gaps that were found, and a statement of the problem that the current research attempted to address.

1.3 Critical evaluation of the literature

Using the chosen theoretical and conceptual frameworks, the researcher conducted a multidisciplinary review of the relevant literature within the fields of fundraising, social psychology, and marketing. These disciplines were chosen because many of the models, ideas and strategies that dominate fundraising research and industry practices stem from social psychology and marketing concepts (Sargeant & Shang, 2010). This section first provides a critically evaluative summary of the literature and then introduces and further analyses each research gap.

The actors involved in major gift fundraising relationships (i.e., major donors and fundraisers) and the context in which they interact (i.e., relationship building as part of the fundraising process) are characterised by aspects that seem to encourage self-disclosure. For example, major donors typically have long-term, ongoing, face-to-face interactions with fundraisers, including during social functions that are unrelated to the "business" of fundraising (Schervish, 2005); while fundraisers are adept communicators with high emotional intelligence (Breeze, 2017) who are able to create comfortable, natural conversations with donors (Nyman et al., 2018), much like they would have with friends or family (Alborough, 2017). Training for fundraisers, including contemporary relationship development models, emphasise that fundraisers should build "real"

relationships with donors, and develop genuine, authentic connections (McLoughlin, 2017),

however, these trainings and models do not take into consideration how other personal

(Carpenter & Greene, 2015) and professional (Koponen & Julkunen, 2022) relationships are

developed: through self-disclosure. An analysis of social psychology and marketing literature

finds that self-disclosure helps relationships begin and contributes to how they are strengthened

over time (Altman & Taylor, 1973; Berg, 1987; Dindia et al.,1997; Sprecher & Hendrick, 2004;

Greene et al., 2006; Carpenter & Greene, 2015; Haytko, 2004; Koponen & Julkunen, 2022). For

example, self-disclosure creates positive interactions that encourage future interactions (Sprecher

et al., 2013), sets relational expectations about how open the relationship will be and what type

of and how much information will be shared (Bruk et al., 2018), gives conversation partners and

opportunity to demonstrate support and care for the other person by listening intently and

validating their life experiences (Slepian & Moulton-Tetlock, 2019). Self-disclosure helps

relationships progress and grow so that the relationship partners trust each other and are

committed to continuing the relationship (Kardas et al., 2022).

However, a thorough review of the literature identified three primary research gaps which

indicated a need for the current research. The first gap was that fundraisers are understudied, and

little is known about how they interact with donors. Fundraisers' role in the fundraising process

has largely been ignored in the literature (Breeze, 2017). The second gap is that although the

social psychology and marketing literature suggest that interpersonal aspects of relationship-

building are important to understand, they have received little attention in a fundraising context.

Self-disclosure has been acknowledged as occurring in fundraising relationships, however, it has

not been intentionally studied as a possible relationship development strategy. This is a

significant gap considering the importance of fundraisers building relationships with donors and the potential impact that stronger donor relationships could have on the amount of philanthropic support organisations receive. Finally, although self-disclosure seems to benefit marketing relationships (i.e., between buyers and sellers) (Haytko, 2004), the predictive power of self-disclosure content in a professional setting has not been studied. The current research will investigate the whether the content of a fundraiser's self-disclosure can predict the amount a donor intends to donate.

The first gap in the literature, that fundraising research typically does not investigate fundraisers' role in the fundraising process, has been well documented in recent years (Chapman et al., 2022; Alborough, 2019; Breeze, 2017). These studies indicate that fundraisers play an important role in securing gifts from major donors and call for more research and understanding. Fundraisers frequently interact with donors during visits, meetings, and social events (Hartsook & Sargeant, 2010) and act with significant agency during these opportunities (Alborough, 2019). Nyman et al., (2018) find that major gifts occur as a result of interactions between donors and fundraisers, so it is important to understand what happens during these interactions, in particular, when and whether fundraisers self-disclosure and how that impacts donors. Fundraisers may spend the majority of their time meeting one-on-one with donors (Hartsook & Sargeant, 2010). Yet, what fundraisers do during their interactions with donors has not been investigated.

The second gap identified during the literature review is that self-disclosure has not been studied in a fundraising context as a relationship development strategy. The interactions described above are presumably where the donor-fundraiser relationship is being developed and maintained.

However, practitioners have focused on donors' disclosures (Hartsook & Sargeant, 2010) while other research highlights the importance of fundraisers staying quiet and participating in active listening (Drollinger, 2018). Fundraisers do, or perhaps they should, disclose to donors. For example, one fundraiser who participated in a study by Breeze and Jollymore (2017) remarked:

> "Fundraisers must be willing to open up – we can't expect donors to talk about such personal issues as their money and what's happened in their life to make them care about a topic or a cause, unless we as the fundraiser reciprocate and also open up and share revealing stories about ourselves," (p. 4).

However, what is currently known about fundraisers' disclosure is simply that it occurs. A broader understanding of how fundraisers' self-disclosure impacts fundraising relationships, including its effects on donor giving decisions and perceptions, is needed.

The third gap in the literature is that the predictive power of self-disclosure had not been investigated in the self-disclosure literature. Most self-disclosure research designs are correlational or qualitative (Haytko, 2004). These methods are helpful for observing and measuring patterns between variables and broad exploration of topics, however, particularly in a professional setting, it is important to understand the potential for how or whether self-disclosure impacts behaviours, such as giving a gift. For example, in the marketing literature, in one of the few studies that specifically investigates self-disclosure, Haytko (2004) found that sales managers were able to accomplish taks more easily with clients with whom they have exchanged high levels of self-disclosure, however, the research did not link self-disclosure to the customer's purchasing decision. This is a gap the current research will address.

The dominance of relationship fundraising in the industry (Breeze, 2017), empirical research

demonstrating its success (Waters, 2008), and reports from fundraising leaders themselves

(Buteau et al., 2019) all indicate that professionals in the industry recognize the importance of

building relationships with donors. However, very little information exists about how these

relationships develop (Shaker & Nelson, 2021). The current research draws on knowledge from

other disciplines (social psychology and marketing) to examine how self-disclosure plays a role

in developing personal and professional relationships and attempts to apply that knowledge in a

fundraising setting.

1.4 Research aims and objectives

The overall aim of the study was to investigate what role fundraisers' self-disclosure plays in

fundraiser-major donor interactions.

The research aims were achieved using a sequential explanatory mixed-methods approach—a

quantitative cross-sectional survey distributed to one institution of higher education located in

the Midwest United States, followed by a series of 20 qualitative semi-structured interviews

with U.S. major gift fundraisers working in higher education. For the quantitative phase (Phase

1), the research objectives were:

1. To determine whether the content of a fundraiser's self-disclosure predict a donor's

     giving intention.

a. To determine whether the results of objective 1 are different for male and female fundraisers.

2. To investigate the relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents. Is there a "ripple effect"?

3. To determine whether variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention.

The non-significant results of the cross-sectional survey in the first phase were unexpected. Therefore, the researcher determined that a follow-up, qualitative research phase would be necessary to provide additional clarity and explanation to address the research aims. Mixed methods research designs that begin with quantitative data collected followed by qualitative data collection are called sequential explanatory design (Creswell & Plano Clark, 2018). This design is helpful when the researcher needs qualitative data to explain significant or nonsignificant results, outliers, or surprising findings from the quantitative data. Thus, the researcher followed Creswell and Plano Clark's (2018) recommendation that the objectives for the qualitative phase be developed separate from and after data analysis from Phase 1 (quantitative phase) was complete.

The second phase of the research consisted of semi-structured interviews. An interview protocol and the qualitative data analysis process was informed by the results of the quantitative phase (Creswell & Plano Clark, 2018). Thus, the objectives for Phase 2 were:

4. To investigate fundraisers' lived experiences utilizing self-disclosure during interactions with major donors.

5. To understand how fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions.

6. To describe whether the lived experiences and perceptions of male and female fundraisers differ.

The following section outlines the chapters that are contained within this dissertation.

1.5 Organisation of Chapters

This dissertation contains six chapters, beginning with an introduction establishes the context and importance of the research topic. Chapter 2 introduces the unique characteristics of major donors and major gift fundraisers which seem to encourage self-disclosure and examines the environment in which fundraising relationships develop and how they are connected to self-disclosure. Next, fundraising relationship development models are analysed, including their connections to relationship development techniques from social psychology and marketing. The chapter concludes with an evaluation of the importance of interpersonal aspects of relationship development in personal and professional relationships and a discussion of the gaps identified, and series of hypotheses drawn from the literature. Chapter 3 justifies the choice for a sequential explanatory mixed-methods approach to answering the research aims. Chapter 4 explains a need for an additional phase of research discusses results from both phases. Chapter 5 discusses the findings in detail and draws together the findings from Phase 1 and Phase 2 and creates linkages

to existing research. Chapter 6 concludes with a discussion of the current research's contribution to knowledge, implications for practice, suggestions for additional research opportunities and finally, the limitations of the current research.

Chapter 2: Literature Review

2.1 Introduction

This chapter reviews and critically evaluates existing literature from fundraising, social psychology, and marketing disciplines. The purpose of this literature review was to develop a framework to help address the overarching research aim to investigate what role fundraisers' self-disclosure plays in fundraiser-major donor interactions.

The literature review is divided into three sections. The first section reviews what is known about major gift fundraising, providing context for the current research. The characteristics of major donors and fundraisers are reviewed next because they are subjects of interest in the current research.

The next section describes what is known about relationships in fundraising. Relationships are critical to major gift fundraising (Breeze & Jollymore, 2017) and building relationships with donors – not asking for money, as many people assume – is the primary job responsibility of major gift fundraisers (Hartsook & Sargeant, 2010). The section begins with a review of early fundraising relationship development models and analyses the shift in fundraising strategies that came as a result of the current dominant fundraising paradigm, relationship fundraising (Breeze, 2017). Relationship fundraising, which focuses on meeting donor's, rather than the organization's, needs as well as maximizing the lifetime value of donors, represented a significant shift in the way fundraisers interact with major donors. More contemporary

relationship development models, which draw on relationship fundraising strategies, are also reviewed and critiqued.

The final section introduces self-disclosures as a relationship development tool. One of the most important ways individuals build relationships with others, like friends, colleagues, and romantic partners, is through self-disclosure (Greene et al., 2006). For the current research, self-disclosure is defined as a voluntary act whereby individuals reveal information, thoughts, and feelings about themselves to at least one other person during an interaction (Greene et al., 2006). It is in this process of sharing information with others that relationships are sometimes created. "Relationships are often born when conversation partners discover shared feelings about something: when, for instance, they realize that they both love Dali, abhor Broadway musicals or are passionate about animal welfare," (Rossignac-Milon & Higgins, 2018, p. 66). In fact, self-disclosure is one of, if not <u>the</u> most important aspects, of developing and maintaining relationships with others (Reis & Shaver, 1988) because self-disclosures help people feel closer to one another, help understand each other better and cooperate more easily (Haytko, 2004). Fundraisers work to develop genuine relationships with major donors that mimic their relationships with their friends and colleagues (Alborough, 2017), however, self-disclosure has not been studied as an aspect of the fundraising relationship development process.

Two dominant theories that are used in the field of social psychology to study self-disclosure as part of the relationship development process are critically reviewed: social exchange theory (Homans, 1958), and social penetration theory (Altman & Taylor, 1973). These theories are described and critically evaluated, and a justification for the chosen theoretical framework is

provided. A critical evaluation and interdisciplinary review of research on how individuals in personal and professional relationships interact and share information with each other, including self-disclosure, during the relationship development process is provided.

The chapter concludes with a summary of the literature that describes opportunities for the current research and presents the hypotheses that will be used during the quantitative Phase 1 research.

2.2 Fundraising

The following section provides context for the current research through a comprehensive and critical analysis of key fundraising concepts, including characteristics of major donors and fundraisers.

2.2.1 Major donors

Major donors are individuals who make significant contributions to non-profit organisations that are larger than what the organisation typically receives (Sargeant & Shang, 2010). Major gifts, including legacy or estate gifts, are contributions made by major donors and usually make up most of the funding a non-profit raises every year (Weinstein & Barden, 2017). Because of the significant impact their giving can have on an organization, major donors, and the major gifts they provide, a primary concern for non-profit leaders is building and maintaining relationships with major donors (Buteau et al., 2019).

There is no one clear definition of a major donor. Rather, the term 'major donor' is relative to the average donation amount a non-profit organisation raises each year (Sargeant & Shang, 2010). For larger organisations who secure multiple contributions of $1 million or more every year, an individual who donates $1,000 may not be considered a major donor. However, at a smaller organisation that raises $100,000 every year, that same $1,000 contribution could be considered a major gift. In summary, the definition of who major donors are depends on the organisations they support. In the academic fundraising literature, major donors have frequently been defined as individuals who have given a one-time gift of $10,000 or more (Prince & File, 1995; Waters, 2008; Waters, 2011), thus this is the definition used for the current research.

Non-profit organisations implement different fundraising strategies for the different donors they are targeting, and the type of support being solicited (Conley & Shaker, 2021). In the U.S., individual donors who make smaller, once per year contributions, are typically referred to as annual donors (Nwakpuda, 2020). (However, in other countries these donors may be referred to as regular, mass or low-level donors.) Fundraising strategies for annual donors include mass mailings or emails, phonathons, and event attendance (Tempel, 2010). Annual donors receive mass communications from organisations in which everyone receives the same or a similar message or appeal (Sargeant & Shang, 2010). A description of annual donors is provided here for context and contrast to major donors. As annual donors are not a focus of the current research, further in-depth discussion of annual donors is not included in the review of the literature.

In contrast to annual donors, major donors typically receive personalized, one-on-one communication and direct, face-to-face attention from the non-profit organisations they support (Conley & Shaker, 2021). For example, annual donors may receive an email blast inviting them to attend a homecoming reunion event, while a major donor might receive an invitation to the same event, handwritten on expensive stationery that is delivered by a fundraiser during a face-to-face meeting. This example illustrates how non-profit organisations dedicate significant time and resources (the expensive stationery and the fundraiser's time to deliver the invitation and meet with the donor in person) to communicate and interact with major donors. Organisations do so because of the potential return on that investment in the form of a major gift (Breeze, 2017).

Although securing major gifts and understanding major donors is a significant concern for non-profit organizations (Buteau et al., 2019), surprisingly few empirical studies focus on major donors specifically (Breeze, 2021). Much of the knowledge base related to major donors comes from the quantitative analysis of large surveys such as the US Trust study of High Net-Worth Philanthropy (Osili et al., 2019), and secondary analysis techniques, which utilize information about large donations that are announced in press releases or media articles (Breeze, 2021). Breeze (2021) points out that often proxies like financial advisors and wealth managers are interviewed and asked to speak for the donors they represent. As evidence of the paucity of research on major donors, Breeze (2021) identified only four empirical studies in which major donors were interviewed directly by researchers (Breeze, 2021). A fifth study (Shaker and Nelson, 2021) was subsequently published.

An analysis of what is known about major donors, including academic and practitioner sources, identified five unique characteristics of major donors that are relevant to the current research. First, major donors tend to have ongoing, long-term relationships with the organisations they support. Second, major donors have personalized, one-on-one interactions with fundraising staff and leaders. Third, major donors tend to be engaged in the work of the organisations they support in significant ways. Fourth, major donors develop strong feelings for the organisations they support that are unlike and different from what annual donors experience. And finally, major donors commonly divulge deeply personal information during the fundraising process.

The first distinction, that major donors typically have long-lasting, ongoing relationships with non-profit organisations and the fundraisers who represent them, is well documented in the academic (Breeze, 2017; Nyman et al., 2018; McDonald et al., 2011) and practitioner literature (Weinstein & Barden, 2017; Harstook & Sargeant, 2010; Alexrod, 2004). By focusing on how fundraisers should make major donors feel, rather than what fundraisers should do, fundraisers work to convince or encourage donors to continue to interact and hopefully give. For example, fundraisers work to create ever-deepening relationships with donors by making donors feel as though they are true friends or part of the organisation's family (Axelrod, 2004). Major donors are treated as organizational "insiders" so that they feel as though they are personally invested in the cause (Hartsook & Sargeant, 2010), rather than just a passive supporter that sends in a check. As a result of repeat positive interactions and experiences, major donors feel emotionally connected to the non-profit organizations they support, which deepen their ties and sometimes inspire them to give more (Axelrod, 2004). In the case of donors who leave a gift to an organisation in their will, sometimes they and their families may continue to receive ongoing

attention from fundraisers and an organisation's leaders years after their gift has been made (Sargeant & Shang, 2010), emphasising the long-term nature of major gift relationships.

Empirical research confirms that major donors maintain ongoing relationships with the organizations they support (Breeze, 2017). For example, Nyman et al., (2018) find that major gifts most often occur after donors and fundraisers interact for five to seven years and, that donors expect their interactions with fundraisers to be personally satisfying and meaningful. The long-term nature of major donor relationships is extremely important for non-profit organisations because the cost of acquiring new donors is significantly more than retaining existing donors (Sargeant & Woodliffe, 2007). In addition, ongoing relationships provide frequent opportunities for donors to interact with fundraisers, including instances in which donors (or fundraisers) may introduce their friends and family members, reveal personal interests, or discuss daily life happenings.

Second, major donors interact with fundraisers in unique ways that emphasize personal, genuine connection. Annual donors may never have a face-to-face conversation with a fundraiser, whereas most major donors do (Hartsook & Sargeant, 2010). Major donors are typically cultivated by fundraisers over a series of in-person interactions (Weinstein & Barden, 2017), meeting regularly, sometimes for years (Perry & Schreifels, 2014) before a donor makes a significant contribution. These interactions are intentionally crafted to make donors feel special, appreciated and seen (Shaker & Nelson, 2021). The significance of these personal interactions cannot be understated because they are the backdrop to many donors' philanthropic giving, and they are part of the social context that helps explain why and how donors make their giving

decisions. Major donors interact with fundraisers and the leaders of the organisations they support. For example, they share meals and attend sporting and other cultural events together (Temple, 2010), and often major donors' social lives revolve around events associated with the organisations they support (i.e., church functions, university sporting events, fundraising galas) (Schervish, 2005). Indeed, major donors expect fundraisers to be able to connect with them on a personal level, over the long term (McDonald et al., 2011). When donors' relational expectations are met, they tend to continue to support the causes they are passionate about year after year (Breeze, 2017). Major donors invite fundraisers into their homes and place of business and introduce fundraisers to their families (Weinstein & Barden, 2017). These experiences provide fundraisers and donors the opportunity to have shared experiences and to get to know each other on a more intimate level.

Another distinction of major donors is that they are often asked to become directly involved in the work of the organisation (i.e., become a trustee, chair an event, serve on a committee) (Sargeant & Shang, 2010), and expect to co-create their gifts to the non-profit organisations they support (Schervish, 2005). As "architects" of the programmes or services they support, major donors work together with fundraisers and other leadership to shape the future work of the organization (Schervish, 2005). This deep involvement helps major donors develop strong connections to what the organisation is trying to accomplish and a broad understanding of the organisation's needs (Axelrod, 2004). Major donors, who may have significant professional experience or community knowledge and connections, can offer opinions and solutions to challenges the organisation may be facing (Perry & Schreifels, 2014). Asking donors for their advice, input and recommendations also gives fundraisers an opportunity to demonstrate care for

who the donor is as an individual (Madden et al., 2022) and recognize donor's skills and expertise (Cluff, 2009), thus, meeting donors' emotional needs by celebrating their competency and achievements. Involving major donors in the work of the organizations helps create a sense of shared purpose and interest (Temple, 2010) and gives fundraisers additional opportunities to interact with donors that are unrelated to soliciting a gift (Madden et al., 2022). These circumstances serve as part of the social framework for the interpersonal aspects of the major-donor/fundraiser relationship that are rarely studied or taken into consideration in the literature.

As a result of the long-term, personal, highly involved nature of major donors' relationships with the causes and organizations they support, major donors often experience unique feelings toward them. Three concepts which are relevant to the current research are analysed next.

Commitment

Commitment is a construct that is important in interpersonal relationships (Wiselquist et al, 1999). Moreso than other donors, major donors develop deep feelings of commitment to the organisations they support, and presumably the organisation's representatives (i.e., fundraisers). For example, Waters (2008, 2011) found that major donors have deeper and stronger feelings of commitment to the organisations they support than annual donors. In his research, commitment indicates that the relationship is worthy of the sacrifices (time, attention, money) it takes to maintain and there is an intention to maintain the relationship (Waters, 2008). Commitment is important to understand in fundraising because it is much more efficient to keep existing donors rather than constantly acquiring new ones (Sargeant & Woodliffe, 2005). Waters finds that long-

term donors are committed to the organisations they support, and to seeing its programs succeed (Waters, 2008). It is important that donors trust the organisations they support to use their donations wisely, make a positive impact on beneficiaries, and communicate effectively; however, those feelings of trust do not lead directly to donors' giving behaviour (Sargeant et al., 2006). Rather, donors' giving is strengthened by and dependent upon the donors' feelings of commitment (Sargeant et al., 2006).

In addition to being committed to an organisation, donors can also be committed to the fundraisers with which they work. Thus, commitment has also been found to be important in a major giving context. For example, Shaker and Nelson (2021) find that successful major donor-fundraiser relationships are characterised by a dedication to the cause, but also to one another and their personal relationship. In their research, successful fundraiser-major donor relationships were characterised by regular interactions, comfort and security, as well as a willingness to invest in the relationship (p. 4) and meet each other's personal needs (Shaker & Nelson, 2021). According to Knowles and Gomes (2009), fundraisers can build donors' commitment by developing a deep understanding of donors' attitudes, beliefs, emotions, values, and motivations (p. 397) and engaging with them in social settings. Thus, fundraisers must get donors to open up and reveal personal details about their lives and be constantly searching for ways to tie this information back to the institution to build the donor's desire (p. 397). The current research will focus on donors' feelings of commitment to both the fundraiser and the organisation. It is predicted that fundraisers' self-disclosure will positively impact donors' feelings of commitment toward the fundraiser and the organisation, and also that donors' commitment will help explain, or mediate, the relationships between fundraisers' self-disclosure and their giving intention.

Communal Strength

Major donors (versus annual donors) have more communal relationships with the organisations they support (Waters, 2008). Communal relationships are characterized by wanting to help others out of a concern for their wellbeing rather than because of any benefits that might be provided (Waters, 2008). In contrast, exchange relationships are those in which "one party gives benefits to the other only because the other has provided benefits in the past or is expected to do so in the future" (Hon and Grunig, 1999, p. 3). In communal relationships, both people provide benefits to each other (Waters, 2008); which in a fundraising context, could look like the fundraiser providing timely information and opportunities for donors to understand the impact of their donations, while donors are providing their time and financial support. Communal fundraising relationships could also look like fundraisers and donors providing emotional support during the self-disclosure process. For example, when someone arrives late to a meeting because of car trouble or announces that they are unavailable to meet because of having to care for a sick family member.

Communal strength measures how communal a relationship is (Mills et al., 2004). Specifically, it calculates the extent to which individuals feel responsible for another, the cost individuals are willing to incur to meet the needs of the other, as well as how much distress individuals would feel if they could not meet the needs of the other (Mills et al., 2004). At least one past series of studies provides support for a relationship between communal strength and prosocial behaviour. Mills et al., (2004, study 4) found that communal strength predicted allocation of benefits to peers. Participants chose a more interesting and desirable task (versus less desirable task) for a

person with whom they felt high (versus low) communal strength. Subsequent studies showed that high communal strength predicted the amount of self-reported help given to a friend, with friends with high communal strength receiving more instances of help than those with low communal strength, (Mills, et. al., 2004, study 5).

Past research confirms that communal fundraising relationship exist, in which both fundraisers and donors are intrinsically motivated to continue their relationship with each other, (Shaker & Nelson, 2021). These communal major gift relationships were compared to other communal relationships that donors or fundraisers might have with a close friend, mentor, or family member (Shaker & Nelson, 2021, p. 11), relationships that typically contain the most significant amount of sacrifice.

In the context of the current research, communal strength is an interesting construct to investigate because donors sacrifice financially to meet the needs of the organizations they support, and major donors arguably sacrifice more because of the additional investments of time (long-term, ongoing relationships), emotions (highly personal, social interactions) and expertise (involvement in the work of the organization). In the current research, it is predicted that communal strength will help explain, or mediate, the relationship between a fundraiser's self-disclosure and a donor's giving intention because donors in the current research with high communal strength should have a greater desire to meet the organization's needs. Furthermore, the current research is interested in whether a fundraiser's self-disclosure will affect not only feelings of communal strength toward the fundraisers, but also for the organisations they represent.

Connection

Connection, defined as a feeling of emotional closeness (Holt-Lunstad, 2018), is frequently

mentioned in the fundraising literature. Donors often feel extremely connected to the

organizations they support (Axelrod, 2004). They are passionate supporters and want to

understand an organisation's mission, needs how they can contribute or make an impact

(Axelrod, 2004). Donors may feel especially linked to certain organizations, such as institutions

of higher education, so much so that their identity is connected to the organization itself

(Drezner, 2018). Fundraisers are encouraged to develop connections with the donors with whom

they work. For example, fundraisers should want to genuinely know what donors think and feel,

appreciate their opinions, and understand how they feel about core issues related to the

organisation's work and mission (Axelrod, 2004).

In addition to feeling connected to the work of the organisations they support, major donors and

fundraisers sometimes feel emotionally connected to each other, especially when they have

worked together for a long time and developed a level of comfort in their interactions (Shaker &

Nelson, 2021). For example, donors express wanting to help the fundraisers personally and

professionally, by making financial contributions and helping the fundraiser achieve his/her goal

(Shaker & Nelson, 2021, p. 11). In her interviews with 28 major donors to higher education

institutions in Canada, Caton (1999) found that major donors feel a familial connection to the

universities they support. Their giving helps donors relive good times and celebrate the

friendships that were developed during a significant moment in their lives (Caton, 1999).

Feelings of connection are important to understand in philanthropic relationships because connection helps nurture healthy relationships and the desire to connect with others is recognised as a fundamental human need (Baumeister & Leary, 1995). Close connections with others help individuals deal with stress and feel a sense of security (Wiseman, 2017). In addition, when individuals are connected to others, they are able to process and explore the events that occur in their lives, push themselves to understand and reach their highest potential, and strive for goals that they might not otherwise consider (Pietromonaco & Collins, 2017). There are relational benefits to being connected with others in professional, as well as personal, relationships. For example, in the workplace, connected relationships with co-workers promote collaboration and knowledge-sharing (Holt-Lunstad, 2018). Like in fundraising (Shaker & Nelson, 2021), in business, customers (donors) can develop a connection to the salespeople (fundraisers) with whom they work (Baumann & Meunier-FitzHugh, 2015). Customers can also feel an emotional connection to businesses and brands (Swaminathan et al., 2007), however no known study has investigated whether self-disclosure drives these feelings of connection. Thus, the curent research predicts that donors will feel more connected to fundraisers who self-disclose, and as a result of a "ripple effect", they will feel more connected to the organisation the fundraiser represents. In the current research it is predicted that this feeling of connection will explain the relationship between the fundraiser's self-disclosure and the donor's giving intention.

Moral Identity

Social identities, which can be thought of as the way individuals define themselves, guide the way individuals processes social experiences and influence their behaviour (Markus, 1977). Individuals may have many different social identities (Kang & Bodenhausen, 2015). For example, individuals may define themselves based on their gender, religion, race or ethnicity, and these identities may shape their thoughts and decisions. One social identity of interest in the current research is moral identity. Grounded in social identity theory and self-concept theory, moral identity is organized around individuals' moral beliefs (Aquino & Reed, 2002). People who have high moral identity associate moral traits as being central to their self-concept. According to Erikson (1964), when a self-concept is salient to an individual, that individual is motivated to act in a way that is consistent with that self-concept. In this way an individual's self-concept can influence their perceptions, cognitions, and behaviour. The current research will explore moral identity's relationship to fundraisers' self-disclosure and donors' giving.

Moral identity consists of private and a public-facing dimensions of the self (Aquino & Reed, 2002). Internalization is the internal, private dimension of the self, defined as the degree to which moral traits are central to one's self-concept, and symbolization is the public dimension, defined as the degree to which the traits reflect an individual's actions which are visible to others (Aquino & Reed, 2002). Moral identity is relevant to the current research because several studies have linked moral identity theory to helping behaviours. For example, Aquino and Reed (2002) found that individuals with high moral identity were more likely to have participated in volunteering or charitable activity than individuals with low moral identity. Similarly, Reed and

33

Aquino (2003) found that individuals with high internalization dimension of moral identity donated more money to help individuals in need. Moral identity can influence behaviour more strongly when it is central to an individual's self-concept (Aquino & Reed, 2002). For this reason, the current research project is interested in the internalization dimension of moral identity and does not investigate the symbolization dimension.

Some gender differences have been found in the way individuals experience moral identity. For example, Kennedy, Kray and Ku (2017) found that women more strongly internalize moral traits compared to men, and moral identity affects men's and women's behaviour differently (Kennedy, Kray & Ku, 2017; Winterich, Mittal & Ross, 2009). These differences may be because an individual's sense of moral identity can be tied up in relational concerns, especially for women, who tend to be more relational than men (Shang, et. al, 2020). For example, women both feel a stronger connection to others and learn that being moral helps them build relationships with others (Kennedy, Kray & Ku, 2017). In one study (Shang et al., 2020), women's feelings of connection to others increased their internalised moral identity and led them to donate more money. However, Shang et al.'s (2020) research was limited in that investigated annual donors. The current research will contribute to knowledge by investigating moral identity in a major giving fundraising context, which is more relational than annual giving,

The fifth and final characteristic of major donors that is relevant to the current research is their tendency to divulge deeply personal information to fundraisers (Sargeant & Shang, 2010), to discuss their values and legacy (Weinstein & Barden, 2017), and to develop close relationships

with the fundraisers with whom they work (Sargeant & Shang, 2010). Major donors divulge personal information which helps fundraisers make connections between the donor's interests and passions and the needs of the organisation the fundraiser represents (Temple, 2010). To collect pertinent information, fundraisers are encouraged to ask open ended questions and spend more time listening than talking with donors (Hartsook & Sargeant, 2010). Thus, the literature indicates that major donors speak openly and freely during interactions with fundraisers, sharing deeply personal information, but focuses on the instrumental nature of the information that is shared. That is, according to the literature the purpose of donors' disclosures is entirely to help fundraisers craft a compelling solicitation, and says little about the interpersonal aspects of information sharing, which can include the catharsis of verbally processing life experiences, or the comfort and joy of being known by another person on an interpersonal level.

Examples from both the academic (Breeze, 2017; Shaker & Nelson, 2021) and practitioner (Temple, 2010) fundraising literature provide evidence of fundraisers helping donors explore topics such as personal values, wanting to be remembered, and wanting to recognize or honour individuals who helped donors become successful. This information suggests that fundraisers play a role in helping donors craft their moral identities by giving donors an opportunity to reflect on their life experiences, accomplishments, and goals. Thus, the literature acknowledges that donors do – and should – discuss private details of their life in a way that seems to emphasise communication from donors, with them divulging deeply personal information and experiencing "self-transformation" (Castillo & Jones, 2020), seemingly without the fundraiser contributing any personal information to the relationship. This lop-sided nature of information sharing contradicts one's experiences in everyday life, and what is known about how

relationships develop, for example, from the fields of social psychology (Cozby, 1973; Greene et al., 2006; Sprecher et al., 2013) and marketing (Bantham et al., 2003; Haytko, 2004).

To summarise the current section, key characteristics of major donors are evaluated in the context of the current research in Table 2.1.

Table 2.1: Key characteristics of major donors

Characteristic of major donors	Description	Citation	Relevance to current research
Long-term relationships	Major donors interact for several years before a major gift is made or solicited.	Nyman et al., 2018	Repeated interactions give major donors opportunities for frequent discussions; expectations to see each other regularly and spend time together
	Some major donors who leave a legacy gift to an organisation in their will may continue to receive ongoing attention from fundraisers and an organisation's leaders years after their gift has been made, indicating the long-term nature of major gift relationships.	Sargeant & Shang, 2010	
Personalized, face-to-face interactions	Major donors and fundraisers share meals and attend social events together.	Temple, 2010	Interactions reflect donors' personality and preferences and give the fundraiser an opportunity to demonstrate they know the donor personally, as an individual
	Fundraisers craft interactions that reflect donors' preferences and indicate the donors is known on a personal level.	Breeze, 2017	
Directly involved in the organization's work	Major donors want to co-create their gifts to non-profit organizations; want to an expect to work hand-in-hand with fundraisers and leadership.	Schervish, 2005	Involving donors in the work of the organization provides an opportunity to establish shared values and experiences.
Experience unique feelings	Major donors experience relational feelings of warmth and	Caton, 1999	Strong positive feelings help create an environment that is

	comfort during the fundraising experience.		conducive to sharing deeply personal information (Laurenceau et al., 2004).
Divulge personal information	Major donors discuss values, pivotal life experiences, and their life's legacy with fundraisers during the fundraising process.	Sargeant & Shang, 2010	Fundraisers are encouraged to ask open ended questions and spend more time listening than talking with donors (Hartsook & Sargeant, 2010), which indicates that major donors disclose frequently during these interactions.

Source: Author's creation

The next section critically evaluates the body of knowledge regarding fundraisers.

2.2.2 Fundraisers

Historically, philanthropy has been described as 'a world of donors' (Dale & Breeze, 2021) with seldom mention of fundraisers and their work, despite fundraisers' proximity to and involvement with donors (Breeze, 2017). However, in recent years there has been an uptick in the number of researchers who are investigating fundraisers and their impact on charitable giving (e.g., Breeze, 2017; Shaker & Nathan, 2017; Alborough, 2019; Nyman et al., 2018). These researchers have highlighted a need for a deeper understanding of fundraisers in general and more specifically, fundraisers' role in securing major gifts.

There is a dearth of empirical research on fundraisers. As evidence, in developing their charitable triad theory, Chapman et al., (2022) conducted a systematic literature review of 1,337 interdisciplinary empirical fundraising articles published between 1980 and 2020 and found just 22 articles that investigated individual fundraisers. Only one of these 22 articles (Shaker & Nathan, 2017) focused on major gift fundraisers and was also from the disciplines included in this review (fundraising, social psychology, and marketing). The following section reviews the limited body of knowledge related to fundraisers, their skills, and characteristics more broadly (e.g., Drollinger, 2018) to provide information about who major gift fundraisers are and what they do.

No comprehensive list of major gift fundraising professionals exists (Breeze, 2017). However, samples from studies that investigate major gift fundraisers indicate they are a homogenous, highly educated and primarily female group (Breeze, 2017; Shaker & Nathan, 2017). Shaker and Nathan (2017), for example, surveyed members of fundraising professional associations to investigate the demographics of higher education fundraisers in the U.S. and the knowledge, skills, and personal characteristics necessary for fundraisers to be successful. Their sample was majority white (89%), contained a high number of individuals with a master's degree or higher (57%) and were majority female (68%) (Shaker & Nathan, 2017). Breeze's (2017) sample did not collect race or ethnicity data, however, showed similar findings for the other categories. Participants were once again very well educated (32% held a master's degree or higher) and mostly female (64%).

Understanding the characteristics of donors could help us learn more about how or whether those characteristics affect the social context in which fundraising occurs. In the current research, fundraiser gender is an important attribute to consider. Since the 1980s, fundraising as a profession has become dominated by women and women now make up a majority of the fundraising workforce (Dale & Breeze, 2021). The increase of women in fundraising has sometimes been attributed to women's stereotypically nurturing nature and their willingness to take on work that 'lacks recognition and culturally ascribed value' (Breeze, 2017 p. 68). In particular, major gift fundraising emphasizes characteristics typically ascribed to females, such as strong communication and interpersonal skills, caring for others, and building relationships (Dale & Breeze, 2021). Thus, fundraising researchers are being called on to include aspects of gender in their research designs (Dale & Breeze, 2021), a call which the current research attempts to answer.

Four characteristics of successful fundraisers relevant to the current research were identified during a review of the literature. They include fundraisers as good communicators, relationship builders, good listeners and emotionally intelligent individuals. The characteristics of fundraisers are analysed in Table 2.2.

Table 2.2. Characteristics of successful fundraisers

Characteristic	Description	Citation	Relevance to current research
Good communicator	Fundraisers are more talkative, less reserved, less likely to be quiet, are more likely to have an assertive personality, more outgoing or sociable and less likely to be shy in social settings than members of the general public.	Breeze, 2017	Fundraisers who can carry on interesting, engaging conversations with donors may have more occasions to have conversations with donors and possibly more opportunities to discuss personal information as a result.
	Fundraisers are socially curious individuals who possess a wide range of verbal skills.	Nagaraj, 2015	Fundraiser's communication skills may help with their social interactions with donors; and their verbal skills may include communicating personal information.
	Successful fundraisers possess an ability to communicate with others exceptionally well and are highly adept at developing 'close rapport' with donors through effective face-to-face interactions (p. 13).	Shaker and Nathan, 2017	Rapport is defined by a natural, easy flow of conversation (Shaker & Nathan, 2017) and includes individuals understanding each other, indicating that a mutuality and two-way connection is occurring.
Relationship builder	Authenticity is a key characteristic of successful fundraisers, evidenced by fundraisers who interact with donors as they would interact in other social situations, making donors feel comfortable and valued.	Breeze, 2017	Presents a need to understand fundraisers who are authentically open with donors and comfortable sharing lots of personal information. What are the risks or rewards?
	Successful fundraisers are adaptable and responsive to donor needs.	Worth and Asp, 1994	Some donors may prefer a relationship that involves more (or less) mutual self-disclosure. Indicates a need to understand whether fundraisers should attempt to meet this need.
	Successful fundraisers are caring, attentive to the needs of others and compassionate during their interactions with donors.	Shaker and Nathan, 2017	Fundraisers relationship building skills encourage frequent interactions and long-term relationships,

			during which self-disclosure is more likely to occur (Altman and Taylor, 1973).
Good listener	Listening skills are one of the most frequently identified skills possessed by successful fundraisers.	Shaker and Nathan, 2017	Good listening skills help fundraisers build long-term, open, trusting, and comfortable relationships conducive to sharing personal information.
	Active empathetic listening, including picking up on verbal and non-verbal clues, help fundraisers empathise with donors and help build trusting long-term relationship that can lead to higher levels of commitment to the organisation' (p. 39).	Drollinger, 2018	Research focuses on fundraisers as listeners without considering what they are contributing (i.e., disclosing) to the conversation. For example, in building relationships with major donors, fundraisers report that they initially skip over information about the organisation (Breeze & Jollymore, 2017), suggesting that their conversations focus on more personal aspects. This may require a fundraiser to not just listen to what donors share about themselves, but also to be prepared to respond to questions or offer up personal information about themselves, too. So far researchers have only studied one side of the equation.
Emotionally intelligent	Successful fundraisers possess 'uncommon' emotional intelligence and are extremely other-focused (p. xi).	Croteau and Smith, 2011	Fundraisers' emotional intelligence is important to understand in the context of the current research because emotional intelligence helps fundraisers understand how to react to donors' emotions (Breeze, 2017). It is possible that some donors will want fundraisers to respond to their personal expression of emotions with a personal expression of their own. If it is possible that some donors want fundraisers to disclose (or specifically ask donors to disclose) and fundraisers possess the emotional intelligence to decipher those cues, then it is likely that fundraisers are disclosing personal information

			to donors, indicating a need for more understanding about the effects of that disclosure.

Source: Author's creation

The unique skills and characteristics fundraisers possess help them effectively communicate their passion about the cause to inspire donors to make significant gifts (Shaker & Nathan, 2017). Successful fundraisers use their exceptional communication skills to convey their heartfelt support for the missions of the organisations they represent (Shaker & Nathan, 2017), which in turn also motivates some donors to give.

Because this and other (i.e., Alborough, 2019) research finds that fundraisers inspire donors' giving, and because donors likely feel extremely passionate about the missions of the organisations they support, in the current research it is expected that fundraisers' mission-related (versus mission-unrelated) disclosures will increase the amount donors intend to donate. An example of mission-related information in the context of higher education would be when university fundraisers share stories about their personal struggles as a first-generation college student. The current research will be the first known research to investigate the content of disclosed information to determine whether different type of disclosures have more of an impact than others, making an important contribution to the current field.

2.2.4 Section Summary

Section 2.2 reviews and critically evaluates literature related to major donors and major gift fundraisers.

Major donors engage with the non-profit organizations they support in unique ways that encourage long-term, ongoing interactions (Conley & Shaker, 2021). As they work with fundraisers to craft their donations to the organizations they support (Temple, 2010), major donors' lives often become woven into the fabric of the non-profit organization itself – through leadership work, like serving on a board or committee, or attending social events (Schervish, 2005). As a result of frequent interactions and shared experiences, major donors and fundraisers have regular opportunities to express care and concern for one another, get to know each other on a personal level and provide and receive genuine emotional support (Madden et al., 2022). However, a critical review of the literature reveals that major donors are studied infrequently in the empirical literature (Breeze, 2021) and most of what we know about donors is related to how generous they are (Alborough & Hansen, 2022) and is based on anecdotal information from practitioner sources (Breeze, 2017).

Successful fundraisers possess the skills to put their conversational partners at ease, communicate effectively and help create positive interactions (Shaker & Nathan, 2017) that encourage donor loyalty (Breeze, 2017). Fundraisers are encouraged to be authentic in their interactions with donors and create connections that mirror their relationships with friends and close others (Alborough, 2019), however, the literature does not consider what happens when fundraisers are genuinely more open and willing to share personal information with donors. Listening is a critical skill for fundraisers to possess (Drollinger, 2018) however, by emphasising fundraisers listening skills, the current body of knowledge is silent on the contributions that fundraisers make in conversations with donors and assumes that their interactions are focused on what the donor is communicating or strictly business. In addition, fundraisers possess

exceptional emotional intelligence (Croteau & Smith, 2011) and use it to meet donors' unspoken

needs. However, the literature does not investigate whether fundraisers should work to meet this

specific donor need or remain more reserved and professional.

The next section discusses the role of relationships in fundraising and how it has evolved over

the years.

2.3 Relationships in fundraising

Fundraising *is* building relationships (MacQuillin et al., 2016), and relationship building is

perhaps most important in major gift fundraising (Sargeant & Shang, 2010). Despite what some

people assume, the work of major gift fundraisers is about establishing and maintaining

relationships with donors – not asking for gifts (Hartsook & Sargeant, 2010). This section

critically evaluates existing relationship models that help instruct fundraisers on how to build

relationships with donors.

2.3.1 Early relationship development models

Relationship models provide a mechanism for explaining a specific process, such as the steps

individuals take to develop a relationship. Early popular fundraising relationship development

models, such as Smith's (1977) Five I's model and Dunlop's (1993) refinement of the Five I's

model, the Nurturing Fundraising Cycle, are descriptive in nature and identify, from the

fundraiser's perspective, the tasks that should be completed to secure a philanthropic gift. An

analysis of each is included in Table 2.4.

Table 2.3: Early relationship development models

Model	Process	*Evaluation of limitations
Cultivation of the Five Is (author: G.T. Buck Smith)	1.Identification 2. Interest 3. Information 4. Involvement 5. Investment	This model was created in 1977, thus might need to be updated or revisited based on current research and information; is untested and based on practitioner experience rather than empirical data. Identifies stages but does not explain *how* the relationship development process occurs.
Nurturing Fundraising Cycle (author: David Dunlop)	1.Identification 2. Information 3. Awareness 4. Understanding 5. Caring 6. Involvement 7. Commitment	The additions in this model reflect the change in the fundraising industry as more emphasis was placed on meeting donor needs and developing long-term relationships. However, this model is also practitioner-based and has not be tested empirically. Once again, the relationship stages are identified but there is no information about how fundraisers should move from one stage to the other.

Source: McLoughlin, 2017, *Author's creation

A strength of these early models is that they share similar frameworks and are consistent with

relationship development theories from social psychology (Worth, 2015). These models describe

donors becoming connected to and feeling deeply for the organisations and causes they support

(Smith, 1977, Dunlop, 1993). However, these models are limited in that they are drawn primarily

from the authors' personal experience rather than empirical knowledge. The anecdotal evidence

provided in descriptions of these early models provides fundraisers with practical advice for

when they should typically interact with major donors and what their general objectives should

be (i.e., provide information, increase awareness, determine interest), however, do not consider

how fundraisers should interact with donors, nor do they consider the reciprocal nature of donor-

fundraiser interactions (McLoughlin, 2017). The models focus exclusively on the professional strategies fundraisers should take to solicit a gift, but ignore the interpersonal aspects of the major donor/fundraiser relationship and do not reflect major donors' desire to have a close, personal relationship with the fundraisers with whom they work (McDonald et al., 2011). Professional fundraisers may be left wondering what to say and when, and how those decisions will impact donors' decisions to give.

2.3.2 Relationship fundraising

Around the same time the Nurturing Fundraising Cycle (Dunlop, 1993) was being developed, a significant shift in the fundraising industry was occurring. A fundraising philosophy, called relationship fundraising, was born in the 1990s as the non-profit marketplace became more competitive and increasingly crowded with non-profit organisations (Skarmeas & Shabbir, 2011). Relationship fundraising techniques mirror relationship marketing techniques from the for-profit sector, which emphasize building long-term relationships with customers, meeting customer needs and improving a buying experience for customers that encourages repeat purchases and continued business (Crosby et al., 1990). The relationship fundraising approach also aligns with broader relationship development strategies found throughout social psychology literature associated with developing personal friendships (Greene et al., 2006) and even romantic relationships (Rosen et al., 2008).

Ken Burnett (1992) was the first fundraising professional to use the term relationship fundraising, thus he is credited with coining the term (Sargeant, 2001). Burnett (2002) defines

relationship fundraising as a way of treating donors with personalized strategies, attention, and appreciation to achieve repeat gifts and long-term donor loyalty. Relationship fundraising moves away from the transactional nature of fundraising which focuses on the needs of the organisation and the resources it requires, and instead puts the needs of the donor first (Sargeant & Shang, 2010). Fundraisers who engage in relationship fundraising strategies work to develop genuine connections with donors who they view as unique individuals with distinct needs, rather than simply a means to achieve fundraising goals (Burnett, 2002).

Relationship fundraising is now thought to be the dominant paradigm in the industry (Sargeant & Shang, 2010), and the number one way that fundraisers build relationships with donors. Tempel (2010) states there is nothing more important to the fundraising profession than the concept of relationship fundraising. In using relationship fundraising techniques, fundraisers are encouraged to build ever-deepening, genuine relationships with their donors (Burnett, 2002; Burk, 2003), establish rapport (Weinstein & Barden, 2017), and even love their donors (Pitman, 2008). Relationship fundraising has likely endured for the past 30 years because it appears to work in practice, though without much empirical support. Organizations that deploy relationship fundraising strategies usually raise more money (Breeze, 2017) and donors describe more positive and meaningful giving experiences (Shaker & Nathan, 2017).

Donors and fundraisers may develop a sense of closeness or a bond because of the emotional nature of fundraising work. For example, Rosso (2003) claims that many major donors "know how to accumulate means but not meaning," (p. 96). Fundraisers are encouraged to act as a sort of spiritual guide for donors, working to uncover donors' passions and elements of their core

selves, and to match these passions with the needs of the organisation (Hartsook & Sargeant, 2010). In this way, donors' meaning in life can be discovered through philanthropy (Rosso, 2003), and fundraisers use relationship fundraising strategies to facilitate this process. As mentioned in Section 2.2, donors and fundraisers engage in sometimes years-long discussions of dreams, values, family dynamics and personal legacy (Hartsook & Sargeant, 2010), and some donors and fundraisers become true friends, maintaining relationships long after the fundraiser stops working for the non-profit organisation.

Of course, there are ethical concerns related to fundraisers and donors developing too close a relationship. According to the Association of Fundraising Professionals Code of Ethics (2014), fundraisers should not exploit relationships with donors for their own gain, but rather keep the relationship focused on the donor and the organisation (Rosso, 2003). Fundraisers and donors' interactions and relationships are a result of the work of the non-profit organisation and fundraisers should be intentional about getting to know the donor for the express purpose of helping the organisations for which they work. Fundraisers should not personally benefit from their relationships with donors (i.e., accepting large gifts or personal favours). Therefore, it is important for fundraisers to understand how to build strong, close, deep relationships with donors while also maintaining ethical and professional standards. The current research will contribute to the body of knowledge regarding how close fundraising relationships develop.

2.3.3 Contemporary relationship models

More contemporary fundraising relationship models reflect the industry's emphasis on relationship fundraising. The models evaluated in this section include more reference to the psychological benefits that donors receive during the fundraising process (McLoughlin, 2017), are more data-driven and are designed specifically for major gift fundraising. The models are critically evaluated in Table 2.5.

Table 2.4: Contemporary relationship development models

Model	Description	Critical evaluation
AID-TIM model (Knowles & Gomez, 2009)	AID-TIM is based on existing marketing models and describes the steps that are taken to develop a major gift relationship, including awareness and understanding, interest and involvement, desire to help, trial gift, information about what and how to give, and major gift action.	This model is helpful in that it is specific to major gift fundraising, incorporates relationship-building elements and acknowledges fundraisers' role in motivating donors' giving decisions (Knowles & Gomes, 2009). However, it does not consider the interpersonal aspects of major donor-fundraiser relationships.
Advantage, Meaning, Pleasure model (McLoughlin, 2017)	McLoughlin (2017) finds that advantage, meaning and pleasure influence donors' giving behaviour and explain why donors choose to give. Examples of advantages include tax benefits, prestige, and reputation. Meaning includes donors' feelings of morality and pleasure is related to the psychological benefits that come from helping others. Individuals work to maximise advantage, meaning and pleasure in every interaction, including during the fundraising process.	This model is based on research, including relationship fundraising, however, it is a conceptual model that has not yet been tested. Also, it is developed from the perspective of the donor and thus does not consider the fundraiser's own meaning or pleasure in the relationship.
Five-tiered model of relationship	This model describes the evolution of major donor-fundraiser	Theoretical model which documents how fundraising

| development (Shaker & Nelson, 2021) | relationships in higher education, including how they are developed and maintained. | relationships progress in stages, evolving from a "basic connection" to a "consequential bond" (Shaker & Nelson, p. 6) becoming increasingly closer over time. Based on qualitative data with a small sample size; findings may not be generalizable. |

Source: Author's creation

These fundraising relationship models reflect the nurturing nature of major donor-fundraiser relationships and emphasise how relationships are developed at the individual level during dyadic interactions. More contemporary relationship models indicate that interpersonal aspects of fundraising relationships are important. However, they also identify risks associated with fundraisers developing ever-deepening relationships with donors, including fundraisers offending donors or coming across as unprofessional or unethical. Some fundraisers feel cautious about sharing personal information with donors, especially early in their career (Shaker & Nelson, 2021), indicating a practical need for training and a deeper understanding of what type of – and how much – fundraisers should talk about their personal lives with donors. At the same time, some donors express a desire to know fundraisers on a more personal level and feel dissatisfied with the relationship when fundraisers are unable to let their guard down and share more intimate details of their life (Shaker & Nelson, 2021). The existing relationship models are limited in their ability to help fundraisers understand the complexity of their social (non-work-related) interactions with donors, indicating a need for additional research.

2.3.4 Section Summary

Section 2.3 analysed the importance of relationships in major gift fundraising activities, and critically evaluated existing relationship models that instruct fundraisers on how to build relationships with donors. Early fundraising relationship models (e.g., Smith, 1977; Dunlop, 1993) identified overarching steps in the fundraising process, but are limited in they describe what fundraisers need to do, but not how to do it. Also, these models do not acknowledge the interpersonal nature of major gift fundraising and are untested and developed based on practitioner experience rather than empirical research.

A significant shift occurred in the early 1990s with the introduction of a paradigm called relationship fundraising (Skarmeas & Shabbir, 2011) which emphasises meeting donor needs to establish long-term relationships and encourage repeat gifts (Burnett, 2002). The inception of relationship fundraising revolutionised the fundraising industry (Tempel, 2010) and reframed the way in which donors and fundraisers interact. Relationship fundraising strategies are donor-centric and fundraisers who employ these strategies focus on meeting each individual donor's needs, recognising, and reflecting their preferences and engaging with donors to understand their deep-rooted motivations and purpose (Pitman, 2008).

Relationship fundraising borrows techniques from marketing and social psychology (Skarmeas & Shabbir, 2011) to build genuine, loyal relationships with donors. However, relationship fundraising was developed by fundraising professionals drawing on years of professional experiences and anecdotal information rather than data or empirical research. Even today, despite

its prominence in the field, relationship fundraising remains largely untested in the academic literature (Shaker & Nelson, 2021), indicating a need for additional attention and opportunities for research.

In addition, by fixating on donors and their needs, the relationship fundraising paradigm largely ignores fundraisers and their role in the fundraising process, despite their autonomy in interacting with donors and role in facilitating donations (Alborough, 2019). More contemporary fundraising relationship models have considered fundraisers' role in the fundraising process (e.g., McLoughlin, 2017), and are beginning to recognise the importance of interpersonal aspects of the donor-fundraiser dyadic interactions, including how well individuals relate to one another, demonstrate respect, communicate and make each other feel comfortable. However, these models are also untested and fail to study the effect of interpersonal interactions and aspects on donors' giving decisions and behaviours.

One of the most common aspects of interpersonal relationships (Greene et al., 2006) involves sharing personal information about oneself with another individual, or self-disclosure. The following section analyses the role of self-disclsoure in the relationship development process, and critically evaluates literature from social psychology, marketing and fundraising relevant to the current research.

2.4 Self-disclosure as a relationship development tool

Self-disclosure, or the wilful act of revealing personal information about oneself to another (Greene et al., 2006), is one of the most important tools individuals use to build relationships with others (Collins & Miller, 1994). In fact, as Dindia et al., (1993) indicate, it is hard to imagine how a relationship could develop without self-disclosure. Found to be a key determinant of relationship development in all types of relationships, including between friends (Berg, 1987), romantic partners (Sprecher & Hendrick, 2004), and even in professional relationships, such as between clients and suppliers (Haytko, 2004), individuals use self-disclosure to establish and maintain relationships with others (Dindia et al., 1997).

Self-disclosure's role in relationship development has been studied extensively for more than 50 years (Altman & Taylor, 1973; Berg, 1987; Dindia et al., 1997; Sprecher & Hendrick, 2004; Greene et al., 2006; Carpenter & Greene, 2015; Haytko, 2004; Koponen & Julkunen, 2022). The next sections analyse how self-disclosure is most often studied from two theoretical perspectives, social exchange theory (Homans, 1958) and social penetration theory (Altman & Taylor, 1973). Both theories, as well as other key concepts that are important to the study of self-disclosure and relevant to the current research, are critically evaluated in the next sections. The section concludes with a summary and a justification for the chosen theoretical and conceptual frameworks.

2.4.1 Social exchange theory

Social exchange theory was originally developed by Homans (1958) more than half a century ago to explain social behaviour that is based on a pattern of exchange. The theory says that over time, social exchanges can lead to high-quality relationships if exchange partners feel rewarded by the behaviour that is traded (Emerson, 1976). Homans (1958) introduced the concept that exchanges are not limited to tangible materials (like an exchange of cash for a product) and can include intangible resources like approval, status, and, most pertinent to the study of self-disclosure, information (Cropanzano & Mitchell, 2005).

According to social exchange theory, individuals who choose to disclose (or not) do so based on an evaluation of the cost and benefits to themselves, their partner, and the relationship (Greene et al., 2006). Models and studies of self-disclosure that rely heavily on social exchange theory are typically related to disclosure decision-making (i.e., Omarzu, 2000) which find that individuals weigh the costs of self-disclosure (rejection, vulnerability, loss of privacy) with the rewards (social support, catharsis) when deciding whether to disclose (Derlega et al., 2008).

As an explanation for how individuals establish and maintain relationships over time, social exchange theory says that individuals begin and continue relationships in which the rewards of the relationship outweigh the costs (Levine et al., 2010). Thus, relationship partners keep a constant tally of relational costs and rewards running in their mind on imaginary spreadsheets (Levine et al., 2010). According to social exchange theory, if the rewards column outweighs the costs column, the relationship continues.

However, the goal of most relationships is to achieve equality in social exchanges, where costs and rewards and equal for both individuals (Molm, 2006). As it relates to self-disclosure, social exchange theory helps explain why individuals take turns trading self-disclosures (Sprecher et al., 2013) and typically match the level of sensitive information that is disclosed to them (Laurenceau et al., 2004), to create a sense of relational equilibrium. Applied to a fundraising context, social exchange theory says that major donors will choose to stay in a relationship with a fundraiser if the rewards of that relationship (information, attention, validation, respect) outweigh the costs (time, energy, attention).

A key aspect of social exchange theory is that the value of resources that are exchanged changes over time (Homans, 1958). Applied to a fundraising context, the value of the information a fundraiser shares with a major donor will also likely change over time. For example, when donors are first learning about an organisation or a programme, this information provided by fundraisers will be extremely valuable. Over time, fundraisers will have to adapt their strategies to share new information or adopt other strategies for donors to continue to feel rewarded by the relationship. One potential source of new information could be self-disclosure.

According to social exchange theory, relationships have certain norms of exchange (Emerson, 1976) which must be followed for the relationship to thrive. These norms become the guidelines for what types of self-disclosures can occur in relationships, and when and where disclosures can occur (Redmond, 2015). Norms depend heavily on the individual differences of the people involved, for example, some individuals are comfortable sharing a lot of personal information about themselves with others and expect their partners to do the same, while others share less

and would be shocked to receive such information (Colvin & Longueuil, 2001). When relational

norms are violated, individuals who commit the offense can be seen as unbalanced or

inappropriate (Cozby, 1973), so understanding whether fundraisers' self-disclosures would

violate the norms of fundraising relationships is important to understand.

Limitations

Although social exchange theory has many benefits as a theoretical framework from which to

study self-disclosure, it is limited in two significant ways: first, it makes assumptions about

individual behaviour that may not be relevant, especially in the context of fundraising and

philanthropy; and second, it is too broad.

One of the most discussed limitations of social exchange theory that is applicable to the current

research is that it requires an assumption that human beings are calculating and rational

(Redmond, 2015). Social exchange theory assumes that individuals are guided by self-interest,

constantly assessing the rewards, cost, and overall profit of relationships (Molm, 2003).

However, studies (e.g., Cropanzano & Mitchell, 2005) have found that some individuals will stay

in relationships to benefit the other person, even if the costs of the relationship outweigh the

rewards, and that some individuals are motivated by a desire to help others, as opposed to what is

always in their self-interest (Korsgaard et al., 2010). This finding is particularly relevant for the

current research, in which participants are major donors giving away their resources to help

others. Major donors are sometimes motivated to give by a sense of selflessness, driven

exclusively by the needs of others (Herzog & Price, 2016). Social exchange theory does not take these motivations into account, thus limiting its applicability to the current research.

A second limitation of social exchange theory relevant to the current research is that it is too broad. It can be used to describe almost any interaction occurring between two or more people (Cropanzano et al., 2017). Although this breadth allows for flexibility and has allowed social exchange theory to become one of the most influential frameworks to explain relationships development in management and social psychology, its lack of specify has been identified as a weakness (Cropanzano et al., 2017). Scholars have branched out to study various aspects of social exchange theory (i.e., power, distributive justice, resources), without identifying a set of agreed upon concepts and attributes of the theory (Redmond, 2015).

One such theory that branched off from social exchange theory, which focuses specifically on the exchange of self-disclosure, is called social penetration theory. It is reviewed in the next section.

2.4.2 Social penetration theory

Social penetration theory is heavily influenced by social exchange theory and says that individuals utilize self-disclosure to begin, deepen, and maintain relationships (Altman & Taylor, 1973). It is a foundational theory in the study of relationship development and while social exchange theory describes the exchange of information and other resources more broadly, social

penetration theory specifically describes the importance of self-disclosure in developing and maintaining relationships (Pennington, 2021).

Social penetration theory is an ideal lens through which to study relationship development (Greene et al., 2006; Sprecher & Hendrick, 2004; Tang & Wang, 2012; Carpenter & Greene, 2015) because it explains how information exchange helps a relationship progress from superficial and inconsequential to more intimate and significant (Carpenter & Greene, 2015). Social penetration theory has most often been studied in social psychology to explain the development of interpersonal relationships, including those between strangers, roommates, close friends, and family members (Berg, 1984; Sprecher & Hendrick, 2004). However, the theory has also been studied in the context of developing long-term business-to-business (B2B) relationships (Haytko, 2004; Koponen & Julkunen, 2022) and serves as a basis for several fundraising relationship development models (Smith, 1977; Dunlop, 1993; Shaker & Nelson, 2021).

According to social penetration theory, relationships develop in a linear fashion during which individuals gradually allow themselves to be known by revealing incrementally more personal information (Altman & Taylor, 1973). In this way, relationships become closer and stronger because of the self-disclosure process (Altman & Taylor, 1973).

According to Altman and Taylor (1973), social penetration occurs through four distinct stages: orientation, exploratory affective exchange, full affective exchange, and stable exchange. These stages are defined by the different content that is disclosed in each stage (Pennington, 2021). A

59

description of the four stages and examples of how they might be applied in a fundraising setting are provided in Table 2.6. A discussion of these stages is relevant to the current research because they describe how relationships develop and what type of information may be shared at what point during the development of a relationship, including a fundraising relationship. These stages also inform the research design.

Table 2.5: Four stages of social penetration theory

Stage	Description	*Application to fundraising scenario
Stage 1- Orientation	Usually the shortest phase, initial interactions (i.e., strangers) Disclosure is limited and superficial Characterized by caution and hesitancy	Major donor and fundraiser meet at a fundraising event, introduce themselves, and share their connection to the non-profit organization (for example, a major donor to a university shares that they graduated from the university and the fundraiser shares that they have been working at the university for five years).
Stage 2 - Exploratory affective exchange	Getting-to-know-you phase (i.e., casual acquaintances) Disclosure may contain some more private information Characterized by general friendliness, casualness	Fundraiser invites donor for coffee to get to know them better. Major donor and fundraiser exchange information about where they live, how long they have lived in the area and their college major.
Stage 3 - Full affective exchange	Know each other well (i.e., dating partners, close friends) Disclosure of very private information or aspects of the "core self" increases Characterized by comfort, inconsistency in revealing aspects of core self. Most relationships do not progress past this point	Donor and fundraiser have experienced multiple positive interactions characterised by increasing comfortableness and sharing more information. Now, when they meet, they pick up where they left off, talking about their families, home renovation projects, vacations, and other life events.

| Stage 4 - Stable exchange | Long-term commitment (i.e., soul mate, spouse)

Richness of information disclosed, easy interactions, revelation of core self without worry

Characterized by stability, predictability, and mutuality. This stage is achieved very rarely | Sometimes major donors and fundraisers become true friends, characterised as "soul mates" (Temple, 2010), sharing intimate details about their lives and maintaining their relationship long after the fundraiser leaves the organization (Shaker & Nelson, 2021). |

Source: Altman & Taylor (1973); *Author's creation

The four stages of social penetration theory are defined by the breadth and depth of the information that is disclosed (Altman & Taylor, 1973). Breadth refers to the number of topics that are discussed (Altman & Taylor, 1973). An example of disclosure breadth would be a count of topics discussed during a conversation: name, profession, height, alma mater, age, hometown, marital status. The more topics that are discussed, the greater the breadth of disclosure (Nguyen et al., 2012). Disclosure breadth is an important part of relationship development because it helps reduce uncertainty (Altman & Taylor, 1973).

Disclosure depth refers to the level of intimacy characterized by the information that is shared (Altman & Taylor, 1973). For example, individuals who share descriptive facts like their name, age, and hometown are sharing information that is known by many people, or information that is typically freely shared, is considered low-depth information. Disclosing low-depth information is a low-risk behaviour (Altman & Taylor, 1973). In contrast, there is much greater risk in sharing intimate, or high-depth information, such as feelings, emotions, dreams, and values (Altman & Taylor, 1973) because of the vulnerability that is involved with sharing such personal information. Disclosure depth is important in relationship development because when high-depth

information is disclosed, the act of disclosing can convey information about the strength of the relationship (i.e., this is a trusting relationship where I feel safe sharing personal information) as well as about the person receiving the disclosure (i.e., you are a person who I trust with this sensitive information) (Tang & Wang, 2012). According to social penetration theory, as relationships develop, individuals consciously decide whether to increase the breadth and depth of their self-disclosure to progress the relationship through its stages (Altman & Taylor, 1973).

A useful image for describing the breadth and depth dimensions of social penetration theory is the onion metaphor. Through interpersonal interactions, individuals disclose information about themselves and in doing so, they peel back the layers of information to reveal their 'core self' (Carpenter & Greene, 2015). The outer layers of an individual's personality contain more information that is visible to everyone (low-depth information), while the inner layers of an individual's personality contain information about the person's core self (high-depth information). Within a particular topic of self-disclosure, like family, the depth of the information shared can vary (Altman & Taylor, 1973). For example, the difference between discussing the number of individuals in your family versus traumatic events that affected your family.

Figure 2.1: Social Penetration Theory Onion Metaphor

Basic characteristics

Preferences, interests

Plans, ambitions

Religious and other beliefs

Values, traits, fears

Self-identity and self-concept
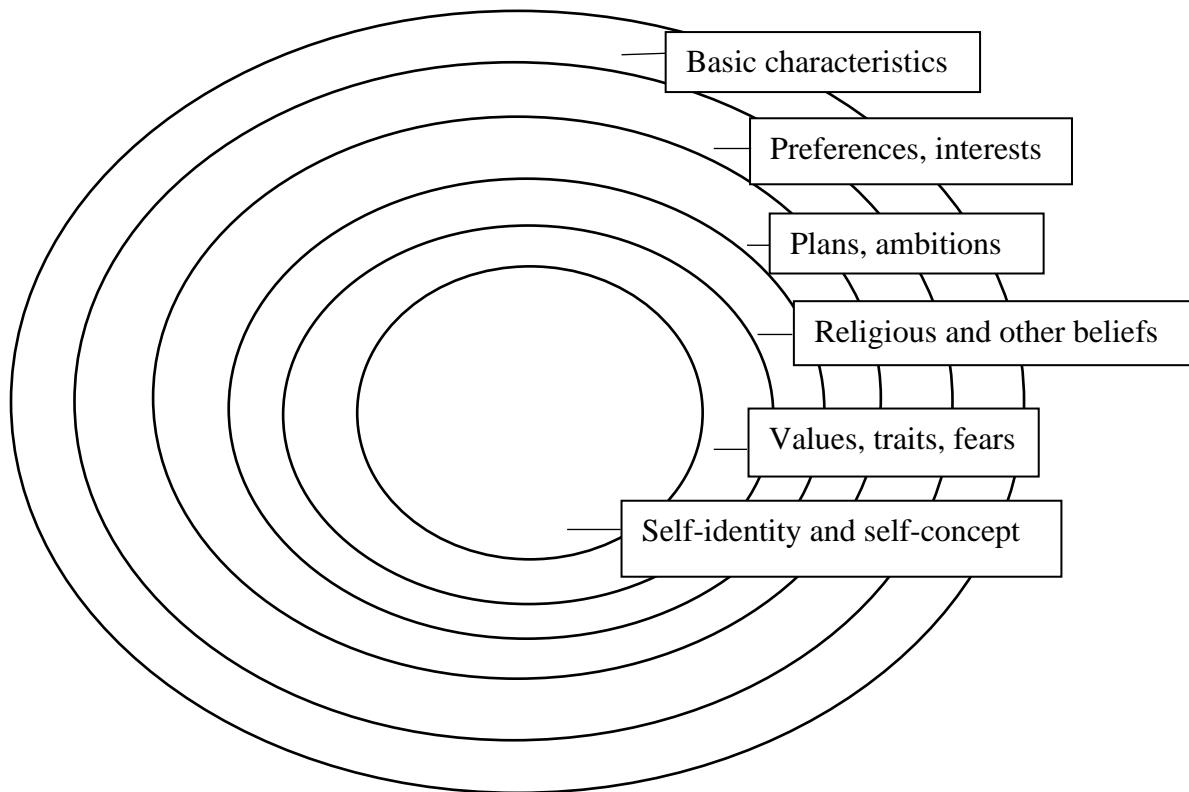
Source: Adapted from Altman & Taylor (1973)

Self-disclosure content

According to social penetration theory, the content of individuals' self-disclosure plays an important role in the relationship development process because not all disclosures have the same impact on the relationship (Gibson, 2018). For example, high-depth disclosures, including information about one's emotions or feelings, has a greater impact on relationship development than the disclosure of superficial (i.e., low-depth) information (Altman &Taylor, 1973). High-depth disclosures are more rewarding for individuals to receive and may communicate that the conversation partner is liked and trusted by the person who discloses (Taylor et al., 1973).

63

Research testing the tenets of social penetration theory finds that self-disclosure can reinforce and strengthen a relationship. For example, (Gore et al., 2006) studied the effects of emotional self-disclosure on relationship development and found that the disclosure of emotional, high-depth information increased feelings of closeness and commitment. Major donors and fundraisers exchange personal information during their relationship development; however, fundraisers must maintain a level of professionalism that may not be a concern in a personal relationship. Most research on high-depth disclosures to date has occurred in personal relationships, for example, between friends and romantic partners, so little is known about how or whether high-depth information should be shared in a professional relationship, like a major donor-fundraiser relationship.

In addition, there is a need to understand whether self-disclosure affects more than just participants' feelings, but also their behaviour. The current research is interested in testing the relationship between the content of a fundraiser's self-disclosure on a major donor's giving intention. The three content areas that will be investigated in the current research are disclosures that are: 1) self-related (versus other-related), 2) high-depth (versus low-depth), and 3) mission-related (versus mission-unrelated). It is predicted that fundraisers' self-related, high-depth and mission-related disclosures will be positively related to donor's giving intention.

Self-related disclosure should be more impactful than other-related disclosures because it is more relevant to the fundraiser-donor relationship being investigated. It is predicted that high-depth disclosure will have a positive relationship with donors' giving intention because in past research (Gore et al., 2006) high-depth disclosures have been shown to create more positive feelings for

recipients and it is predicted that these more positive feelings and a stronger relationship between the fundraiser and the donor will impact the donor's giving intention. Finally, as mentioned previously, it is predicted that mission-related disclosures will be positively related to donors' giving intention because the fundraiser's mission-related disclosure will communicate to the donor how the fundraiser is connected to the mission of the organisation, a connection that presumably will be shared by the donor. Research by Sargeant and Lee (2004) has suggested that donors who have a direct connection to the cause of the organisation they are supporting (for example, breast cancer survivors) may feel more committed to an organisation that does breast cancer research. It is possible that the donors' feelings for the organisation spill over to feelings about the fundraiser who is representing the organisation. Other findings show that shared beliefs help drive commitment in charitable giving (Sargeant & Woodliffe, 2007), which may also extend to giving intention.

Limitations of social penetration theory

As with any theory, social penetration theory has certain limitations that should be noted. The main criticisms of social penetration theory are that it assumes that relationships develop in a logical and systematic way, unfolding gradually over time (Derlega et al., 2008). Some relationships, however, progress rapidly, sometimes soon after individuals first meet, while other relationships go through phases of more and less intense disclosure (Derlega et al., 2008). Other scholars have noted that social penetration may be more important in certain stages of relationships (i.e., when two people meet and are first getting to know each other) than in other stages of their relationship, thus the predictive quality of the theory may depend on relationship

stage (Sprecher & Hendrick, 2004). Finally, social penetration theory does not take into

consideration individual characteristics of the people disclosing, for example, whether they are

introverts or extroverts (Carpenter, & Greene, 2015).

Justification for chosen theory

Despite these limitations, social penetration theory was chosen as the theoretical framework for

the current research because of its focus on how self-disclosure drives the relationship

development process (Derlega et al., 2008). While social exchange theory explains the exchange

of various social rewards involved with individuals' social interactions, social penetration theory

has a narrower emphasis on self-disclosure's role in the process. Social penetration theory

explains how relationships are developed and maintained by shared exploration of 'mutual

selves' (Derlega et al., 2008, p. 155), which aligns with the way fundraisers have described

sharing personal information about themselves with donors in the fundraising literature. In

addition, at least one study investigating relationships between fundraisers and major donors

suggested that fundraising relationship development can be explained by social penetration

theory (Shaker & Nelson, 2021).

2.3.5 Other key concepts related to self-disclosure

For the current research, concepts that are associated with, but not contained within, the tenets

and principles of social penetration theory are referred to as the conceptual framework (Grant &

Osanloo, 2014). The conceptual framework allows researchers to specify and define concepts

that are related to and help explain elements of the theoretical framework and are important to understand within a given research topic (Grant & Osanloo, 2014). Two concepts that are prevalent in the general study of self-disclosure, linked to social penetration theory, and relevant to the current research, are the concepts of reciprocity and gender.

Reciprocity

One of the most consistent findings in the study of self-disclosure, is that self-disclosures are almost always reciprocated (Cozby, 1973; Greene et al., 2006; Sprecher et al., 2013). In this way, the process of self-disclosure is cyclical, with individuals sharing information back-and-forth during interactions (Greene et al., 2006). However, one of the most significant gaps in the fundraising literature is the emphasis on donors' disclosures, indicating that self-disclosure is, or should be, one-sided in fundraising relationships.

When individuals reciprocate self-disclosure, they usually match the amount and depth of the disclosure that they receive. For example, individuals who disclose more receive more disclosures from others (Greene et al., 2006); and when individuals disclose intimate information their partner feels obligated to match the level of intimacy with their own disclosure (Carpenter & Greene 2015). Interestingly, research shows that individuals use reciprocity to encourage or inspire their conversation partners to disclose (Collins & Miller, 1994), which could be important in a fundraising context when fundraisers are trying to get to know donors and trying to understand their interests, passions, and values.

There are three possible explanations for why self-disclosure is reciprocated (Sprecher et al., 2013). First, the social attraction-trust hypothesis (Dindia et al., 2002) says that when people receive a disclosure from someone else, they feel that the discloser is communicating that the receiver is liked and trusted (Collins & Miller, 1994). This makes the receiver of the disclosure feel good and encourages future exchanges (Sprecher et al., 2013). The second reason for reciprocity is explained by social exchange theory and says that disclosing and receiving disclosure are both rewarding activities (Greene et al., 2006), and in fact, some studies have found that people who receive self-disclosures have stronger positive feelings about the relationship than those who disclose (Sprecher et al., 2013). In addition, social exchange theory says that individuals work to create balance and equality in their relationships when it comes to social rewards (Homans, 1958), so non-reciprocal self-disclosure may make relationship partners uncomfortable (Sprecher et al., 2013), and they may be encouraged to reciprocate to achieve relational equilibrium. Finally, reciprocation may be considered a relational social norm (Gouldner, 1960). This distinction indicates that rather than a recognized pattern of social exchange, reciprocity occurs because of a feeling of moral obligation or moral belief (Gouldner, 1960) about the 'right' way to behave during conversations with others. Some people are concerned about over-benefitting from their social interactions and so feel compelled to not just receive, but also provide social support to others by listening to their disclosures (Gouldner, 1960).

Gender

Along with reciprocity, gender differences are one of the most researched topics in the study of

self-disclosure, though a majority of the research was conducted between the late 1970s and the

late 1990s (Dindia et al., 1997; Dindia & Allen, 1992; Hill & Stull, 1987). Gender is particularly

relevant to the current research because the fundraising industry is dominated by female

fundraisers (Breeze, 2017) and behaviours associated with relationship building and connecting

with others are typically considered stereotypical female behaviours (Dindia & Allen, 1992).

Additionally, recent fundraising research has highlighted the importance of investigating gender

dynamics in social relationships, finding that some female fundraisers experience sexual

harassment from donors and a feeling from their managers that they must do 'whatever it takes'

to close gifts (Beaton et al., 2021). However, little research on gender differences in verbal

(versus written/online self-disclosure) has been conducted since the mid-1990s.

Early gender-related self-disclosure studies focused on sex differences, which were associated

with the biological and physical features of males and females and found that women disclose

more than men (Jourard, 1961; Jourard & Lasakow, 1958; Jourard & Richman, 1963). Later

research shifted the focus to gender differences, defined as the socially constructed

characteristics of women and men – such as norms, roles, and behaviour expectations – and

found similar gender differences with women tending to disclose more than men (Hill & Stull,

1987). These early researchers attributed differences to men's role in society as not being

conducive to self-disclosure because men were socialized to be tough, inexpressive, unfeeling,

indicating that men's disclosure may be seen as less appropriate than women's (Shaffer et al., 1992).

In an attempt to draw a definitive conclusion about gender differences in self-disclosure research, in 1992, Dindia and Alan conducted a comprehensive meta-analysis of 205 related research articles and found that small gender differences do exist, with women disclosing more than their male counterparts. However, Dindia and Allen (1992) point out that gender differences depend on the context of the situation and the ways in which the experiments are conducted. In later studies Dindia et al., (1997) found that both men and women reciprocated similarly, including matching the depth of their partner's intimate disclosures in conversations. This finding was attributed to disclosure being an "interaction process" (p. 389) rather than a gender-related difference. Dindia et al., (1997) suggested that all people, regardless of their gender, adapt their typical level of self-disclosure to meet the needs of the situation, their conversation partner, and to achieve their own goals for the interaction.

Recognizing that gender roles and the concept of gender identity have changed over the past 30 years (Ellemers, 2018) since the bulk of the gender-differences research was conducted, more contemporary studies were reviewed for the current research. For example, Sheldon (2013) found that women disclose more than men in face-to-face (versus online) settings, however, men disclose more intimate information, and both genders disclose more to the people they with whom they have the strongest connection and feel the closest to. In other studies, Hook et al., (2003) found that women do not disclose more than men (p. 471), Marshall (2008) found that women and men disclose equally, and Carbone et al., (2021) found that men and women disclose

70

the same amount of positive, but not negative, information. Thus, the researcher's review of the more contemporary literature aligns with Carbone et al., (2021) view that the literature on gender differences in self-disclosure remains "vast and inconclusive" (Carbone et al., 2021, p. 871).

The current research includes gender as an independent variable to respond to the call for gender to be investigated more purposefully in fundraising research (Dale & Breeze, 2021). However, because of the inconsistent findings on gender differences in self-disclosure research (Dindia & Allen, 1992), it is predicted that no gender differences will be found. Rather, this researcher's prediction aligns with Dindia et al.'s (1997) suggestion that both men and women pick up on social cues which cause them to adapt and adjust their disclosure to meet the needs of their conversation partner and/or the situation at hand.

The next sections in this chapter draw on interdisciplinary literature to critically evaluate self-disclosure as a relationship development tool in personal and professional relationships.

2.3.6 Self-disclosure creates positive interactions

Self-disclosure is linked to relationship development because self-disclosure can lead to positive interactions between individuals (Greene et al., 2006) and help encourage future interactions (Hansen & Riggle, 2009) in both personal and professional relationships. Self-disclosure can help individuals make a favourable first impression (Sprecher et al., 2013) and helps reduce uncertainty as individuals are provided with information about who the other is, their background, interests, thoughts, and feelings (Greene et al., 2006). Individuals who receive

disclosures are able to better understand aspects of the discloser's character that would otherwise

not be knowable (Gray et al., 2015). By reducing uncertainty, it is less likely that

misunderstandings will occur (Collins & Miller, 1994) and both the receiver and discloser feel

more comfortable in the conversation (Greene et al., 2006).

Interpersonal aspects of professional relationships, such as business to business (B2B)

relationships, have been studied infrequently in the literature. This literature review focuses on a

specific type of professional relationship, B2B relationships, because they are similar to the

major donor-fundraiser relationships (Sargeant & MacQuillin, 2020; Droillinger, 2018) and thus

are most relevant to the current research. For example, long-term B2B relationships have been

found to have the higher levels of trust and commitment than other marketing relationships

(Zhang et al., 2016). This is similar to major donors, who have also been found to have deeper

and stronger feelings of trust, satisfaction and commitment to the organisations they support than

annual donors (Waters, 2011). Like major donor relationships, B2B relationships are typically

long-term and involve frequent interactions, face-to-face meetings, opportunities to socialize,

and, as a result, sometimes B2B relationships, like major donor-fundraiser relationships, evolve

into close relationships that involve mutual self-disclosure (Haytko, 2004).

Dwyer et al.,'s (1987) seminal article first acknowledged the interpersonal aspects of B2B

relationships and, reflecting elements of social penetration theory (Altman & Taylor, 1973),

conceptualized professional relationships as progressing through phases, with each phase marked

by increased levels of interpersonal connection (Dwyer et al., 1987). Buyers and sellers interact

frequently and share information, including personal information, during their interactions,

which can inspire ongoing personal and professional relationships (Dwyer et al., 1987). Dwyer et al., (1987) likens successful B2B relationships to marriages (Bantham et al., 2003) and point out that "if the relationship is to survive… intimate disclosure must be reciprocated," (Dwyer et al., 1987, p. 16). Although Dwyer et al., (1987) made a significant contribution to the importance of interpersonal communication in professional relationships, their article was conceptual and did not specifically study self-disclosure.

More contemporary research finds that in B2B relationships self-disclosure creates positive interactions for both the buyer and seller because of both professional and personal benefits (Haytko, 2004; Koponen & Julkunen 2022). For example, mutual self-disclsoure leads to increased job satisfaction for sellers and more harmonious B2B relationships (Haytko, 2004). These benefits increase over time as the relationship progresses and leads to increased levels of trust, improved communication and conflict management, and increased confidence in the seller (Koponen & Julkunen, 2022). When salespeople self-disclose, buyers feel more comfortable and less worried that the salesperson is trying to take advantage of them (Hansen & Riggle, 2009). Thus, self-disclosure is perceived as ethical behaviour and is positively associated with buyer communication and positive word-of-mouth communication to others (Hansen & Riggle, 2009). The social bonds that develop as a result of exchanging self-disclosure can tie B2B partners together in a way that is more significant than economic factors, and lead to increased customer satisfaction and increased perceived value (Bolton et al., 2003).

Obviously, creating positive interactions with donors is important for fundraisers, who are trying to learn more about their donors, encourage repeat visits and make good impressions. In fact,

73

some have argued that interpersonal communication is critical to fundraising success, and that in their interactions with donors, fundraisers cannot 'keep the relationship purely objective or confine it to business' (Ragsdale, 1995, p. 18). Being willing to disclose personal information is an essential component of a successful fundraising relationship (Ragsdale, 1995), however, self-disclosure has not yet been studied in fundraising relationships.

2.3.7 Self disclosure helps set relational expectations

Individuals expect that certain information will be shared in conversations and they make decisions about what personal details they share with others based on how responsive they expect their conversation partner to be, and how much they assume the other cares about them (Bruk et al., 2018). When speaking with others, individuals often underestimate how much their conversation partner wants to know and how connected they will feel to someone else after sharing self-disclosure (Kardas et al., 2022). However, when individuals do share personal information with others, they report feeling more positive, less awkward and more connected to their conversation partner than they expected (Kardas et al., 2022). Applied to a fundraising setting, when donors share personal information, fundraisers are given an opportunity to potentially exceed donors' expectations by listening attentively, demonstrating interest, care and concern for their donors. Meeting donors' expectations results in stronger, more effective fundraising relationships (Breeze, 2017), which could in turn affect donors' giving. In addition, this research suggests that some fundraisers may be underestimating donors' desire to know them on a more personal level, indicating a need for additional research.

As mentioned in Section 2.3.5, there is a norm of reciprocity in conversations which says that self-disclosures are expected to be returned or matched by the other (Dindia et al., 2002), indicating that in a fundraising setting, donors will likely expect fundraisers to match their self-disclosure. This exchange may occur immediately, within a single conversation, or over the course of the relationship (Greene et al., 2006). Reciprocity is a relational norm that exists in initial interactions, when individuals first meet and are getting to know each other, as well as in more established relationships, as partners work to maintain their emotional connection (Sprecher et al., 2013). Indeed, self-disclosure can be used as a tactic to inspire the other to disclose in response (Collins & Miller, 1994), which is important to understand in a fundraising context when fundraisers are wanting donors to be open about their feelings, past experiences and expectations. Because the interpersonal aspects of fundraising relationships have been understudied, little is known about the risks and benefits of fundraisers reciprocating donors' or how fundraisers' disclosures could be used as a strategy to solicit more information from donors to achieve fundraising success.

The norm of reciprocity exists in both personal and professional relationships. In business relationships, for example, buyers and sellers experience a dialectical tension between sharing and withholding information (Bantham et al., 2003). Individuals are constantly adjusting their behaviour based on their own needs as well as the perceived needs of the other, and commitment to a specific business relationship can increase when individuals meet the other's emotional as well as business-related needs (Rusbult & Buunk., 1993). Self-disclosure in B2B relationships can increase competitive advantage, problem solving and collaboration between partners (Bantham et al., 2003) because it helps characterise the relationship as one with frequent contact

and exchange of information and allows partners to communicate openly and honestly. However, professionals who self-disclose in a business setting risk judgement and reduction of privacy as well as potential damage to current or future business decisions, thus, individuals may be less likely to disclose in a professional setting, or, as one study suggested, they may be more likely to reciprocate, rather than initiate, self-disclosure to ensure appropriateness (Hayotko, 2004). Because of the complexities associated with interpersonal aspects of professional relationships, additional research will help us understand the ideal timing and boundaries that should be considered when fundraisers disclose to major donors.

The expectation for conversation partners to match each other's disclosures goes often unspoken, but is palpable, even in fundraising situations. For example, fundraisers feel a sense of obligation in returning donors' disclosures and must be prepared to self-disclose during their interactions with major donors to help donors feel comfortable sharing their own personal stories, and to respond to the donor's emotions (Breeze, 2017). One fundraiser participant in Breeze's (2017) study reflected on feeling pressured to follow a donor's disclosure with one of her own:

> Where are the boundaries? I had a meeting with someone that I really didn't know very well, and they suddenly shared a horrendous personal family history. I was very aware in my mind when this story was being laid out that I had to reciprocate because it was so exposing. I thought: 'If I don't offer something back then I'm not going to be able to come back to this person. I've got to find another connection to them'. (Female A) (p. 119)

This not only implies that fundraisers self-disclose during their interactions with major donors, but also that they may feel conflicted about what to disclose, and that these disclosures may occur out of a sense of obligation rather than as part of an authentic, natural reciprocation.

Breeze (2017) identifies a significant gap in the literature when she says that both donors and fundraisers are expected to self-disclose as part of the relationship development process, however 'the instrumental nature of such efforts goes unremarked in the non-profit sphere, despite expectations going far beyond what would be deemed appropriate in other professions' (p. 119).

2.3.8 Self-disclosure is psychologically and socially beneficial

Human beings are inherently social, and our wellbeing is linked to the quality of our social relationships with others (Holt-Lunstad, 2018), including, presumably, donor/fundraiser relationships. Individuals who spend more time self-disclosing during their interactions with others tend to be happier than individuals who discuss more superficial matters (Mehl et al., 2010), which could help benefit fundraisers' job satisfaction or donors' giving experience. Self-disclosure helps combat feelings of loneliness and isolation (Maner et al., 2007), which could be particularly important for older major donors, and can help individuals process and move past a negative life experience (Slepian & Moulton-Tetlock, 2019). Therefore, the psychological benefits of self-disclosure may have particular significance in a fundraising context and indicate a need for investigation.

Self-disclosure benefits individuals in professional relationships as well. For example, self-disclosures have been found to increase salespeople's psychological wellbeing and their perceived ability to do their job effectively (Geiger & Turley, 2005), which in a fundraising setting could affect fundraisers' job performance and satisfaction. Other research has found that

self-disclosures help trust develop in business relationships, leading to mutual loyalty and broad

support (Rousseau et al., 1998), which fundraisers are also attempting to achieve with their long-

term major donors. During frequent interactions, partners develop a sense of interdependence

and they provide socioemotional support and share concern for each other's wellbeing (Rousseau

et al., 1998). Fundraisers who adhere to the dominant paradigm of relationship fundraising are

working to meet their donors' needs, persumably including their psychological and social needs,

to create meaningful connections with others. Self-disclosure may be an important way that

fundraisers do so.

2.3.9 Self-disclosure helps progress and maintain relationships

Individuals inherently have a strong desire to connect with others (Baumeister & Leary, 1995)

and disclosing personal information to others is one way individuals strengthen social ties with

others (Aron et al., 1997). When individuals are willing to open up and participate in self-

disclosure, this can be interpreted as a sign of trustworthiness and honesty, which helps deepen

relationships between two people (Kardas et al., 2022), and is important to study and understand

in a fundraising context as major gift fundraisers work to develop and strengthen relationships

with major donors.

Sharing personal information, contrasted with small talk about the weather and other superficial

matters, deepens relationships more significantly and is more impactful on relationships (Kardas,

et al., 2022). For example, individuals who self-disclose to others (versus keep subject matters

surface level) are happier and have stronger connections with others (Milek et al., 2018), and

there is some indication that most people in relationships do not disclose enough deep and intimate content to "maximise the quality of their relationships" (Kardas et al., 2022, page 26). Thus, perhaps all of us, including fundraisers, should be disclosing more with others to deepen our connections with others.

Relationships are strengthened by self-disclosures because the act of sharing personal information is a way some individuals communicate to others that they are liked and trusted (Collins & Miller, 1994) and individuals who receive disclosures from others feel good as a result (Sprecher & Treger, 2015) and develop stronger positive feelings for people who are willing to disclose (Collins & Miller, 1994). Self-disclosures can communicate the status of a relationship (Greene et al., 2006). For example, self-disclosures help communicate that the partners have a safe and trusting relationship, that the relationship itself is a close one, and can reflect how well the partners are getting along (Greene et al., 2006). Self-disclosures can be used to communicate to others that they want to invest in or intensify a relationship (Tolstedt & Stokes, 1984) and help individuals maintain their relationships by creating a feeling of shared meaning (Duck, 1994). Applied to a fundraising context, fundraisers are interested in establishing new and maintaining existing relationships with major donors, thus it is significant to understand the role self-disclosure plays in the process. Self-disclosure in relationships is associated with feelings of relationship satisfaction and relational stability (Sprecher & Hendrick, 2004), which are both important to fundraising professionals. In addition, self-disclosures provide an opportunity for individuals to be open and vulnerable, which helps build trust, a key determinant of fundraising success (Shaker & Nathan, 2017).

In B2B relationships, self-disclosure drives the progression of relationships from those that are characterised by polite, effective, business-focused communication to true friendships defined by shared interests, mutual care and concern and social bonding (Koponen & Julkunen, 2022). Dwyer et al., (1987) highlight the importance of frequent and effective communication in business relationships in order to achieve relationship goals. As mentioned previously, self-disclosure can help meet people's relational expectations, leading to a positive evaluation of the relationship and increasing interpersonal dependence (Bantham et al., 2003), which may make it more difficult for individuals to terminate the relationship (Koponen & Julkunen, 2022). These findings suggest that fundraisers working to establish a sense of loyalty with their donors and create long term relationships may utilise self-disclosure as a tactic to do so.

Interpersonal aspects of professional relationships increase job satisfaction for the marketing professions (Haytko, 2004) and lead to business-related benefits including time-savings, cost-effectiveness, increased customer confidence (Koponen & Julkunen, 2022) and conflict resolution (Haytko, 2004). Thus, they benefit the relationship partners personally and professionally. As fundraisers work not only to get to know donors, but to navigate the complexities that sometimes arise when donors make multi-million dollar gifts, having a relationship built on mutual self-disclosure may be beneficial. However, as will be discussed in the next section, self-disclosure has not been intentionally studied in a fundraising context.

2.3.10 Self-disclosure in fundraising

As mentioned, self-disclosure has not been intentionally studied in a fundraising context, however, five known articles acknowledge the role that self-disclosure plays in fundraising relationships. Each is critically evaluated in Table 2.6.

Table 2.6: Studies related to self-disclosure in fundraising

Citation	Methods	Findings	Relevance to current research	Limitations
Ragsdale, 1995	Conceptual article	Argues that interpersonal communication is critical to fundraising success, and that in their interactions with donors, fundraisers cannot 'keep the relationship purely objective or confine it to business' (Ragsdale, 1995, p. 18).	Ragsdale (1995) says that fundraising relationships cannot be successful unless fundraisers are willing to disclose personal information about themselves to donors.	Ragsdale's (1995) article is important in identifying self-disclosure as something that does – and should – occur in fundraising relationships, however it does not empirically investigate fundraisers' self-disclosure. Instead, it simply acknowledge its existence and rightly make a call for other researchers to look into the matter.
Breeze and Jollymore, 2017	In-depth interviews with 73 major gift fundraisers in the UK and Canada	Fundraisers are critical players in the fundraising process. Strong relationships between fundraisers and donors are the key to securing major gifts, and fundraisers work to build a personal connection with a donor to encourage loyalty and a positive giving experience.	One of only five known articles that acknowledge that fundraisers must participate in self-disclosure during the fundraising process. Participants indicate that being open and vulnerable with donors helps build trust, which has been shown to be a key determinant of fundraising success (Shaker & Nathan, 2017).	Breeze and Jollymore (2017) recognises fundraisers' self-disclosure as part of the fundraising process but does not test the effect of the disclosure on a donor's giving behaviour or help unpack how self-disclosure is related to important relational concepts, like trust, that help create successful fundraiser-donor relationships.
Alborough, 2017	In-depth, semi-structured	Participants emphasised the importance of building trust with	Findings demonstrate the important of donor-	Findings are based on interviews with all types of

	interviews with 30 UK fundraisers	donors before even attempting to solicit larger gifts. With trust established, donors and fundraisers become 'locked in a reciprocal relationship with social interactions' (p.1606). Donors and fundraisers start as strangers and, because 'interactions and information exchange' ultimately establish a 'real and intimate' relationship (p. 1607).	fundraiser interactions and hint that both donors and fundraisers and self-disclosing, by describing information exchange. Findings support Sargeant and MacQuillin's (2020) statement that fundraisers apply the same logic to building relationships with donors as with others and indicates that it would be appropriate to apply what is known about how individuals develop relationships with others in personal and professional relationships to how fundraisers and donors build relationships in a fundraising context.	fundraisers, making major donor-specific findings difficult to ascertain. As described in Section 2.2.1, major gift fundraisers interact with donors in much different ways than other donors, so these findings might not be able to be generalised.
Nyman et al., 2018	In-depth, semi-structured interviews with fundraisers in Canada who had secured 'transformational gifts' of $5 million Canadian dollars or more,	Study emphasised the relational nature of fundraising and found that donors and fundraisers work together to create philanthropic gifts during dyadic interactions. Donors and fundraisers develop 'deep, personal' relationships (p. 9) and donors' strong feelings go beyond their feelings for the organisation or the cause to fundraisers themselves.	Self-disclosure is more likely to occur in close, personal relationships (Laurenceau et al., 2004), and indicates donors' interest in knowing the fundraisers personally, which would require self-disclosure.	Investigated fundraising at Canadian institutions of higher education, where giving is less well-established than in the U.S. (Nyman et al., 2018) and it does not study self-disclosure specifically.

| Shaker and Nelson, 2021 | Semi-structured interviews with 40 major donors and fundraisers in U.S. higher education | Identified a five-tiered model of donor-fundraiser relationship development, during which donor-fundraiser relationships evolve from a "basic connection" to a "consequential bond" (p. 6). | Confirms that both fundraisers and donors disclose during their interactions, but also that self-disclosure plays a role in developing strong, successful relationships with donors. | The research does not describe how fundraisers utilise self-disclosure in their relationships or investigate the impacts of self-disclosure on the fundraiser-donor relationship, or donors' giving decisions. |

2.5 Summary & Conceptual Framework

The literature reviewed in this section provided context for the current research and helped identify critical gaps that the research aim addressed. This chapter began with a review of the body of knowledge on fundraising, including what is known about major donors and fundraisers. Key characteristics of major donors include 1) long-term relationships with the organizations they support and its personnel (Nyman et al., 2018), 2) frequent and personalised, face-to-face interactions (Weinstein & Barden, 2017), 3) involvement in the work of the organization (Schervish, 2005), 4) development of strong feelings for the causes they support (Waters, 2008) and 5) their disclosure of deeply personal information to fundraisers during the fundraising process (Sargeant & Shang, 2010). These characteristics create opportunities and environments in which mutual self-disclosure is likely to occur.

A significant gap in the literature is related to the lack of information related to how fundraisers influence the fundraising process. Despite their autonomy in interacting with major donors (Breeze, 2017) and the significant potential impact their work has on a non-profit organization's work (Buteau et al., 2019), fundraisers are infrequently studied in the literature (Dale & Breeze, 2021). What is known about fundraisers is they possess unique communication and relationship building skills (Shaker & Nathan, 2017) that likely encourage open and honest conversations with donors that help build strong relationships (Alborough, 2019). However, the current literature emphasises fundraisers' listening skills without considering the personal information (i.e., self-disclosure) they may contribute to conversations, and donors' expectation that they do so.

The evolution of fundraising relationship development models was critically evaluated, including how contemporary models reflect the industry's shift in focus from transactional donor relationships which emphasise the organisation's needs to genuine relationships that focus on meeting donors' needs. This paradigmatic shift, which occurred as a result of the industry-wide adoption of relationship fundraising strategies as best practice for fundraising relationship development, encourages fundraisers to know donors on a deeply personal level and help them achieve a sense of purpose and meaning through their charitable giving. However, despite its prominence in fundraising, relationship fundraising strategies and contemporary fundraising relationship develop models remain largely untested. In addition, there are risks associated with authentic relationship building in a professional setting, like fundraising, including the potential for damaging relationships as a result of over- or under-sharing, blurring the lines between professional and personal relationships, and creating opportunities for potentially unethical behaviour.

One of the most important ways individuals begin and develop successful personal (Greene et al., 2006) and professional (Haytko, 2004) relationships is self-disclosure. However, although some fundraising research has recognised the importance of self-disclosure in fundraising relationships (e.g., Breeze, 2017; Ragsdale, 1995; Shaker & Nelson, 2021), it has not yet been studied in a fundraising setting. This is another significant gap in the literature.

It is argued that self-disclosure benefits the individual disclosing, the person receiving the disclosure and the relationship between the partners (Greene et al., 2006). For example, the individual disclosing can experience psychological benefits, including enjoyment, (Gray et al.,

2015), self-clarification (Greene et al., 2006), and it can help individuals process and make sense of life events (Derlega et al., 2008). Individuals who receive disclosures from others experience reduced uncertainty and increased comfort (Gray et al., 2015), which are important positive feelings for donors to experience during their interactions with fundraisers. Disclosures can also help individuals make a favourable impression or be used as a tactic to inspire the other to disclose in response (Collins & Miller, 1994). Self-disclosures can also benefit the relationship by communicate to others a desire to intensify a relationship (Tolstedt & Stokes, 1984) or help individuals maintain their relationships by creating a sense of shared meaning (Duck, 1994). Thus, fundraisers and non-profit organizations who are interested in meeting the needs of donors and creating positive interactions and giving experiences may benefit from understanding how self-disclosure plays a role in that process.

Self-disclosure is most often studied from two theoretical perspectives, social exchange theory (Homans, 1958) and social penetration theory (Altman & Taylor, 1973). Social penetration theory (SPT) was chosen as the theoretical framework for the current research because it specifically focuses on how self-disclosure (versus other relational resources) drives the relationship development process (Derlega et al., 2008). According to SPT, relationships develop in a linear fashion during which individuals gradually allow themselves to be known by revealing incrementally more personal information (Altman & Taylor, 1973). SPT aligns with the way fundraisers described sharing personal information about themselves with donors in the fundraising literature (Breeze, 2017), and at least one study investigating relationships between fundraisers and major donors suggested that fundraising relationship development may be explained by social penetration theory (Shaker & Nelson, 2021).

87

Other concepts that are relevant to the study of self-disclosure and the current research make up the research's conceptual framework. These concepts are reciprocity and gender. The reciprocal nature of self-disclosure has been studied as long as the topic itself (Jourard & Lasakow, 1958), and is a key aspect of the relationship development process (Reis & Shaver, 1988). Reciprocity describes the back-and-forth nature of self-disclosure during which individuals take turns sharing information. Reciprocity is critical to the current research because to date only donor's self-disclosures have been discussed in the fundraising literature and there is a significant need to understand what role fundraisers' self-disclosure plays in the relationship development process.

Similarly, gender is important to the current research because the fundraising industry is dominated by female fundraisers (Breeze, 2017) and behaviours associated with relationship building and connecting with others are typically considered stereotypical female behaviours (Dindia & Allen, 1992). However, gender differences in self-disclosure research have been inconclusive, with mixed results based on situational factors (Dindia, 1993), or small, if any results showing that women tend to disclose more than men (Dindia & Allen, 1992). Thus, the current research investigates whether disclosure received from female versus male gender effects the relationship between the disclosure and the donors' giving behaviour, but no differences are expected to be found.

Researchers who study self-disclosure have called on others to investigate potential mediating variables which could help explain how self-disclosure influences relational development (Sprecher & Hendrick, 2004). Thus, three potential mediating constructs were identified from the literature that might help explain the relationship between a fundraiser's self-disclosure and a

donor's giving behaviour: communal strength, connection, and commitment. These constructs may help explain the relationship between a fundraiser's self-disclosure and a donor's giving intention. For example, self-disclosure is more likely to occur in a communal relationship (Mills & Clark, 1982; Mills et al., 2004) and communal strength is a measure of the extent to which individuals feel responsible, are willing to incur cost and feel distressed if they could not meet the needs of the other (Mills et al., 2004). Similarly, studies of B2B marketing relationships have found that customers can feel a sense of connection to the salespeople (Murry & Heide, 1998; Bolton et al., 2003) and businesses with which they interact (Swaminathan et al., 2007). Commitment is also extremely important to the development of both personal (e.g., Fehr, 1999; Rusbult, & Buunk, 1993) and professional (e.g., Morgan & Hunt, 1994) relationships, and in a fundraising context, commitment was found to moderate, or strengthen, donors' giving behaviours (Sargeant et al., 2006). Thus, it is expected that a donor's feelings of communal strength, connection and commitment will mediate the relationship between a fundraiser's self-disclosure and a donor's giving intention.

In addition to the constructs of communal strength, connection and commitment, the current research will explore whether a donor's moral identity moderates any relationship between the included constructs. Moral identity is a self-definition that is organised around one's moral beliefs and has been found to influence one's behaviours (Aquino & Reed, 2002), including volunteering, helping others and donating more money (Reed & Aquino, 2003) In this research, it is predicted that moral identity will increase the relationship between the other variables studied. In addition, the current research will contribute to the field's understanding of the role of moral identity in a major giving (versus annual giving) context.

89

To show how the theories and concepts identified as part of the literature review fit together, the

following research model is proposed in Figure 2.2.

Figure 2.2: Research model framework
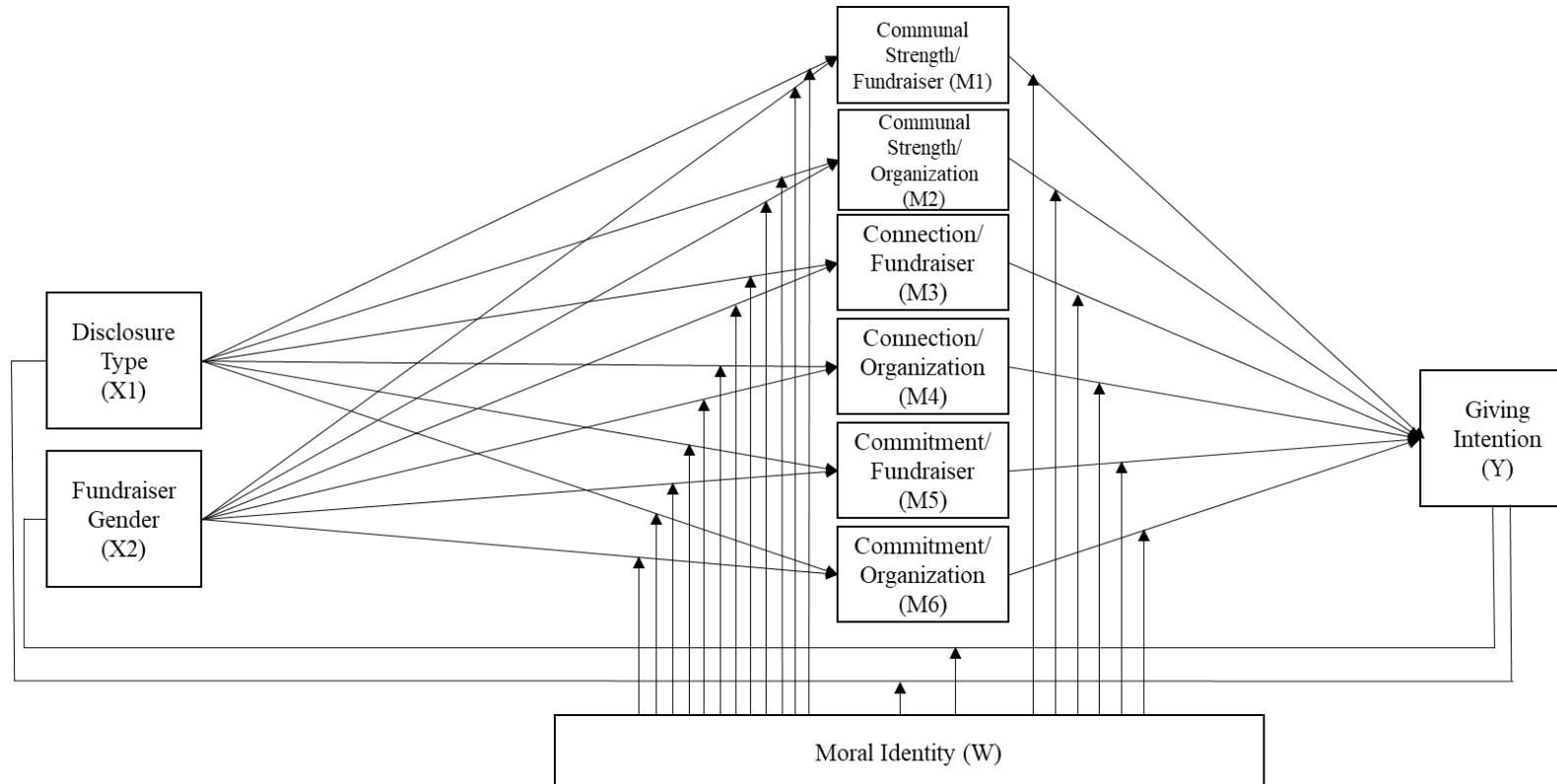
The research model will be tested using the following hypotheses:

H1: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be moderated by a donor's moral identity.

H2: The relationship between a fundraiser's gender and a donor's giving intention will be moderated by a donor's moral identity.

H3: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

H4: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

H5: The relationship between a fundraiser's disclosure content and a donor's giving intention will be mediated by a donor's feelings of connection a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

H6: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of connection a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

H7: The relationship between a fundraiser's disclosure content and a donor's giving intention will be mediated by a donor's feelings of commitment a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

H8: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of commitment a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

It is important to note that in the current research, moral identity is a variable of interest, however, the primary focus of the research is related to the fundraiser's self-disclosure and its effect in the context of a major gift fundraising scenario. Thus, the title of the thesis, as well as the hypotheses, and the research aims and objectives reflect this intentional focus. The next chapter describes and justifies the research philosophy, approach and methods chosen for the current research.

Chapter 3: Methodology

This chapter begins with a reminder of the research aims and objectives. Next, it explains the research philosophy that guides the research and provides a detailed description of the research methods that were employed. A justification for using mixed methods with a sequential explanatory approach is provided.

A sequential explanatory approach is a two-phase, mixed-methods approach which begins with quantitative data collection (Phase 1). Findings from the quantitative data are then explored further during a qualitative phase (Phase 2) that follows. The qualitative phase helps integrate and explain the quantitative results (Creswell & Plano Clark, 2018). Thus, in this chapter the research design, participants and procedures are discussed separately for each phase.

3.1 Research aims and objectives

The researcher first identified gaps in the literature related to how fundraisers use self-disclosure in their relationship development. Building genuine relationships with donors is a key aspect of fundraising, and having a better understanding of what role self-disclosure plays in the fundraising process is important to fundraisers, as well as their managers. The researcher also identified a need for an investigation into whether a fundraiser's self-disclosure can predict donor behaviour (i.e., giving intention). Guided by the theoretical and conceptual frameworks, as well as the researcher's own curiosity, the researcher first developed the overall research aim,

followed by the specific objectives for the Phase 1 research. As a reminder, the overall aim of the study was to investigate what role fundraisers' self-disclosure plays in fundraiser-major donor interactions.

3.1.1 Phase 1: Quantitative

Objectives of the quantitative Phase 1 research helped address the research aim. They were:

1. To determine whether the content of a fundraiser's self-disclosure predict a donor's giving intention.

    a. To determine whether the results of objective 1 are different for male and female fundraisers.

2. To investigate the relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents. Is there a "ripple effect"?

3. To determine whether variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention.

The research questions for Phase 1 were:

1. Does the content of a fundraiser's self-disclosure predict a donor's giving intention?

    a. Are the results of research question 1 different for male and female fundraisers?

2. Is there a relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents? That is, is there a "ripple effect"?

3. Do variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention?

The next section describes the research objectives for Phase 2.

3.1.2 Phase 2: Qualitative

After data analysis for Phase 1 was completed (data analysis procedures are discussed in detail in section 3.4.5), few statistically significant results were found, which was surprising. Thus, further explanation of how fundraisers use self-disclosure in building relationships with major donors was needed. While the Phase 1 research was more narrowly focused on the relationship between specific variables, the purpose of the Phase 2 research was to zoom out and to explain the Phase 1 findings by providing a more holistic picture of how fundraisers use self-disclosure in fundraising relationships and how they perceive self-disclosure impacts those relationships.

Objectives of the Phase 2 research were:

4. To investigate fundraisers' lived experiences utilizing self-disclosure during interactions with major donors.

5. To understand how fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions.

6. To explore whether the lived experiences and perceptions of male and female fundraisers differ.

The research questions for Phase 2 were:

1. What are fundraisers' lived experiences utilizing self-disclosure during interactions with major donors?

2. How do fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions?

3. Are the lived experiences and perceptions of male and female fundraisers different?

In conclusion, the research objectives and questions for Phase 1 and Phase 2 were developed sequentially, to adhere to best practices (Creswell & Plano Clark, 2018). The following section discusses the philosophical position of the researcher as it relates to the current research project. The philosophical underpinnings of all research are important to explore so that researchers can be aware of their own assumptions and how those assumptions can shape the research process and how knowledge can be gained (Howell, 2013).

3.2 Research philosophy

Researchers' background, past experiences and assumptions influence their research (Jackson, 2015). For example, researchers' chosen subject matter or the research questions they choose to pursue are formed by their own curiosity, interest, and way of seeing the world. This section describes the researcher's philosophical worldviews (Creswell, 2009) so that the researcher and readers are aware of assumptions that may influence the work (Jackson, 2015). It also explains how the researcher determined the research philosophy for the current research. The section

begins with definitions of key terms related to research philosophy to provide clarity to the reader.

A research philosophy is a broad term that encompasses all elements of a research project, including the researcher's own assumptions about the nature of knowledge and how that knowledge can be obtained (Saunders et al., 2007). As part of a research philosophy, researchers must consider paradigms of inquiry, each with its own ontological, epistemological, and methodological perspectives.

Although differing definitions of the term 'paradigm' exist in the literature, for the current research, paradigm was defined as a set of assumptions, concepts and practices that guides a researcher's worldview (Tuli, 2010). It can be thought of as a net which holds ontological, epistemological, and methodological views about knowledge, values, reality, and logic (McGregor & Murnane, 2010). Ontology is related to what knowledge is (Saunders et al., 2007). Epistemology is related to how one knows it to be true (Tuli, 2010). Methodology is related to how the knowledge can be obtained (Tuli, 2010). Table 3.1 identifies the ontological, epistemological and methodological perspectives of the three most common research paradigms, positivism, postpositivism and constructivism (Guba & Lincoln, 1994). Each paradigm is then discussed in more detail in the sections that follow.

Table 3.1: Common research paradigms

Term	Positivist Paradigm	Postpositivist Paradigm	Constructivist Paradigm
Ontology	Naïve realism – "real" reality but knowable	Critical realism – "real" reality, but only imperfectly and probabilistically knowable	Relativism – local and specific constructed realities
Epistemology	Dualist/objectivist: findings true	Modified dualist/objectivist; critical tradition/community; findings probably true	Transactional/subjectivist; created findings
Methodology	Experimental/ manipulative; verification of hypotheses; chiefly quantitative methods	Modified experimental/ manipulative; critical multiplism; falsification of hypotheses; may include qualitative methods	Hermeneutic/dialectical

Source: Lincoln, Lynham & Guba (2011)

3.2.1 Positivist paradigm

The positivist paradigm was born in the mid-19th century and places utmost importance on the obtainment of objective, scientific knowledge (contrasted with metaphysical or religious information) (Howell, 2013). Positivism was developed based on the idea that the same principles found in the natural sciences could exist in the social sciences - that human behaviour, like matter, can be objectively quantified and measured (Alharahsheh & Pius, 2020). Researchers who adopt the positivist paradigm believe in stable, unchanging laws of cause and effect that govern human behaviour (Aliyu et al., 2014).

As Table 3.1 describes, the ontological perspective associated with the positivist paradigm is that reality is "out there", independent of the researcher, and can be perfectly understood and explained (Tuli, 2010). It emphasises objectivity, quantification, replication, and law-like findings that can be generalised to other populations or situations (Aliyu et al., 2014). According to the positivist paradigm, human beings live in an unbiased world and the complexity of their behaviour can be reduced and operationalised into variables that can be studied scientifically and empirically (Aliyu et al., 2014). The objective of research conducted within the positivist paradigm is control, prediction, and explanation (Alharahsheh & Pius, 2020).

Positivist researchers focus on facts, rather than subjective impressions (Park et al., 2020). The epistemological perspective of the positivist paradigm is that the researcher and the researched exist completely independent of one another (Howell, 2013), and that human beings are objects that can be studied and controlled (McGregor & Murnane, 2010). During data collection, the researcher objectively observes and records information without altering or interpreting its meaning (Alharahsheh & Pius, 2020). This objectivity ensures that the research project produces precise, valid, reliable data (Tuli, 2010). That data is, in turn, collected and analysed in a highly systematic way to achieve replication of findings and validation of the data as objectively true and generalizable to other settings (Saunders et al., 2007).

The specific ontological and epistemological assumptions of the positivist paradigm require an objective, detached methodology (Tuli, 2010). Research conducted within the positivist paradigm typically relies on observation, experimentation and manipulation of treatments and conditions (Park et al., 2020). The approach uses theories to make predictions about phenomena

(Alharahsheh & Pius, 2020). Researchers then identify hypotheses to test the theories in a controlled setting (McGregor & Murnane, 2010), with a goal of approximating the real world as much as possible, while being removed from it (Aliyu et al., 2014). The positivist research paradigm allows researchers to make general cause and effect explanations for social phenomena (Tuli, 2010).

In Phase 1 of the current research, the researcher used information from the literature review to identify variables and develop hypotheses about the predictability of a fundraiser's self-disclosure on a donor's giving intention. Thus, the researcher initially considered whether the positivist paradigm would be a good fit for the current research. However, the positivist paradigm does not allow conclusions to be drawn based on feelings or emotions (Park et al., 2020). The positivist paradigm has also been criticised for its rigidity and its inability to take contextual information into account or to allow for alternate explanations of why phenomena occur (Alharahsheh & Pius, 2020). As is discussed in the following sections, other paradigms allow for deeper exploration of topics and richer insights into the complexities of situations (Aliyu et al., 2014).

3.2.2 Postpositivist paradigm

In contrast to positivism, the postpositivist paradigm rejects the ideal that absolute truth can be known, allowing for more flexibility than can be found in the positivistic paradigm (Creswell, 2009). The postpositivist tradition was developed in the 20th-century as a response to positivism and holds that causes probably – but not certainly – determine effects (Creswell, 2009).

As noted in Table 3.1, the ontological perspective of the postpositivist paradigm states that reality is external to individuals but may not be able to be completely known (Howell, 2013). Phenomena can be observed and measured, and these are probably true, however, post-positivism recognises researchers' imperfection and says that law-like certainty may not be possible to obtain (Bisel & Adame, 2017). Postpositivistic researchers observe reality critically and believe that reality is real only until proven otherwise (Howell, 2013).

Like positivism, the goal of postpositivism is to explain, predict and control (Howell, 2013). However, the two paradigms differ in that postpositivists believe that the best we can say is that what we know is probably, but not definitively, true (Creswell, 2009). Within this probabilistic worldview, postpositivist reject the positivist notion that researchers and their subjects can be perfectly detached, believing that separation and objectivity is an ideal that is constantly being strived for, but may not ever be obtained (Howell, 2013). In contrast to positivism, postpositivism does not believe it is possible to make broad cause-and-effect generalizations, but rather makes context-specific conclusions that are up for ongoing debate (Howell, 2013).

The underpinnings of the methodological perspective associated with the postpositivism paradigm are critical, focused on constant questioning, debate, and exploration (Howell, 2013). This research design is often associated with mixed methods, exploring phenomena with both qualitative and quantitative techniques (McGregor & Murnane, 2010).

Criticisms of the postpositivistic paradigm are that it can result in multiple and competing findings (Panhwar et al., 2017), sometimes leading to confusion. In addition, because postpositivism recognises the potential for personal bias in research, it is seen by some as less objective than positivism (Panhwar et al., 2017). Despite its limitations, the researcher adhered to Creswell and Plano Clark's (2018) recommendation to utilise the postpositivist paradigm during Phase 1, the quantitative phase. Postpositivism allows for more understanding of the complex nature of phenomena, allowing subject matter to be explored both quantitatively and qualitatively. Considering the aims of the intended research, the postpositivist paradigm was chosen as the best fit for Phase 1 of the current research.

3.2.3 Constructivist paradigm

On the opposite end of the philosophical spectrum from the positivist paradigm is the constructivist paradigm (Tuli, 2010). Both paradigms recognise that human behaviours can contain patterns and predictability. However, positivists believe that the laws of cause and effect explain those patterns, whereas constructivists believe that patterns are subjective and interpreted by individuals based on their experiences as they interact socially with others (Howell, 2013). With roots in sociology and anthropology, researchers first began using constructivism in the 19th century as a response to the rigidity of positivism, and as an attempt to generate new insights and knowledge in some research areas that had grown stale (Creswell & Plano Clark, 2018).

While positivists believe that reality can be observed objectively, constructivists believe that reality is a human construct based on interpretation (Tuli, 2010) and that bias is unavoidable

(Aliyu et al., 2014). According to this worldview, there is no such thing as universal truth (Aliyu et al., 2014) and the social world is so complex that it cannot possibly be explained by the same definitive laws that govern the natural sciences (Saunders et al., 2007). The constructivist paradigm emphasises exploration of a world that is constantly changing (Tuli, 2010) and an effort to understand why phenomena occur (McGregor & Murnane, 2010). Instead of generalizability, the goal of constructivists' research is credibility, trustworthiness, and dependability (McGregor & Murnane, 2010). Constructivists believe that a single phenomenon can have multiple meanings and they seek to understand the unique context in which phenomena occur (Saunders et al., 2007). They achieve intellectual rigor by making systematic methodological decisions and being transparent about their data collection strategies and any theoretical frameworks that guide their analysis (McGregor & Murnane, 2010). Their data analysis procedures produce themes which develop through an iterative research process (Mackenzie & Knipe, 2006).

The epistemological perspective associated with the constructivist paradigm relies on personal contact between the researcher and the researched (Tuli, 2010). Researchers must question insiders and interpret their experiences to understand phenomena – it cannot be observed naturally (Jackson, 2013). They must take on an empathetic stance toward participants (Saunders et al., 2007) and rely on descriptive language, and rich narrative explanations (Tuli, 2010). Because of this, sample sizes are sometimes smaller than in the positivist paradigm and the relational nature of the researchers' interactions with participants is paramount (McGregor & Murnane, 2010). Researchers become a part of the research process, rather than remaining separate from it, as in the positivist paradigm (Tuli, 2010).

The methodological underpinnings of the constructivist paradigm are often qualitative (Creswell & Plano Clark, 2018) and focus on language, signs and meanings that are divulged by participants and interpreted by the researcher (Saunders et al., 2007). Statistical techniques are usually not employed (McGregor & Murnane, 2010) and research findings are co-created by the participants and researcher (Howell, 2013). Thus, the richness of constructivism provides narrative descriptions that explore complex research problems from multiple perspectives (Tuli, 2010).

The Phase 2 research objectives were interested in exploring the complexities and situational aspects of fundraisers utilizing self-disclosing during their interactions with major donors. The constructivist paradigm allowed the researcher close, personal contact with participants to understand their subjective experience and perspective. Using descriptive words, the researcher was able to interpret participants' reality and find patterns and meaning in their own words. For this reason, the constructivist paradigm was chosen as an appropriate way to orient Phase 2, the qualitative phase of the current research.

As a reminder, the current research is a mixed methods design with a sequential explanatory approach. Creswell and Plano Clark (2018) recommend that a sequential explanatory mixed method design be guided by two distinct sets of assumptions for each phase. They advise using the constructivist paradigm for the qualitative phase, which emphasises the lived experiences of participants. For the quantitative phase (Phase 1), Creswell & Plano Clark (2018) recommend a postpositivist approach, which can be used to synthesise theory into the research design, choice

105

of instruments, identification of variables and data analysis. Thus, the current research follows their recommendations.

3.2.4 Summary

In summary, the researcher's paradigmatic choices for the current research were informed by recommendations from Creswell and Plano Clark (2018), who argue that it is possible for researcher to shift their assumptions during a research study and allow different paradigms to guide their thinking during different phases of the research. Using a sequential explanatory approach (explained in more detail in the next section), the first phase of the current research is quantitative, thus, Creswell and Plano Clark (2018) recommend beginning with a postpositivist paradigmatic approach. Variables were identified and hypotheses developed based on theories and research findings from the literature review. Also important for the current research, postpositivism can be used to make predictions, like whether a fundraiser' self-disclosure can predict a donor's giving intention, and allows relationships between variables to be investigated, a main objective of Phase 1.

When using a mixed methods sequential explanatory approach, Creswell and Plano Clark (2018) recommend that researchers shift their assumptions during the second, qualitative, research phase. During the qualitative phase, researchers are concerned with developing a deeper understanding of their findings identified after analysing the data from Phase 1 of the research. More detailed explanations of the findings are sought. In the current research, the researcher

sought to understand how fundraisers use self-disclosure to build relationships with major

donors. This search to understand the lived experiences of a few individuals (to explain the Phase

1 findings more fully) requires the assumptions of the constructivist paradigm. "The final

interpretation of the two sets of results could then be based on one set of assumptions or on a

dialectic involving both sets of assumptions," (Creswell & Plano Clark, 2018, p. 78).

There is debate in the scientific community about whether it is possible to shift paradigmatic

thinking during a single study. For example, some researchers believe that a single "best"

paradigm for mixed method research should be chosen and utilised throughout all phases of the

project (Tashakkori & Teddlie, 2003). Others, like Creswell and Plano Clark (2018), believe that

it is possible to have flexibility in a study and shift paradigmatic thinking depending on the phase

of the study (quantitative vs qualitative) and the aims of the research. The flexible approach

allows research paradigms to serve as "tools creatively used to fit a certain research situation,"

(Creswell & Plano Clark, 2018, p. 41). The paradigm helps a researcher design a study, choose

the appropriate methods, apply theories, and appropriate procedures that align with the

paradigmatic choice (Howell, 2013). Creswell and Plano Clark (2018) point out that flexibility in

paradigmatic thinking may not be possible during a research study that involves concurrent

collection of both qualitative and quantitative data. For concurrent projects, they recommend

applying a singular approach to the entirety of the research. However, the sequential explanatory

approach utilised in the current research involves distinct phases during which the first

quantitative phase begins and ends before the qualitative phase is started. In conclusion, because

of this separation of the phases, and following the recommendation of experts in mixed method

research, the researcher chose to adopt the postpositivism paradigm for Phase 1 of the research and constructivism for Phase 2 of the research.

The next section describes mixed methods and the sequential explanatory approach in more detail and justifies the researcher's choice for this approach in the current research.

3.3 Research approach

3.3.1 Mixed methods

Mixed methods research combines elements of both quantitative and qualitative approaches to achieve a broad understanding of a research topic (Johnson et al., 2007). It allows researchers to collect and analyse both quantitative and qualitative data to answer research questions, integrates both types of data for the purpose of research and to inform the design, and allows theory to guide and shape the research approach (Creswell & Plano Clark, 2018).

Mixed methods research is appropriate for research questions that cannot be addressed using quantitative or qualitative methods alone (Venkatesh et al., 2016). The current research questions are interested in (Phase 1) whether certain variables have predictive power, which can be answered using quantitative methods; and (Phase 2) how fundraisers' lived experience explains the results of Phase 1, which can be answered using qualitative methods. The quantitative and qualitative research questions were answered separately, which is one way research questions are developed in mixed methods studies (Venkatesh et al., 2016). In particular, because the

sequential explanatory approach utilises qualitative data to explain findings from a quantitative study, the qualitative research questions are typically not developed until quantitative after data collection (Creswell & Plano Clark, 2018).

There are several advantages of utilizing mixed methods research to achieve the aims of the current research. Mixed methods allow researchers to develop rich insights containing highly detailed information related to their research questions (Creswell, 2009). When one data source is insufficient to answer a research question, or when results need additional explanation, as was the case in the current research, mixed methods research is often employed (Creswell & Plano Clark, 2018).

Both quantitative and qualitative research methods have limitations. For example, quantitative data can allow researchers to generalise about a large population, however, it is difficult for quantitative data to explain the context in which phenomena are occurring or the lived experience of individuals who are being studied. Similarly, qualitative data can help provide a detailed understanding of a situation or process but lacks the ability to study relationships between specific variables or to test the predictive power of variables in a study (Flick et al., 2004). Using mixed methods helps provide a more complete answer to a research question, which considers problems from multiple points of view (Creswell & Plano Clark, 2018).

Mixed methods are useful when initial research results need additional explanation (Creswell & Plano Clark, 2018). For example, the results of Phase 1 of the current research resulted in an incomplete understanding of how fundraisers use self-disclosure in building relationships with

donors. Thus, the second phase of the research allowed the researcher to further explain when, why and how fundraisers disclose to donors during the fundraising process to present a more thorough understanding of the overarching research questions. By using both quantitative and qualitative data to investigate the questions, the weaknesses of each method (when used independently) are offset and strengthened (Creswell, 2009).

Limitations of using a mixed methods approach include the skill set of the researcher and the time and resources available to conduct both quantitative and qualitative data collection (Creswell & Plano Clark, 2018). For example, mixed methods requires that the researcher be familiar with research procedures and considerations applicable to both data types (Creswell, 2009) and understanding of issues of reliability, validity and bias that are related to both methods. Mixed methods studies are often more time consuming because multiple sources of data must be collected, and additional resources like separate software systems that help analyse both quantitative and qualitative data can present difficulties for researchers if they are not prepared (Creswell & Plano Clark, 2018).

This researcher considered the limitations of mixed methods, however, decided that this choice was most appropriate for answering the research questions in the current project. To address the limitation of the researcher's skill set, this researcher consulted the literature for resources related to mixed methods and studied common methods of data collection, research design an issue related to the rigor of the research for both qualitative and quantitative methods. In addition, this researcher considered time restraints of mixed method research and learned about resources available through the University of Plymouth for data analysis software packages for both data

types. Ultimately, this researcher determined that mixed methods were best for addressing the specific aims and questions presented in the current research. Mixed methods are used when research questions are best answered using multiple sources of data, and when a second source of data is needed to explain a first (Creswell & Plano Clark, 2018). Thus, this researcher believes that the multiple data sources are complimentary and allow for a more complete answer to the research questions.

3.3.2 Sequential explanatory approach

Once mixed methods were chosen for the current research, the researcher considered different mixed method approaches that inform the research design. Creswell and Plano Clark (2018) identified three core mixed method approaches, which are described in Table 3.2 below:

Table 3.2: Three Core Mixed Method Approaches

Approach	Purpose	Data collection	Data analysis	Integration
Convergent	Results combined and compared	Quantitative and qualitative data collection occurs concurrently	Data analysed simultaneously	Integration occurs after all data is collected and analysed
Sequential Explanatory	Quantitative results are connected to and explained by qualitative results	Quantitative data collected first, then qualitative	Quantitative data are fully analysed before qualitative data collection occurs	Integration occurs between quantitative phase and qualitative phase, and after the qualitative phase is complete
Sequential Exploratory	Qualitative results inform the development of a	Qualitative data collected first, the	Qualitative data are analysed first and used to develop a	Integration occurs after the qualitative phase,

| | quantitative instrument, then the instrument is tested, and quantitative data are analysed | quantitative data | quantitative instrument; Quantitative data is collected using the instrument developed | used to develop a quantitative instrument, and after the final quantitative phase |

Source: Creswell & Plano Clark (2018)

As shown in Table 3.2, the convergent approach was not chosen because it requires data collection to occur concurrently, and the sequential exploratory approach was not chosen because it is typically used when the qualitative phase occurs first and informs the creation of a quantitative instrument, tool or intervention that is subsequently tested. Because the current research begins with a quantitative phase (Phase 1) and utilises a qualitative phase (Phase 2) to help explain the results of initial findings, the sequential explanatory approach was chosen for the current research.

The procedures associated with the sequential explanatory approach are explained in Table 3.3.

Table 3.3: Sequential Explanatory Mixed Methods Procedures

Step	Description
Step 1: Design and Implement the Quantitative Phase	- State quantitative research questions and determine the quantitative approach - Obtain permissions - Identify the quantitative sample - Collect closed-ended data with instruments - Analyse the quantitative data using statistics to answer the research questions and facilitate the selection of participants for the second phase
Step 2: Use Strategies to Connect from the Quantitative Results	Determine which results will be explained, such as: significant results, nonsignificant results, outliers, group differences

	• Use these quantitative results to: refine the qualitative and mixed methods questions, determine which participants will be selected for the qualitative sample, and design qualitative data collection protocols.
Step 3: Design and Implement the Qualitative Phase	• State qualitative research questions that follow from the quantitative results and determine the qualitative approach • Obtain permissions • Purposefully select a qualitative sample that can help explain the quantitative results • Collect open-ended data with protocols informed by the quantitative results • Analyse the qualitative data using procedures of theme development and those specific to the qualitative approach to answer the qualitative and mixed methods research questions
Step 4: Interpret and Collect Results	• Summarise and interpret the quantitative results • Summarise and interpret the qualitative results • Discuss to what extent and in what ways the qualitative results whelp to explain the quantitative results

Source: (Creswell & Plano Clark 2018, p. 79)

Two key aspects of the sequential explanatory approach include priority and integration (Creswell & Plano Clark, 2018). Priority involves the approach (either quantitative or qualitative) that is given more weight or attention (Ivankova et al., 2006). Since the current research was conducted in two phases and because the qualitative phase was necessary to explain the unexpected non-significant findings in the quantitative phase, the current research priorities Phase 2, the qualitative phase of the research.

Integration is another unique feature of the sequential explanatory approach and typically occurs during two stages of the research process (Creswell & Plano Clark, 2018). Integration occurs when both quantitative and qualitative methods are combined (Ivankova et al., 2006). In the current research, integration occurs during the development of the interview protocols for Phase

2. The researcher used theory and the data from the quantitative Phase 1 results to develop interview questions to help explain the non-significant results from Phase 1. Integration also occurred during the analysis of the Phase 2 qualitative data and during the discussion of findings from both phases during which the researcher discussed integrated results and conclusions about how the qualitative data explain the quantitative data. Integration will be discussed in more detail in Section 3.4.6.

The sequential explanatory approach is straightforward and easy to implement because only one data type is being collected at a time. This makes it a logical choice for an independent researcher (Creswell & Plano Clark, 2018). It also allows for a more robust understanding of quantitative results, which is particularly useful when unexpecting findings result from the initial quantitative inquiry (Ivankova et al., 2006). However, certain challenges with this approach must be considered. For example, researchers must consider time limitations and resources that are available. As mentioned previously, the researcher determined that there was adequate time to conduct both a quantitative and qualitative phase of the current research and utilised resources available to help with data analysis to combat these limitations. In addition, there is some ambiguity in choosing the sequential explanatory approach because the qualitative phase cannot be developed fully until the quantitative phase is complete. Researchers must design the questions and themes that will be explored during the qualitative phase based on the results of the quantitative phase, which can lead to tension and additional time constraints (Creswell & Plano Clark, 2018). With a full understanding of these challenges, the researcher determined the sequential explanatory approach to be the most appropriate for fully addressing the research questions and the overall purpose of the current research.

3.3.3 Deductive approach

The researcher utilised a deductive approach throughout the research process. A deductive approach is used when existing theories, research, or conceptual framework guides the research objectives and helps the research develop hypotheses, whereas an inductive approach begins with the researcher's observations and builds theory or generalisations based on that (Armat, Assarroudi, & Rad, 2018). The current research is guided by social penetration theory (Altman & Taylor, 1973) as well as the conceptual framework related to self-disclosure. Although some scholars have argued that it is possible to adopt a hybrid approach when conducting mixed methods research, whereby the different phases of research are guided by an inductive (typically qualitative) and deductive (typically quantitative) approach (Schoonenboom & Johnson, 2017), the Phase 2 (qualitative) interview protocol was developed with social penetration theory (Altman & Taylor, 1973) and other concepts from the conceptual framework, such as reciprocity and gender, in mind. In addition, as will be described in more detail in Section 4.2.4, several themes from the Phase 1 (quantitative) research were used to provide structure to the thematic analysis process during Phase 2 and connect the two studies during a period of integration. According to Love and Corr (2022), using quantitative independent and dependent variables as a coding framework for a qualitative phase of research is an example of a deductive research approach. Thus, the researcher adopted a deductive approach during both research phases.

3.4 Methods employed

3.4.1 Phase 1: Research design

For the quantitative Phase 1 portion, the researcher used a cross-sectional survey design. The rationale for this choice is that cross-sectional surveys are used frequently in social sciences to collect information on behaviours (Connelly, 2016), and this research is interested in donor's giving behaviours (i.e., deciding whether and how much to donate). In addition, cross-sectional surveys are often used to investigate relationships between variables, another aim of the current research.

A cross-sectional survey allows for precise measurement and statistical analysis of data, which can be quickly and easily collected. In addition, surveys are easy to administer, require a minimal time commitment, and can be distributed to donors without their confidential information being shared with the researcher (Creswell, 2009), a concern for many non-profit organisations who are protective of their relationships with donors. Surveys also allow for a large sample size to be collected so that inferences can be made and generalised to a broader population of fundraisers and donors.

Other quantitative research designs considered for this phase included longitudinal studies, polls, and telephone interviews. The non-profit organisations approached to consider participating in the study preferred using surveys because it provided a layer of protection of confidentiality between the researcher and their donors and was easy to administer. The researcher considered

mail and telephone surveys; however, both delivery methods were determined inappropriate because the non-profit organisations did not want to share donor information – like addresses and phone numbers, with outsiders. Time restraints and resources were barriers to conducting a longitudinal study. Online electronic surveys are commonly used data collection tools, so the researcher determined that participants would be familiar with them and comfortable responding, hopefully making them more likely to respond.

3.4.1.1 Validity and Reliability

In designing Phase 1 of the research, issues of validity and reliability were considered. Validity is achieved when the instruments used measure what they intend to measure and reliability is achieved when the measurements taken are accurate (Heale & Twycross, 2015). In quantitative research, validity is addressed by ensuring that scales chosen to measure variables are used frequently in the literature by subject matter experts, indicating high content validity (Sürücü & Maslakci, 2020). Scales used in the current research have been widely tested, demonstrating adequate convergent (whether the scale items are related to one another) and discriminant (whether the scale items measure the intended variable) validities (Sürücü & Maslakci, 2020).

Meanwhile, reliability occurs when a scale measures a construct similarly over time (Heale & Twycross, 2015). One way to demonstrate a scale's reliability is when it has high internal consistency, which is most commonly determined by a Cronbach's *a* score of .70 or higher (Sürücü & Maslakci, 2020). All scales utilised in the current research meet these criteria.

3.4.1.2 Justification for the use of Qualtrics

The next step in the research design phase was identifying an appropriate survey tool and developing the survey questions. For the current research, it was important to identify the participants first so that the survey questions could be written in such a way as to reflect the mission of the organisation the donor participants were supporting (see section 2.4.2 for more information about why mission-related information was important).

The researcher utilised Qualtrics, an online tool used to conduct survey research. Qualtrics allows researchers to build and distribute web-based surveys. Survey platforms like Qualtrics allow researchers to access participant populations who can be hard to reach (Beymer et al., 2018), like major donors. The survey questions were drafted in a Word document and then built directly on the Qualtrics website. Once a final version of the survey was complete, the researcher shared a link to the survey with a contact at the participating non-profit organization, the Indiana University Foundation, and that individual shared the link with donors so that no donor information was ever accessed by the researcher. The survey was only distributed to one organisation because 1) it proved to be extremely difficult and time consuming to recruit organisations willing to send a survey to their major donors, 2) the information in the vignettes was written to align with the mission of the organisation whose donors filled out the survey. In this case, the vignettes described a hypothetical relationship of a donor giving in a higher education context. Distributing the higher education-focused survey to major donors who give to their local food bank, for example, would not have made sense. The third reason that the survey

was distributed to only one organisation was that an adequate number of responses was received to conduct the statistical analysis, thus additional participating organisations were not recruited.

All communications from Qualtrics and stored data were encrypted. Once data was collected it was accessible only by the researcher and password protected. Once the data collection process was completed, the researcher downloaded the data file onto a personal jump drive that is encrypted, and password protected.

3.4.1.3 Justification for the use of Vignettes

The purpose of Phase 1 was to test the predictive power of a fundraiser's self-disclosure on a donor's giving intention, and to test the relationships between various variables identified during the literature review. The researcher chose to use vignettes in the survey design to convey a scenario in which self-disclosure could occur. Vignettes are a data collection technique used in quantitative and qualitative analysis (Skilling & Stylianides, 2020). Vignettes are written descriptions that simulate real events or problems by realistically conveying a setting familiar to participants (Eckerd et al., 2021). In research, vignettes include standard information about the setting that is consistent across all treatments. The independent variable is manipulated by changing elements of the vignette, which are considered the experimental treatment, and randomly distributed to participants (Eckerd et al., 2021). Vignettes are used regularly in self-disclosure and marketing research. They are helpful to use in the investigation of sensitive topics as well as research projects where context is important in answering the research question

(Eckerd et al., 2021). Key elements, characteristics and descriptors of vignettes are included in

Table 3.4 below.

Table 3.4: Key elements of vignettes in research

Key Elements	Characteristics	Descriptors
Conception	Capturing content	Draw on conceptual or theoretical frameworks, existing literature, and practical experiences to reflect the essence of the research topic
	Realistic and hypothetical portrayals	Portray characters and events that are representative of and meaningful to those experienced by the participants, balancing hypothetical yet realistic situations
	Purpose/ function	Construction guided by the research purpose, data sought, and respondents (e.g., promote/focus/stimulate discussion, solve problems, identify attitudes, seek beliefs, report practices, models of practice, norms, understandings). Vignette functions as the sole method or part of a multiphase data collection.
Design	Presentation	The nature of vignettes requires succinct (not necessarily complete or exact) portrayals of selected information. Brevity and incompleteness allow for participants to interpret/respond in unique and nuanced ways.
	Length	Written vignettes usually range between 50-200 words. Visual tools may be single or multiple images (e.g., comics). Video vignettes are typically a few minutes long. The length should consider maintaining interest, time for absorbing information and responding to it.
	Settings and terminology	Consider participants' degree of familiarity with the vignette situation (settings/language specific to a particular cohort or profession) and ability to adequately respond to it. Also consider the appropriateness of using age-relevant and gender-neutral language.
	Open or closed questioning	Consider the purpose of the vignette to decide the type and format of questions. Open questions allow for more detailed, realistic, and independent reactions to the situation posed in vignettes. Questions may be in a written or verbal form (e.g., if vignettes are part of an interview situation).
	Participant perspectives	Consider from which perspective(s) the participants is (are) being asked to respond to the vignette (e.g., from a vignette character's perspective, another role, or from their own perspective).

	Piloting	Pilot the vignette prior to use to assess the extent of how representative it is of situations and participants.
Administration	Instructions	Provide clear instructions for delivering, and how to respond to, the vignette.
	Timing and responses	Consider the phase within the research study the vignette will be given (e.g., as the starting point or to follow other data collection methods) and provide adequate time for responses.
	Delivery mode and frequency	Consider how the vignette will be delivered (e.g., in person, online) and how this might influence completion and quality of responses. Oral delivery may be appropriate but consider possible bias if read by the researcher or another. Multiple and frequent use may lead to a lack of responses and risk 'carry over' effects.

Source: (Skilling & Stylianides, 2020; p. 544)

The rationale for using vignettes in the current research is that they allow the researcher to collect data that would otherwise not be accessible. It is unlikely that a non-profit organisation would be willing to participate in a study in which its major gift fundraisers were disclosing personal information to major donors, who account for the majority of what most non-profits raise each year (Hartsook & Sargeant, 2010), without understanding the possible effects of that disclosure. In addition, the benefits of using vignettes in research include increased external validity by allowing the researcher to collect a data from many subjects at once; the ability to manipulate several variables at once; elimination of the observer effect, which states that the act of observation influences what is being studied; and prevention of some ethical concerns inherent in observational research or field studies (Eckerd et al., 2021).

The risks of vignettes include participants misunderstanding or not fully capturing the context that is conveyed in the setting described. 'A vignette needs to contain the information essential to understanding the context, or it may lead to a situation where the participant projects their own

experiences or knowledge to fill in the gaps,' (Eckerd et al., 2021, p.20). Vignettes that contain

hypothetical scenarios run the risk of not being realistic enough to direct the respondent's

thinking, resulting in hypothetical, rather than realistic responses (Hughes & Huby, 2004). In the

current research, participants are asked to respond to the questions following the vignette as if

they were the donor in the vignette. This may be a limitation of the current research because

Constant et al. (1994) note that studies about information sharing are prone to socially desirable

patterns of responding. Participants who encounter vignettes in research may respond based on

how they would behave, or based on how they think someone should behave in a similar

situation (Hughes & Huby, 2004). In addition, variables must be effectively manipulated in ways

that are meaningful to the participant and worded in a way that does not lead to the framing

effect, which influences participants' responses based on how information is worded (Eckerd et

al., 2021). Weighing the risks and limitations presented here, the researcher determined that steps

could be taken to mitigate the potential pitfalls of using vignettes, and that other options to

expose donors to fundraisers' self-disclosure without the use of vignettes would not be possible.

The steps taken to mitigate the risks and limitations of vignettes are described next.

As mentioned in Table 3.4, in developing the content for the vignettes, it is important that the

content is drawn from existing literature and practical experiences, and that the content portrays

a realistic scenario that is familiar to the participant (Skilling & Stylianides, 2020). The

researcher developed the vignettes based on an understanding of social penetration theory

(Altman & Taylor, 1973) and other self-disclosure-related research findings.

The survey was piloted with 15 donors and fundraisers prior to official data collection. Two of the 15 people pilot participants were major donors who had given a one-time gift of $10,000 or more to an institution of higher education. A more detailed discussion of the pilot study is included in section 3.4.5.

3.4.2 Phase 1: Variables and measures

This section describes the variables and measures included in the Phase 1 research. The current research investigates two independent variables: self-disclosure content and fundraiser gender. In this section, the independent variables are described first. Next, the other variables and measures are presented in the order in which they were included in the survey.

The literature review indicated that the content of a fundraiser's self-disclosure (i.e., what information the fundraiser was sharing with the donor) might affect participants feelings, and possibly their behaviour. For example, high depth disclosures increase feelings of closeness and commitment (Gore et al., 2006). First then, the researcher had to determine what type of disclosure content to investigate. Topics related to an individual's self-disclosure are limitless, however, the researcher identified three specific content areas that could be investigated. A description of the disclosure content types and a justification for the researcher's choice is provided in Table 3.5.

Table 3.5: Independent variable #1: self-disclosure content

Self-disclosure content	Definition	Example	Justification
Self-related	Disclosure related to oneself (versus someone else)	I come from a poor family.	The most basic definition of self-disclosure is any information about oneself that is shared with someone else (Altman & Taylor, 1973). Thus, self-related content was chosen as a variable in the current research.
Mission-related	Disclosure related to the non-profit organisation's mission (versus an unrelated mission). In this case, the study was conducted by fundraisers working in higher education, so the mission-related information is related to getting a college degree.	I wanted desperately to go to college, but my family didn't have the money.	Because fundraisers inspire donors' giving, it is expected that a fundraiser's mission-related self-disclosure will positively impact a donor's giving intention.
High-depth	High-depth disclosure includes information that reveals feelings, emotions, dreams and values (Altman & Taylor, 1973).	Sometimes by the end of the month, we did not even have food on the table.	High-depth disclosures communicate a level of closeness and deep connecting exists in a relationship (Laurenceau et al., 2004) and individuals in close relationships are more likely to make sacrifices for the other (Mills et al., 2004), thus is it expected that fundraisers' high-depth disclosures will positively impact a donor's giving intention.

Source: Author's creation

In addition, the researcher was interested in studying the effects of the fundraiser's gender on donors' giving intentions. Thus, Table 3.6 describes the second independent variable.

Table 3.6: Independent variable #2: Fundraiser gender

Variable	Definition	Measure	Reference
Independent Variable – Fundraiser's gender	In the current research, participants were randomly assigned vignettes that featured either a male fundraiser, called Lawrence, or a female fundraiser, called Julianna. These names were chosen because, according to U.S. census data, fewer than .005% of individuals in the U.S. have these names (US Census data, 2010) so it was unlikely that the participant would know someone either named Lawrence or Julianna, which could have been distracting during the survey or influenced their survey responses.	n/a	Author's creation

Gender is particularly relevant to the current research because the fundraising industry is dominated by female fundraisers (Breeze, 2017) and behaviours associated with relationship building and connecting with others are typically considered stereotypical female behaviours (Dindia & Allen, 1992). Because the findings on gender differences in self-disclosure have been small and/or inconclusive, the current research will contribute to existing knowledge by investigating whether the fundraiser's gender effects the relationship between the disclosure content and the donors' giving behaviours, but it is predicted that no difference will be found.

The additional variables and measures are presented in Table 3.7. The items are presented in the in the order in which they were included in the survey. Following the table, a justification is provided for each item.

Table 3.7: Phase 1: Survey Variables & Measures

Variable	Definition	Measure	Reference
Moderator – Moral identity	A self-definition that is organised around one's moral beliefs (Aquino & Reed, 2002). People who have high moral identity associate moral traits as being central to their self-concept.	Moral identity scale	Aquino & Reed II (2002)
Mediators 1 & 2–Communal Strength toward Fundraiser & Organisation	Communal strength is the extent to which individuals feel responsible for another, the cost individuals are willing to incur to meet the needs of the other, as well as how much distress individuals would feel if they could not meet the needs of the other (Mills et al., 2004).	Communal strength scale	Mills, Clark, Ford & Johnson, (2004)
Mediators 3 & 4– Connection to Fundraiser & Organisation	A feeling of emotional closeness (Reis & Shaver, 1988).	Connection Scale	Swaminathan, Stilley & Ahluwalia (2009)
Mediators 5 & 6 – Commitment to Fundraiser & Organisation	A desire to put in effort to maintain an ongoing relationship (Morgan & Hunt, 1994).	Commitment to the Relationship Scale	Morgan & Hunt (1994)
Dependent Variable – Giving Intention	The dollar amount an individual indicates they are willing to donate to an organisation.	Self-reported	n/a
Demographics	Characteristics of survey participants.	Self-reported	n/a

1. Moral identity scale

Aquino and Reed's (2002) moral identity scale was used to measure donor's internalization

dimension of moral identity. The self-importance of moral identity is a scale that measures the

extent to which collectively shared moral characteristics are important to one's self-identity

(Aquino & Reed, 2002). The moral characteristics used to measure an individual's moral identity

include kind, compassionate, fair, friendly, generous, hardworking, helpful, honest. Several studies have linked moral identity theory to helping behaviours. For example, Aquino and Reed (2002) found that individuals with high moral identity were more likely to have participated in volunteering or charitable activity than individuals with low moral identity. Similarly, Reed and Aquino (2003) found that individuals with high internalization dimension of moral identity donated more money to help individuals in need. In this research, it is predicted that stronger moral identity will strengthen, or moderate, the relationships between the other variables in the study.

2. Mediators 1 & 2–Communal Strength toward Fundraiser & Organisation

Communal strength is a quantitative measure of communal relationships (Mills et al., 2004). The communal strength scale measures the extent to which a person feels responsible for, the cost an individual is willing to incur to meet the needs of, as well as how much distress a person would feel if he/she could not meet the needs of another, in this case, an individual or organisation. Communal strength has been found to predict individuals' prosocial behaviours, including individuals with higher communal strength giving more help to a friend, (Mills, et. al., 2004, study 5). It is predicted that communal strength will help explain, or mediate, the relationship between a fundraiser's self-disclosure and a donor's giving intention.

3. Mediators 3 & 4– Connection to Fundraiser & Organisation

Swaminathan, Stilley and Ahluwalia's (2009) connection scale was used to measure the strength

of a donor's emotional connection to the fundraiser and the organisation. This scale has been

used in marketing contexts to measure an individual's feelings toward a business. The scale

measures the extent to which participants feel "connected", "bonded" and "attached" and in the

current research will measure the donor's feelings toward both the fundraiser and the

organisation.

4. Mediators 5 & 6 – Commitment to Fundraiser & Organisation

Commitment to the relationship was measured by Morgan and Hunt's (1994) scale. This scale is

widely used in marketing studies to measure an ongoing desire to maintain a relationship. It is

important to include in the current research because commitment to an organisation impacts how

individuals feel about their relationship with another and influences their behaviours. It is

expected that a donor's commitment to the fundraiser and the organisation will mediate the

relationship between a fundraiser's self-disclosure and the donor's giving intention.

5. Dependent Variable – Giving Intention

The participant's giving intention, the dependent variable in the study, was measured using a

sliding scale. The purpose of this measure was to determine how much a donor was willing to

give after a fundraiser's requested support. The relationship between the fundraiser's self-disclosure and the participant's giving decision was investigated.

6. Demographics

Demographic variables represent personal characteristics of a population. In this study, the demographic information collected included age, gender, ethnicity, highest level of formal education completed and current employment status.

3.4.3 Phase 1: Survey content

The study's theoretical framework guided the formation of the survey content, including questions, how the vignettes were developed, and the order in which information was presented. The information in Table 3.8 presents all content that was included in the survey in the order in which it was presented. Following the table, the researcher provides a rationale.

Table 3.8: Survey content

Section	Content	Measurement
	To complete this survey successfully, it is very important that you read the instructions carefully and understand what you are being asked to do. Thank you for your participation. Please start the study.	n/a
Section 1: Instructions	Title of Research: Fundraising Relationships What is the purpose of the study? The information individuals share with each other is known to influence how their relationship develops. However, it is still unclear how sharing information affects fundraising relationships. This research project investigates how the information we share influences the way fundraisers and donors feel about each other. Who can take part? We are asking donors of charitable organisations to take part in this research study by completing this survey. What do I have to do? You can take part in the study by answering the survey questions. It may take you 20 minutes to complete the survey. What will happen to the information that I give? Your survey responses will only be accessible to members of the research team and will be kept secure, in strict accordance with Plymouth University's data protection policy. An analysis of the compiled responses	I understand and accept the above statement. (checkbox)

	may be published. At a later stage, the findings may also be reported to academic or professional audiences in journals, presentations, or a book. Who are the researchers and who is funding the research? Deanna Nelson, Plymouth University, is the principal researcher. The research is being funded by Plymouth University. Can I withdraw from the study? You can withdraw anytime during the study. Please note: your name is not asked so we will not be able to trace your survey responses once they have been submitted. Will my participation be confidential? The questionnaire does not ask for your name or for any other information that might identify you. The information you provide will be held totally anonymously making it impossible to trace it back to you. Do I have to take part? Taking part in the study is entirely voluntary. If you would like further information about the study, please do not hesitate to contact Doctoral Researcher Deanna Nelson via deanna.nelson@plymouth.ac.uk at Plymouth University, Drake Circus, Plymouth, PL4 8AA, UK.	
Section 2: Moderator	Listed below are some characteristics that may describe a person. Kind, Caring, Compassionate, Fair, Friendly, Generous, Hardworking, Helpful, Honest	Keeping in mind these characteristics, please answer the question below.

Moral Identity Internalization	(The order in which the characteristics was presented was randomised for all participants.)	Likert scale 1-7: strongly disagree to strongly agree • It would make me feel good to be a person with these characteristics. • Being a person who has these characteristics is an important part of who I am. • I strongly desire to have these characteristics. (The order in which the statements were presented was randomised for all participants.)
Section 3: Vignette Instructions	Over the next few screens, you will read about a donor's experience at a hypothetical university, Carrolton University. As you read the experiences, please imagine that you are the donor. It may feel like there is a lot of material to read because we are trying to convey the development of a relationship that takes place over the course of several months or even years. After reading the material, we will ask you to reflect on the giving experience described. We appreciate that you take the time to read carefully and give your honest opinion.	n/a
Section 4:	Please imagine you have been a supporter of Carrolton University for ten years. Over that time, you have donated $12,500.	Please answer the question below. (1: strongly disagree, 7: strongly agree)

132

Vignettes Related to Carrolton University		How much do you personally agree with the belief that a higher education is important for young people to pursue?
	You believe that a college education is important, and you believe that Carrolton University is doing a good job educating students.	
		Please answer the question below. (1: strongly disagree, 7: strongly agree) Helping students is important to me personally.
	You support the scholarship programme at Carrolton University. You have always been thanked promptly for your support. You feel that your donations are being used appropriately to help students.	
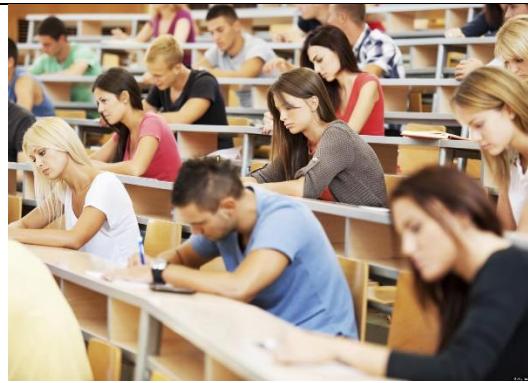
		Please answer the question below. (1: strongly disagree, 7: strongly agree) Helping students is important to me personally.
  Occasionally you receive handwritten thank you notes from the students who receive your scholarship support. Recently, you received a note from Melanie, who is the first person in her family to attend college. Your scholarship helped Melanie afford her tuition. She is studying to be a nurse and wants to work at a nearby children's hospital after graduation.		
  Another student who received your scholarship support, Cedrick, also wrote a note.		Please answer the question below. (1: strongly disagree, 7: strongly agree) Helping students is important to me personally.

	In the note, Cedrick said he is studying to be an engineer and wants to go on to graduate school after he finishes his studies at Carrolton University. Without your help, Cedrick would have been unable to afford college. Your scholarship helped Cedrick achieve his dreams of becoming an engineer.	
	  You want to help Carrolton University accomplish its mission to educate students.	Please answer the question below. (1: strongly disagree, 7: strongly agree) Supporting higher education is important to me personally.
Section 5: Vignettes Related to Relationship with Fundraiser	In the last few pages, we have asked you to image that you are a donor giving to Carrolton University and reflect on your feelings. Remember, you have been imagining that you have been a supporter of Carrolton University for ten years. During that time, you have only received mail and email messages from Carrolton University. Now, please imagine that Lawrence/Juliana, a fundraiser for Carrolton University, is working to create a personal relationship with donors. She/he calls to thank you for supporting Carrolton University.	Please answer the question below (1 = Extremely inappropriate, 7 = Extremely appropriate) How appropriate do you think it is for Lawrence/Juliana to invite you for coffee?

	She/he says she/he is reaching out to you and other supporters to personally express her appreciation. You tell Lawrence/Juliana that he/she's welcome. You say you love Carrolton University and the way it is preparing its students for the future. You and Lawrence/Juliana speak for about five minutes. Lawrence/Juliana invites you to get a cup of coffee at a coffee shop close to your house next week. She says she would like to get to know you better and to hear more about why you support Carrolton University.	
	You meet Lawrence/Juliana at the coffee shop. You talk about the sunny weather. Lawrence/Juliana is warm and welcoming. You are getting to know each other. You both talk about what part of town you live in, how long you have lived in the area, where you went to college and what you majored in. Lawrence/Juliana thanks you again for supporting Carrolton University for the past ten years. She/he reiterates that your support for scholarships has helped many students achieve their dream of a college degree. You tell Lawrence/Juliana that you love receiving the thank you notes from students, and that you would be interested in meeting some of the students in the future.	Please answer the question below. (1: strongly inappropriate, 7: strongly appropriate) Do you think the information Lawrence/Juliana is sharing with you is appropriate?

	Lawrence/Juliana says she will let you know when this can be arranged.	
	Two weeks later, Lawrence/Juliana calls to tell you about a scholarship luncheon that will be held at Carrolton University in a couple months. She/he says this may be an opportunity for you to meet some of the scholarship students. She/he invites you to have lunch so that she/he can tell you more about the event. You agree.	Please answer the question below. (1: strongly inappropriate, 7: strongly appropriate) Do you think it is appropriate for Lawrence/Juliana to invite you to lunch?
	You meet Lawrence/Juliana for lunch. She/he tells you that the scholarship luncheon will be held on campus about eight weeks from now. At the event, you will sit with several students who have received your scholarship support in the past. You will have a chance to talk to the students and get to know them personally. As you order your food, you discuss your favourite items on the menu. You talk about the latest edition of the Carrolton University magazine and the articles you liked the best. Lawrence/Juliana mentions her/his favourite articles, too. After your meal, you tell Lawrence/Juliana you would like to attend the luncheon and thank her/him for the invitation.	Please answer the question below. (1: strongly disagree, 7: strongly agree) Lawrence/Juliana is warm. Lawrence/Juliana is responsive. Lawrence/Juliana is caring. (The order in which the statements were presented was randomised for all participants.)
	Eight weeks later, you attend the scholarship luncheon. You sit at a table with Trey and Lexie, two students who received scholarship support from you. You learn that Trey is majoring in music therapy and wants to help individuals with developmental disabilities after graduating. You learn that Lexie is majoring in accounting and just found out she received an internship at a prestigious firm this summer. Both students work part-time jobs at the nearby grocery store. They both study hard and make good grades. They are so grateful for the scholarships you have given them. Neither of them could have attended college without your help. You feel	Please answer the question below. (1: strongly disagree, 7: strongly agree) Providing scholarships to students is important to me personally.

	proud to have been able to help them achieve their dream and inspired by their hard work and dedication. After an hour and a half eating lunch and talking with the students, you go home.	
	The next day, you call Lawrence/Juliana to thank her/him for inviting you to the luncheon. You tell her/him you want to do more to help students like Trey and Lexie. She/he asks what inspired you to make this decision. You feel close to Lawrence/Juliana. You tell her/him about your own experience in college. You were the first in your family to go to college. And it wasn't easy. You struggled academically. During your junior year, your dad got sick. You spent a lot of nights at the hospital, by his bedside, studying, reading and writing. Your dad encouraged you to work hard and graduate no matter what. Your professors put in extra hours and worked with you to make sure you were prepared for your exams. You would not have graduated college on time without their help. The kindness of your professors changed your life, and now you want to help others.	n/a
Each participant was randomly assigned to receive one of the following treatments:		
Section 6: Independent Variable SELF HIGH RELATED	Now, imagine Lawrence/Juliana shares with you the following information: "I know what you mean. My life was changed, too. Not as much by professors, but by my family. I came from a poor family. My mom worked hard, but we always struggled to make ends meet. My brother was really smart and always excelled at school. He wanted desperately to go to college, but we didn't have the money.	To what extent do you agree with the statements below? (1: strongly disagree, 7: strongly agree) The information Lawrence/Juliana shared is personal. The information Lawrence/Juliana shared is related to education.

	Sometimes by the end of the month, we did not even have food on the table.	The information Lawrence/Juliana shared is meaningful.
	After he graduated high school, my brother got a low-wage job at a restaurant to help pay the bills.	The information Lawrence/Juliana shared is revealing of his emotions.
	Because of his sacrifice, my family was able to save enough money so that I could have what he never had-- a chance to get a college degree."	(The order in which the statements were presented was randomised for all participants.)
	You could almost see the tears welling up in his eyes as he spoke.	
SELF HIGH UNRELATED	Now, imagine Lawrence/Juliana shares with you the following information:	To what extent do you agree with the statements below? (1: strongly disagree, 7: strongly agree)
	"I know what you mean. My life was changed too. Not as much by professors, but by my family.	
		The information Lawrence/Juliana shared is personal.
	I came from a poor family. My mom worked hard, but we always struggled to make ends meet.	
	My older brother was really smart and always excelled at school.	The information Lawrence/Juliana shared is related to education.
	He wanted desperately to go to college, but we didn't have the money.	
		The information Lawrence/Juliana shared is meaningful.
	Sometimes by the end of the month, we did not even have food on the table.	
	After he graduated high school, my brother got a low-wage job at a restaurant to help pay the bills.	The information Lawrence/Juliana shared is revealing of his emotions.
	Because of his sacrifice, my family was able to have more food so that I	

	could have what he never had - a chance to live without hunger." You could almost see the tears welling up in his eyes as he spoke.	(The order in which the statements were presented was randomised for all participants.)
SELF LOW UNRELATED	Now, imagine Lawrence/Juliana shares with you the following information: "I know what you mean. My life was changed too. Not as much by professors, but by my family. I came from a poor family. My mom worked hard, but we always struggled to make ends meet. My older brother was really smart and always excelled at school. But he wanted to be an artist. After he graduated high school, my brother won an art competition and earned enough money to rent a small studio space. Today he owns his own gallery and is a successful artist. Because of his success, my family was able to have more and better opportunities so that I could have what he had- a chance to follow my dreams." You could almost see the twinkle in his eyes as he spoke.	To what extent do you agree with the statements below? (1: strongly disagree, 7: strongly agree) The information Lawrence/Juliana shared is personal. The information Lawrence/Juliana shared is related to education. The information Lawrence/Juliana shared is meaningful. The information Lawrence/Juliana shared is revealing of his emotions. (The order in which the statements were presented was randomised for all participants.)
OTHER HIGH RELATED	Now, imagine Lawrence/Juliana shares with you the following information:	To what extent do you agree with the statements below? (1: strongly disagree, 7: strongly agree)

	"Your story reminds me of my co-worker, Darell. His life was changed too. Not as much by professors, but by his family. Darell came from a poor family. His mom worked hard, but his family always struggled to make ends meet. Darell's older brother was really smart and always excelled at school. Darell's brother wanted desperately to go to college, but they didn't have the money. Sometimes by the end of the month, they did not even have food on the table. After he graduated high school, Darell's brother got a low-wage job at a restaurant to help pay the bills. Because of his brother's sacrifice, Darell's family was able to save enough money so that Darell could do what his brother never had the chance to do - get a college degree." You could almost see the tears welling up in his eyes as he spoke.	The information Lawrence/Juliana shared is personal. The information Lawrence/Juliana shared is related to education. The information Lawrence/Juliana shared is meaningful. The information Lawrence/Juliana shared is revealing of his emotions. (The order in which the statements were presented was randomised for all participants.)
OTHER HIGH UNRELATED	Now, imagine Lawrence/Juliana shares with you the following information: "Your story reminds me of my co-worker, Darell. His life was changed, too. Not as much by his professors, but by his family. Darell came from a poor family. His mom worked hard, but they always struggled to make ends meet.	To what extent do you agree with the statements below? (1: strongly disagree, 7: strongly agree) The information Lawrence/Juliana shared is personal.

141

	Darell's older brother was really smart and always excelled at school. His brother wanted desperately to go to college, but they didn't have the money. Sometimes by the end of the month, they did not even have food on the table. After he graduated high school, Darell's brother got a low-wage job at a restaurant to help pay the bills. Because of his brother's sacrifice, Darell's family was able to have more food so that Darell could do what his brother never had the chance to do - live without hunger." You could almost see the tears welling up in his eyes as he spoke.	The information Lawrence/Juliana shared is related to education. The information Lawrence/Juliana shared is meaningful. The information Lawrence/Juliana shared is revealing of his emotions. (The order in which the statements were presented was randomised for all participants.)
Following the treatment, the mediators and dependent variable were measured as indicated below:		
Section 7: Mediator 1 – Communal Strength toward the fundraiser	Please imagine your relationship with Lawrence/Juliana. Indicate how much you agree or disagree with each statement (1: strongly disagree, 7: strongly agree) • I would go out of my way to do something for Lawrence/Juliana. • I would incur a large cost to meet the needs of Lawrence/Juliana. • Meeting Lawrence's/Juliana's needs is a high priority for me. • I would be willing to give up a lot to benefit Lawrence/Juliana. (The order in which the statements were presented was randomised for all participants.)	
Section 7: Mediator 2 –	Please imagine your relationship with Carrolton University.	

Communal Strength toward the organisation	Indicate how much you agree or disagree with each statement. (1: strongly disagree, 7: strongly agree) • I would go out of my way to do something for Carrolton University. • I would incur a large cost to meet the needs of Carrolton University. • Meeting Carrolton University's needs is a high priority for me. • I would be willing to give up a lot to benefit Carrolton University. (The order in which the statements were presented was randomised for all participants.)
Section 8: Mediator 3 – Connection to the fundraiser	Please imagine your relationship with Lawrence/Juliana. Please indicate how much you agree or disagree with each statement. (1: strongly disagree, 7: strongly agree) • I feel bonded with Lawrence/Juliana. • I feel I'm attached to Lawrence/Juliana. • I feel I'm connected to Lawrence/Juliana. (The order in which the statements were presented was randomised for all participants.)
Section 8: Mediator 4 – Connection to the organisation	Please imagine your relationship with Carrolton University. Please indicate how much you agree or disagree with each statement. (1: strongly disagree, 7: strongly agree) • I feel bonded with Carrolton University. • I feel I'm attached to Carrolton University. • I feel I'm connected to Carrolton University. (The order in which the statements were presented was randomised for all participants.)
Section 9: Mediator 5 –	Please imagine your relationship with Lawrence/Juliana.

Commitment to the fundraiser	Please indicate how much you agree or disagree with each statement. (1: strongly disagree, 7: strongly agree) • I am committed to maintaining my relationship with Lawrence/Juliana. • I am oriented toward the long-term future of my relationship with Lawrence/Juliana. • My relationship with Lawrence/Juliana is something I am very committed to. (The order in which the statements were presented was randomised for all participants.)
Section 9: Mediator 6 – Commitment to the organisation	Please imagine your relationship with Carrolton University. Please indicate how much you agree or disagree with each statement. (1: strongly disagree, 7: strongly agree) • I am committed to maintaining my relationship with Carrolton University. • I am oriented toward the long-term future of my relationship with Carrolton University. • My relationship with Carrolton University is something I am very committed to. (The order in which the statements were presented was randomised for all participants.)
Section 11: Dependent Variable – Giving Intention	Now, imagine that Lawrence/Juliana asked you for a donation to support Carrolton University's scholarship programme. The slider below indicates support in $1,000 increments. Please indicate how much you would be willing to donate, so that 0 = $0 and 10 = $10,000. How much would you be willing to contribute (in thousands of dollars)?
Section 12: Demographics	What is your age? (Number only)
	What is your gender? Male

	Female Other/Prefer not to say
	What is your ethnicity? - Selected Choice Caucasian African American Asian/Pacific Islander Hispanic Native American Middle Eastern Other (please specify)
	What is the highest level of formal education you have completed? High school diploma College degree Master's degree PhD, MD, JD
	Are you currently working? Full-time Part-time Not working

The rationale for the choices made during the survey design process is included here. First, the survey began with instructions stating the importance of reading the survey information carefully, responding honestly and thanking them for participating in the process. Next, study information was presented to participants to explain the purpose of the research and obtain consent. Participants indicated their consent by clicking a checkbox.

After instructions and study information were presented, the researcher included a measurement of the moderator, moral identity internalization (Aquino & Reed, 2002). The moderator was measured first so that responses were not influenced by the presentation of independent and mediating variables that follow.

The next section included a set of instructions preparing participants for the vignettes with which they were about to be presented. The rationale was based on recommendations from Skilling and Stylianides (2019) to familiarise any participants who may not have been familiar with the use of vignettes in a survey, as well as to help participants understand from what perspective they should be responding to survey questions. The researcher also wanted to prepare participants that were would be a lot of text to read, and to explain that the reason for the text was to convey the development of a relationship that could take years to unfold in real time.

The first series of vignettes included in the survey contain five scenarios that describe a hypothetical donor's giving experience at a hypothetical university. A hypothetical university was chosen for this study because the researcher was unable to determine whether participants had interacted with fundraisers who had disclosed in the past. Thus, the researcher used vignettes

to develop a hypothetical but realistic experience for participants to imagine. The first five vignettes described a donor's giving experience. In addition to text, the first set of vignettes contained images, colour photographs, that reflected a positive collegiate environment and experience. Images are often used in self-administered surveys and questionnaires and can be used to convey additional information to participants (Couper et al., 2004). The rationale for choosing positive images (i.e., students engaged in learning and smiling; clean, generic college campus) were chosen to help convey a positive giving experience for the donor. In addition, the images break up several pages of text to make the experience of filling out the survey more enjoyable for participants.

The text associated with the images describes the university as being effective and the donor having positive feelings about the institution and higher education in general. The vignettes describe the donor being happy with the communication from the institution and feeling as though the donor's past support was appreciated and conveying that the donor would like to continue supporting the institution. These positive images and the description of a positive donor relationship were included in the study to create an ideal hypothetical scenario in which self-disclosure could occur, as it is unlikely that either a fundraiser or a donor would be building a strong, genuine connection utilizing self-disclose if they were dissatisfied with the university, its work, or its impact on students.

In the first series of vignettes, participants were asked to take the perspective of a hypothetical donor who has supported Carrolton University over the past ten years, giving a total of $12,500. Carrolton University was chosen as the name of the fictitious university because no such

147

institution is known to exist, based on a google search conducted by the researcher at the time of survey design. Ten years was chosen as an appropriate timeframe for this setting because long-time supporters are more likely to have close, communal relationships with the organisations they support (Waters, 2008). The donation amount, $12,500, averages to $1,250 per year. This amount was chosen based on practitioner texts that indicate that donors who give at this level are considered mid-level donors (Sargeant & Shang, 2010) and mid-level donors are often cultivated by fundraisers to determine their interest and capacity in making a major gift. The vignettes describe several relationship fundraising strategies (i.e., handwritten thank you notes from beneficiaries, prompt acknowledgement of gifts) used to describe a positive giving experience for the imaginary donor (Hartsook & Sargeant, 2010). According to Skilling and Stylianides (2019), vignettes should reflect the practical experiences of individuals in similar "real life" situations. Fundraisers who piloted the survey were asked to reflect on how realistic the hypothetical donor (and other aspects of the scenarios described in the vignettes) was. When feedback was given that aspects of the vignettes did not match fundraisers' experiences, the survey was edited to reflect a more realistic representation. The pilot is discussed in more detail in section 3.4.5.

On each page containing a vignette in this section, an attention question was included. The rationale for including this was to ensure the participants were closely reading the content and engaged with the survey material.

The next section contained a series of four vignettes that describe the donor's relationship with a hypothetical fundraiser at Carrolton University. Participants were randomly assigned vignettes

148

that featured either a male fundraiser, called Lawrence, or a female fundraiser, called Julianna.

These names were chosen because, according to U.S. census data, fewer than .005% of

individuals in the U.S. have these names (US Census data, 2010) so it was unlikely that the

participant would know someone either named Lawrence or Julianna, which could have been

distracting during the survey or influenced their survey responses. As noted in Table 3.8, the

only difference between the vignettes featuring Lawrence and Julianna were the names and the

pronouns used.

Drawing on social penetration theory (Altman & Taylor, 1973), the vignettes described

interactions between a donor and a fundraiser as they are developing a new relationship. The

researcher chose to describe a developing (vs established) relationship because more disclosure

occurs when two people are going through the process of getting to know each other (Altman &

Taylor, 1973). Participants are presented with a series of vignettes that describe the fundraiser

and donor meeting for coffee, having telephone conversations and meeting for lunch. Over each

of these interactions, the fundraiser and donor exchange information that aligns with social

penetration theory (Altman & Taylor, 1973) – that is, the pair begins by sharing superficial

information (i.e., weather, the college attended, where you live), then they advance toward

discussing preferences (i.e., items on the menu, favourite magazine articles) and more intimate

information as they interact. This aligns with social penetration theory which says that self-

disclosure occurs in phases as relationships develop. Using an onion as a metaphor, individuals

peel back "layers" of their core self slowly over time, first sharing information that is part of the

individual's public self, and later revealing information about one's private self only to close

149

others (Carpenter & Greene, 2015). As with the vignettes used in the prior section, these were vetted by fundraisers and donors when the study was piloted.

The fourth and final vignette in this section describes a scenario in which the donor discloses a personal story to the fundraiser. The rationale for including this once again ties back to social penetration theory and other self-disclosure research which finds that self-disclosure is reciprocal – once one person discloses, there is an expectation that the other person will, too (Altman & Taylor, 1973). Other research findings from the marketing literature have found that in a professional setting it may be more appropriate to reciprocate self-disclosure than to initiate it (Hayotko, 2004).

The purpose of this series of vignettes was to describe more specific scenarios (i.e., interactions between one donor participant and one fundraiser), rather than general scenarios (i.e., describing the overall feeling that the donor participant has about the institution). For this reason, the researcher chose not to use images in this section of the survey. Also, once again, attention questions were asked on each page featuring a vignette in this section to ensure participants were paying attention to the survey content and reading the material carefully.

Next, participants were randomly assigned to receive one of five treatments which varied based on the type of information the fundraiser disclosed. All treatments were worded carefully and varied only slightly based on the type of information that was shared to prevent confounds (Skilling & Stylianides, 2019). For example, the 'self' scenarios said, "I know what you mean. My life was changed, too," and the 'other' scenarios said, "Your story reminds me of my co-

worker, Darrel. His life was changed, too…" The aim of the current study was to determine the predictive power of the content of a fundraiser's self-disclosure, thus, aspects related to its content were the focus of the scenarios containing the treatment/independent variables. Note that the 'Darrel' vignette is a comparator case, investigating the effect of self-related versus other-related (i.e., Darrel-related) information.

Following the treatment, participants responded to scales measuring the mediating variables included in the study. Once again, the mediating variables included: communal strength, connection, and commitment. Because the researcher was interested in whether fundraisers' disclosure can be related to how donors feel about the organisations that fundraisers represent, each of these three mediators was measured for donors' feelings 1) toward the fundraiser and 2) toward Carrolton University.

The next section measured the dependent variable, a donor's giving intention. Participants were asked to imagine their relationship once again with Lawrence/Julianna, and that they had been asked for a donation to support Carrolton University's scholarship programme. It was expected that participants who had received the self-related, high-depth, mission-related self-disclosure from the fundraiser would choose a higher giving intention amount.

The final section of the survey collected demographic information from participants. In this section, participants were asked a series of personal characteristic questions (i.e., age, gender, education, etc.). This data was collected for informational purposes only. Income was not chosen as a question in this section because it was indicated de facto because the criteria for

participating in the study was making a significant financial contribution to Indiana University ($10,000+).

3.4.4 Phase 1: Participants

During Phase 1, survey participants were major donors from Indiana University. For this phase, the researcher sought to recruit a large non-profit organisation supported by many major donors, to obtain a significant sample size for the study. Higher education was chosen as an ideal context in which to conduct this study because higher education receives more philanthropic contributions than all other sectors in the U.S., except for religion (Giving USA Foundation, 2020). The researcher approached several employees of universities and university foundations in the Midwest with a description of the study and its purpose. Indiana University Foundation indicated they were interested in the research and willing to participate in the project. Indiana University Foundation is an independent non-profit organisation that solicits tax-deductible private donations to support Indiana University. In 2020, the foundation raised more than $640 million in support from 98,248 donors. In total 148,383 donations were made ranging from $1-$145 million (Indiana University Foundation 2020 annual report).

Next, the researcher worked to determine which of the foundation's donors should be included in the study. The current research is interested in relationships that are built between fundraisers and major donors, thus, determined to focus on this population of donors. Because a precedence has been set with prior researchers identifying major donors as those who have made a one-time

donation of $10,000 or more (Waters, 2008), the researcher used the same criteria for the current study.

In determining the appropriate sample size for the study, the researcher considered the research question, size of the population, risk for potential mistakes and the allowable sampling error (Black, 1999). The sampling error relates to the level of precision the researcher will have in applying the findings from the sample to the larger population (Israel, 1992).

The researcher considered several options for choosing an appropriate sample size, including using a census, adopting a sample size from a similar study, using a published table, or using formulas to calculate sample sizes based on a given set of criteria (Israel, 1992). This researcher determined that using a published table would be the ideal choice for determining sample size. A census is typically used for smaller populations (e.g., 200 or less) because of the cost and nearly everyone in the population would have to be sampled to achieve an appropriate sampling error and using the same sample size from a similar study puts the researcher at risk of repeating errors that may have occurred in the other study (Israel, 1992). Using a published table can provide the researcher with a sample size given a set criterion, for example, the sample size for a specific precision and confidence level (Israel, 1992). Formulas are typically used when different combinations of precision and confidence than those available in a table (Israel, 1992). The table used to calculate the sample size for this research project is included in Table 3.9.

153

Table 3.9: Criteria to determine appropriate sample size

Size of Population	Sample Size (n) for Precision (e) of:			
	+/-3%	+/-5%	+/-7%	+/-10%
500	a	222	145	83
600	a	240	152	86
700	a	255	158	88
800	a	267	163	89
900	a	277	166	90
1,000	a	286	169	91
2,000	714	333	185	95
3,000	811	353	191	97
4,000	870	364	194	98
5,000	909	370	196	98
Sample size for +/-3%, +/-5%, +/-7% and +/-10% Precision Levels Where Confidence Level is 95% and P=.5.				
a = Assumption of normal population is poor. The entire population should be sampled.				

Source: Israel, 1992

The Indiana University Foundation staff estimated they had 3,000 major donors who had given a one-time gift of $10,000 or more at the time the survey was distributed. Thus, the ideal sample size was determined to be 353 at a precision level of +/-5% and a confidence level of 95%. This precision level and confidence level were chosen because they are common in quantitative research. The survey was distributed to all donors who met the criteria and were over the age of 18 and 509 responses were collected.

3.4.5 Phase 1: Procedures

3.4.5.1 Prior to data Collection

Prior to data collection an application for ethical approval of research was submitted to the Faculty of Business Research Ethics Committee. The form was submitted on March 20, 2018, and approved on June 1, 2018. The approval letter can be found in Appendix 1.

Data was collected, organised, and stored in accordance with the University of Plymouth's Research Data Management Principles. Data management plans were established before the project began to ensure success. Participants provided informed consent and confidentiality was assured – no identifiable personal information was collected or stored.

The survey was piloted prior to data collection to ensure the vignettes were presented in a way that was meaningful for donors and representative of their real-world experience. In addition, pilot testing helped to check the instrument to ensure information was presented in the order and manner intended, that randomization occurred in the appropriate sections and that data was accessible to the researcher via the online Qualtrics platform. Modifications to the survey were made according to feedback from the pilot test, for example, the wording in some of the sections was adjusted for clarity.

To collect data from participants, the researcher shared the survey link with a representative from the Indiana University Foundation, who then sent the link to eligible individuals (i.e., individuals over the age of 18 who had made a one-time donation of $10,000 or more to the Foundation).

The initial email was sent by the Foundation on August 27, 2018. A follow-up email was sent by the Foundation one week later, on September 3, 2018. From the email, participants clicked on the link and completed the survey.

3.4.5.2 After data collection

Once participants completed the survey, responses were documented in the Qualtrics software programme online and accessible to the researcher as they were completed. Because the recommended sample size was achieved and responses had stopped coming in, data collection ceased after three weeks. The data file was downloaded from Qualtrics, and the researcher followed best practices for preparing the data for analysis. The researcher completed the following steps (Fowler, 2014), which are described in more detail below:

1. Designing the code

2. Coding

3. Data cleaning

1. Designing the code

Designing the code entails developing a set of rules that helps translate participant answers into numbers. For example, the researcher constructed a code assigning values to Likert scale responses, reverse-coded questions, and variable names.

2. Coding

During the coding process, the researcher utilised the classic method of listwise deletion, or complete case analysis (Cole, 2008), and first sorted participant responses based on those that were complete and incomplete. Listwise deletion is a common practice in social science research (Myers, 2011), however, it is not without criticism. For example, a nonresponse bias can be present in studies that utilise listwise deletion, whereby the complete versus incomplete responses capture different information (Groves & Peytchava, 2008). This may be a limitation of the current research and should be noted. However, the researcher determined that complete survey responses were necessary to investigate the relationship between all the variables included in the survey. For example, the final series of questions in the survey asks for participant demographic information, including the participant's gender. Without this response, it would be impossible to determine whether male or female donors respond differently to the male or female fundraisers featured in the vignettes, an important control variable used during the statistical analysis. In short, the primary benefit of listwise deletion is simplicity (Shafer & Graham, 2022). Listwise deletion reduces confusion among readers when the N for various responses is different.

Complete responses were indicated with a 100 (i.e., 100%) in the "progress" field in the CSV file. Analysis was conducted only on those responses that were 100% complete. Next, the researcher assigned numeric values to Likert scale responses. All responses were assigned values 1 – 7 with Strongly Disagree assigned a 1 and Strongly Agree being assigned a 7. Four questions in the questionnaire need to be reverse coded. Reverse coding is necessary when survey

157

questions are phrased in negative way. Scale measurements that consisted of multiple questions were added together and combined into a new variable. This combined variable was used for analysis and the change was documented in SPSS Output files.

SPSS is a software package designed for in-depth statistical analysis for social science. The researcher chose to use SPSS for data analysis because it is one of the most widely used computer programmes and focuses exclusively on variable-based statistical analysis.

3. Data cleaning

Data cleaning entailed checking the data for completeness and accuracy. Descriptive statistics were run to summarise the data collected, including mean, median and mode of variables. Frequencies were run and compared to original data to ensure all variables were re-scored correctly. Dispersion of data was measured using standard deviation. Internal consistency was checked for all scales. Cronbach alpha scores for all scales ranged between .823 and .928. Inferential statistics were used to further explore the data and determine what conclusions might be drawn. In addition, independent sample t-tests were performed on the male and female treatment groups and there was no statistical difference between them, thus they were collapsed into a single variable and will be discussed as such in further analysis.

Selecting appropriate statistical tests

To select the appropriate statistical tests, the researcher considered the research questions and the study's aims and objectives. One of the key objectives of the Phase 1 research was to investigate variables that moderate and mediate the relationship between a fundraiser's self-disclosure and a donor's giving intention. Thus, the research questions called for a moderated mediation analysis to determine whether an indirect effect is conditional on values of the moderating variable (Edwards & Konold, 2020).

Moderation and mediation analyses help provide a deeper explanation of how two variables (for example, X and Y) are related. It can be helpful to think of moderation as answering questions about when something occurs and mediation as answering questions about how something occurs. Moderating variables are variables that intensify (or diminish) the relationship between two other variables. Mediating variables are intervening variables that test why or how two variables may be related (Edwards & Konold, 2020). Thus, mediating variables help translate X's effect on Y. When moderation and mediation analyses are combined into one model, researchers can explain more complex relationships. This type of analysis is helpful when researchers are investigating both why and how variables are related to one another, as with the current research. The question in this research is whether moral identity (W) effects the relationship between a fundraiser's self-disclosure (X) on donors' giving intention (Y), mediated by feelings of communal strength, connection and commitment (M) toward both a fundraiser and the organisation donor's support. The diagram below demonstrates how single variables interact with one another during moderated mediation analysis:

159

Figure 3.1: Simple moderated mediation analysis
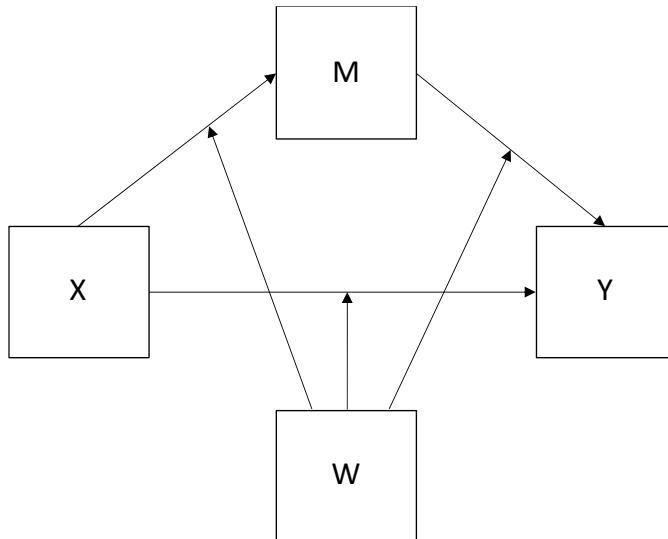
To conduct a moderated mediation analysis, an additional software programme called PROCESS must be added to SPSS. PROCESS is a tool that simplifies many of the mediation and moderation analyses in SPSS, allowing for more complex analyses, especially for conditional interaction models, as is being investigated in the current study (Hayes, 2018). PROCESS uses an ordinary least squares or logistic regression-based path analytic framework for conditional indirect effects in moderated mediation models with a single or multiple mediators (Hayes & Scharkow, 2013)

Unlike SPSS, PROCESS can generate bootstrap confidence intervals, which directly estimate the size of indirect effects, demonstrate higher power and greater control over Type I errors and rely on fewer assumptions about sampling distribution (Hayes & Scharkow, 2013).

The PROCESS macro comes with 92 template models built into its programme based on combination of variables and the effects that can be tested. Using the models provided, an ordinary least squares (OLS) regression was conducted. OLS is used to analyse relationships between independent, dependent, and mediating variables. A simple linear regression allows you to estimate how a dependent variable changes as result of the independent variable, however, using OLS regression modes, one must 'assume that the relationship between the variables in the model are linear in nature, or at least approximately linear,' (Hayes, 2018; p. 69). With OLS method, the line that minimises the sum of the squared errors (the distance between the line and each observation) is said to be the ideal line (Hayes, 2018).

Other data analysis alternatives were considered. For example, the researcher considered Structural Equation Modelling, or SEM. However, it has been argued that the complexity of SEM is a disadvantage and that researchers should choose a simpler model, such as OLS, when their data fits both options (Nazim & Ahmad, 2013). Thus, the researcher chose to conduct the analysis using OLS regression technique.

In the literature, two approaches for determining statistical inference about conditional indirect effects can be taken. The first is the normal theory approach, which can be used to obtain 'regions of significance' (Preacher et al., 2007, p. 200). However, this approach has limitations, including that it is lower in power than the other popular approach, bootstrap sampling (Hayes, 2017). In addition, the normal theory approach assumes a normal shape of the sampling distribution of the indirect effect. Rather than the normal theory approach, Hayes (2018) recommends using the bootstrap confidence intervals approach, which 'estimates the sampling

distribution of the conditional indirect effect nonparametrically through bootstrapping and then

uses information from the bootstrap sampling distribution to general confidence intervals for the

conditional indirect effect', (Preacher et al., 2007, p. 198). Bootstrapping does not make

assumptions about the shape of sampling distribution (Hayes, 2018), which makes it the

preferred approach for this research project.

An overview of the variables and constructs measured is included in Table 3.10, followed by a

description of the methods used for each of the hypotheses investigated during Phase 1.

Table 3.10: Variables included in the current research

	H1	H2	H3	H4	H5	H6	H7	H8
X1	Disclosure Content		Disclosure Content		Disclosure Content		Disclosure Content	
X2		Fundraiser Gender		Fundraiser Gender		Fundraiser Gender		Fundraiser Gender
M1			Communal Strength – Fundraiser	Communal Strength – Fundraiser				
M2			Communal Strength – Org	Communal Strength – Org				
M3					Connection – Fundraiser	Connection – Fundraiser		
M4					Connection – Org	Connection – Org		
M5							Commitment – Fundraiser	Commitment – Fundraiser
M6							Commitment – Org	Commitment – Org
W	Moral Identity	Moral Identity	Moral Identity	Moral Identity	Moral Identity	Moral Identity	Moral Identity	Moral Identity
Y	Giving Intention	Giving Intention	Giving Intention	Giving Intention	Giving Intention	Giving Intention	Giving Intention	Giving Intention

The following paragraphs outline the methods used for each of the hypotheses investigated during Phase 1.

The analysis required for hypotheses 1 and 2 is a simple moderation. So, the variables were analysed using PROCESS model 1 within SPSS at a 95% confidence interval. In this model, the relationship between two independent variables (X1 and X2) on the dependent variable (Y) were compared, and moral identity (W) was included as a moderating variable. Covariates held constant were ethnicity, education, gender, and age.

The remaining hypotheses (Hypotheses 3, 4, 5, 6, 7 and 8) included both mediator and moderator variables. Thus, a conditional process analysis, called moderated mediation, was required. The researcher used a custom PROCESS model within SPSS, once again at a 95% confidence interval. In this model, two independent variables were included (X1 and X2). Parallel mediating variables included: communal strength – fundraiser (M1), communal strength – organisation (M2), connection – fundraiser (M3), connection – organisation (M4), commitment – fundraiser (M5), and commitment – organisation (M6). Moral identity (W) was included as a moderating variable and giving intention was included as the dependent variable (Y). Covariates held constant were ethnicity, education, gender, and age.

After data from Phase 1 was analysed using the statistical tests described, the results indicated few statistically significant findings. The limitations of using vignettes to convey a realistic self-disclosure situation for participants could have contributed to the lack of significant findings and prevented the research questions from being answered. Thus, the researcher determined that

additional qualitative data was necessary to explain the non-significant results from Phase 1.

Because the researcher's primary interest was related to the fundraiser's disclosure and its effect

on the fundraising relationship, the second phase of the research shifts its attention to the

fundraisers themselves and how (or whether) they utilise self-disclosure in building relationships

with major donors. Thus, the donor-focused variables from Phase 1 of the study (commitment,

communal strength, connection and moral identity) are not investigated further in Phase 2. The

researcher hypothesised that if the vignettes did not accurately capture how fundraisers disclose

to donors during the fundraising process, more research was needed to understand the process of

how (or whether) fundraisers disclose and how they perceive their disclosures affect the donor

and their relationship. The next section provides a discussion of and justification for the

researcher's choice of semi-structured interviews as an appropriate method for the qualitative

Phase 2.

3.4.6 Phase 2: Research Design

3.4.6.1 Validity and Reliability

Similar to the Phase 1 research, issues of validity and reliability were considered early in the

research design. In qualitative research, validity and reliability are determined differently than in

quantitative research. For example, Cresswell and Miller (2000) identified nine "validity

procedures" (p. 126) for qualitative research. They argue that a researcher must adopt one of

more of these nine procedures to establish validity in their work. The current research adopts

three of these procedures, including triangulation, audit trail and thick, rich description. Each is

described in Table 3.11.

Table 3.11 Phase 2 validity procedures adopted

Validity procedure adopted	Description
Triangulation	Triangulation involves the use of multiple data sources (i.e., interviews) to develop an understanding of a phenomenon and identify themes
Audit trail	Validity is established by individuals external to the project who review detailed evidence of steps taken along the way of conducting the research. This approach is common in highly structured research, such as dissertations (p. 128).
Thick, rich description	Thick, rich descriptions are used in qualitative research to provide a detailed account of a social phenomena. Thick, rich descriptions are characterised by a high level of contextual detail, including unobservable data (like tone of voice).

Source: Cresswell & Miller, 2000

Additionally, Guba and Lincoln (1981) argue that validity and reliability in qualitative research can be achieved by establishing trustworthiness in research. They recommend specific strategies which align with Creswell and Miller's (2000) validity procedures, such as negative cases, peer debriefing, prolonged engagement and persistent observation, audit trails and member checks. Using Guba and Lincoln's (1981) definitions, the current research utilised persistent observation and audit trails. In addition, Guba and Lincoln (1981) advise that the characteristics of the researchers are an important aspect of achieving trustworthiness (i.e., validity and reliability) in researcher, and they recommend that researchers should be responsive and adaptable, sensitive and proficient in clarifying and summarizing information, which the researcher has attempted to do.

Semi-structured interviews

Interviews are a common data collection method in qualitative research, and semi-structured interviews are the most frequently used interview format (DiCicco-Bloom & Crabtree, 2006). Semi-structured interviews can be conducted face-to-face, as with the current research, as well as via telephone or email (Creswell, 2009), and with an individual or group (Kallio et al., 2016). The current research utilises face-to-face interviews with an individual fundraiser. Semi-structured interviews were chosen as the ideal method for the current research for several reasons.

First, semi-structured interviews are a good compliment to quantitative data (Galletta, 2018) and are used frequently in mixed methods research (Creswell & Plano Clark, 2018). They provide enough structure to investigate specific aspects of a research question, while also allowing for flexibility for interesting new findings to emerge (Galletta, 2018). Semi-structured interviews can include questions informed by theory, as is the case with the current research which built interview questions off quantitative data from Phase 1, but also provides space for participants to describe their unique perspectives and experiences.

Second, semi-structured interviews allow for rich and detailed descriptions of a complex phenomenon (Kallio et al., 2016). By providing participants with the freedom to describe the meaning and perceptions of a situation or experience, a deeper understanding of a human or social problem can be achieved (Creswell, 2009). This process opens up new possibilities, particularly when investigating topics that require attention to the context and unique aspects of

the phenomena being studied (Galletta, 2018). In the current research, a deeper understanding of how fundraisers use self-disclosure in their interactions with donors is needed to help explain non-significant results from Phase 1.

Finally, semi-structured interviews are extremely flexible, and allow the researcher to probe key areas of interest or ask follow-up questions to fully flesh out a topic covered during the interview process (Kallio et al., 2016). Interviewers and interviewees can participate in back-and-forth interactions which provide interviewers the opportunity to ask clarifying questions, confirm their understanding of responses and critically reflect on participants' descriptions (DiCicco-Bloom & Crabtree, 2006).

Other qualitative data collection methods the researcher considered included structured interviews, focus groups or direct observations. As the name implies, structured interviews are more rigid than semi-structured interviews and require that researchers ask all participants the same questions in the same order without deviation (Creswell, 2009). Because the current research was interested in acquiring rich detail and explanations of a complex phenomenon, the researcher determined that a more rigid interview approach would not allow the research questions to be fully answered. Similarly, focus groups can provide in-depth understanding from the participants' perspective, however, this technique encourages the facilitator to ask questions of the group and encourage the group members to interact with each other (Silverman, 2016) and because the current research was interested in the experiences of individual fundraisers, it was also deemed inadequate. Finally, direct observations were considered, but they would have been too time consuming, and the researcher anticipated difficulty in identifying willing participants.

Interview protocol

Once the format of the interviews was determined, the researcher began to develop the interview protocol. This stage of the research involved the first point of integration. As a reminder, integration is an important part of a sequential explanatory approach and occurs when both quantitative and qualitative methods are combined (Ivankova et al., 2006). The researcher used the data from the quantitative Phase 1 results to develop the interview protocol for Phase 2, as recommended by Creswell and Plano Clark (2018). Interview questions were developed to understand fundraisers' lived experiences utilizing self-disclosure in their interactions with major donors, and to investigate their perceptions of how their self-disclosure impacts relationship development and donors' giving behaviours.

As is recommended (Kallio et al., 2016), the protocol began with an introduction and series of warm-up questions. The purpose of these questions was to build rapport with the participant, help break the ice and make them feel comfortable with the interview process. After thanking participants for taking part in the study, the researcher asked the following questions:

1. What is your current title?
2. What is the name of institution for which you work?
3. How long have you worked as a major gift fundraiser? What made you decide to pursue a career in major gifts?
4. Please tell me about some of your preferred strategies to build relationships with major donors.

5. One of the key tenents of relationship fundraising is understanding your donor's values, hopes, dreams, thoughts about legacy so that you can make a connection to a need at your university. How do you get donors to open up and talk about themselves so that you can begin to understand them on a deeply personal level?

6. Next, I would like to hear about whether you have ever shared personal information or a personal story about yourself with a donor. If so, please tell me about your experience.

After the warm-up questions, the researcher asked participants a series of questions more in-depth questions that tied back to the Phase 1 quantitative research. The questions and rationale for each is provided in Table 3.12.

Table 3.12: Interview protocol questions and rationale

Research Question Addressed	Question No.	Questions and Probes	Rationale
1 & 2	1	What was your relationship like with the donor prior to sharing your personal story or information? • Probe: How long had you known the donor? • Probe: How often did you interact? • Probe: What were your interactions like? Ask about social events, committee meetings, face-to-face visits?	The protocol was designed to focus on three sections that cover the self-disclosure process: 1) pre-disclosure context and decision making, 2) the act of disclosing, and 3) effects/consequences of the disclosure. This aligns with Omarzu's (2000) disclosure decision model and social penetration theory (Altman & Taylor, 1973).
1 & 2	2	Please think back to the time before you shared any personal information with the donor. How well did you feel you knew him/her at that time? • Probe: What type of information had she/he shared with you prior to you sharing information about yourself? • Probe: At this point in your relationship, was there anything you were hoping to learn or trying to figure out about your donor?	This question tied back to social penetration theory (Altman & Taylor, 1973) and helped indicate what stage the relationship was in when self-disclosure occurs. Here, the probes helped establish whether the donor was sharing a lot of information prior to the fundraising sharing his/her information. This is related to reciprocation, which is a key element of the conceptual framework used in Study 1. Also, the probes investigated whether the fundraiser may be sharing her/his personal stories to inspire the donor to share more or different information. This ties back to previous self-disclosure research (Greene et al., 2006) that says that sometimes people disclose instead of asking a direct question. (For example, instead of saying, "Are you divorced?" The person may say, "I got divorced last year," in the hopes

1 & 2	3		

			that the other person may respond with similar information.) The probes also tied back to the disclosure decision model (Omarzu, 2000), which says that disclosures can help individuals accomplish their goals (i.e., learning more about a donor to build a stronger relationship or better facilitate a solicitation).
1 & 2	3	Let's talk now about <u>making the decision</u> to share a personal story or personal information with your donor. Prior to sharing, can you describe what were you feeling? • Probe: Did you make a conscious decision to share this information? Did you deliberate, or did you share this information spontaneously? • Probe: Did you make the decision in the moment, or had you previously decided that this donor would be "safe" to share this type of information with? • Probe: Did you consider the risks of sharing this personal information? How did you know it would be "OK" to share it? • Probe: Did you consider the rewards of sharing this personal information?	This ties to Omarzu's (2000) disclosure decision making model, especially in considering the probe which asks the participant to consider the risks and rewards that may be associated with disclosing. Also, it may be important to understand how fundraisers make decisions about when and whether to disclose information to donors. This could help inform training or professional development for fundraisers who are wondering how to navigate situations in which they are sharing personal information, or it could help managers understand how to coach fundraisers to, for example, make more deliberate and thoughtful decisions when it comes to disclosing personal information to donors.
1 & 2	4	Thinking about the time when you shared personal information with a donor, how was that information received by the donor?	These next questions once again tie back to social penetration theory and the idea that for self-disclosure to benefit a relationship it must be considered appropriate by the person who receives it. It also ties back to more

		• Probe: What did the donor say or do immediately after you shared your story? • Probe: How did that reaction make you feel in the moment?	contemporary research on self-disclosure which emphasises the reaction of the recipient after disclosure occurs. If Person A discloses to Person B and Person B listens closely and responds warmly to Person A's disclosure, their relationship is strengthened (Reis & Shaver, 1988).
1 & 2	5	Have you ever felt pressure from donors, your supervisor or colleagues to share personal information about yourself with donors? • Probe: Has anyone ever asked you to share more information than you are comfortable sharing? • Probe: Did donors ask you to share information directly, or did they imply they wanted to know more you in a more subtle way? • Probe: Do you modify how much information you share based on the personality or communication preferences of the donors you're working with?	This question and the probes that follow consider potential ethical dilemmas related to self-disclosure and might help explore potential power dynamics, especially with donors/fundraisers and supervisors/ fundraisers if fundraisers are being asked to do something with which they are not comfortable.
3	6	Do you think the typical major gift fundraiser shares personal stories with donors? • Probe: Do you think that's different for male/female fundraisers?	This question attempts to explore fundraisers' perceptions of gender differences in self-disclosure among their peers of the same or opposite gender. For this study, the focus is on cisgender individuals, which relates to a person whose sense of personal identity and gender corresponds with their birth sex. Some research in self-disclosure has identified differences between female and male self-disclosure. Also, Phase 1

		• Probe: Do male/female fundraisers share personal information at the same time/stage of the relationship? • Probe: Do male/female fundraisers discuss the same topics with donors (i.e., parenting, life events, personal interests)? • Probe: Do male/female fundraisers discuss topics that are more personal? • Probe: Does the gender makeup of the fundraiser/donor dyad matter (i.e., female fundraiser/male donor vs male fundraiser/male donor)? If so, how? • Probe: Is it more impactful to a donor if a male vs female fundraiser shares personal information with them?	found one significant difference between female and male fundraisers, so the topic of gender is explored in this question. The hope is that this question will help tie the two studies together or provide more detail into why the results were found in Phase 1.
1 & 2	7	Why do you think fundraisers share personal stories like the ones we've discussed today with donors? • Probe: Do you perceive that most fundraisers share these types of stories? Why? • Probe: Why have you decided to share personal information with some donors and not others?	This question will help explore whether and how fundraisers use self-disclosure as a tactic to develop relationships with donors. The probes will investigate why a fundraiser might choose to disclose to one donor vs another. The first probe explores whether self-disclosure is perceived as a common occurrence or strategy within and among fundraisers, and the second probe explores certain characteristics of the relationship that may be identifiable. This may be helpful for fundraising managers and leaders to understand, especially when they are assigning certain

174

1 & 2				
			fundraisers to work with certain donors, hiring, or coaching their fundraising staff members.
1 & 2	8	Thinking back to a time when you shared a personal story or personal information with a donor, how did that impact your relationship after the fact? • Probe: How did it affect your ability to cultivate or solicit the donor? • Probe: Was there any blurring of boundaries or any confusion as a result of you having shared personal information? If so, how did you handle that?	This final set of questions is focused on the consequences or impact of the disclosure after it occurred. These questions seek to explore how or whether the disclosure affected the relationship. These questions tie back to fundraising research (Shaker & Nelson, 2021) which discusses fundraisers and donors having to navigate complex situations in which they have to designate whether they are wearing their "business hat" or "personal hat". Other research (Haytko, 2004) shows that business relationships are better able to sustain conflict when the participants disclose to each other. Participants will explore how they feel after sharing personal information to a person they work with in a professional capacity and their lived experience in dealing with that.
1 & 2	9	Thinking about the time after you shared personal information or a personal story with a donor, was there a change in what the donor shared with you, after you shared information with them? • Probe: Did you perceive that the donor felt differently about you or your relationship after you shared personal information? • Probe: Did you perceive that the donor felt differently about the university or its mission after you shared personal information?	Again, this question ties back to social penetration theory (Altman & Taylor, 1973) and self-disclosure research which investigates the cyclical nature of self-disclosure. Typically, when one person discloses the other person feels obligated to reciprocate and often matches the depth of the information that was shared originally. Understanding this could help fundraisers develop strategies to learn more information about the donors with whom they work (if they are comfortable sharing their personal information with others, of course). The probes tie closely to the concept of relationship fundraising and explore self-disclosure's potential role in strengthening relationships between the fundraiser and

			donor. They also intersect with some of the research interests explored in Phase 1 (i.e., does the fundraiser's self-disclosure change the way the donor feels about the organisation the fundraiser represents).

3.4.7 Phase 2: Participants

Sampling

A nonprobabilistic, purposive sample of fundraisers was chosen for the current research using the chain-referral method (Bagheri & Saadati, 2015). The researcher, who was a former fundraiser, reached out to her network of peer fundraisers and asked them to refer participants who met the following pre-determined criteria:

- Current, full-time fundraiser who works primarily with major donors (i.e., Major Gift Officer, Director of Development, etc.)

- Working in higher education for at least 3 years

- Managing a portfolio of major donors

- Experience cultivating and soliciting gifts from major donors of $10k+

The sample size was determined based on the concept of saturation, which refers to the point in data collection when no additional issues or insights are identified by participants and data collection becomes repetitive and redundant, signifying that an adequate sample size is reached (Guest et al., 2006). Saturation indicates that the 'diversity, depth and nuances of the issues studied' have been captured and is a sign of content validity (Hennink, 2021, p. 114523). Saturation was achieved in the current research upon completion of 20 interviews when no new themes were observed from the data (Hennink, 2021).

Interviews were conducted over Zoom because participants were located in various states throughout the U.S., and due to concerns related to the COVID-19 pandemic. Zoom was chosen

because of its convenience and because all participants were familiar with the platform and had extensive experience using it in the past. The researcher was prepared to move the interviews to phone calls if problems with Zoom arose, however, none did. The interviews were recorded via Zoom, however, the researcher had three back-up recording devices on hand in case the recorded feature malfunctioned.

3.4.8 Phase 2: Procedures

3.4.8.1 Prior to data collection

Prior to data collection, the researcher sent an email to peer fundraisers (current and former) from her network requesting referrals to major gift fundraisers who met the inclusion criteria and might be interested in participating in a semi-structured interview or could refer others who might be. Outreach from the researcher included an introduction to the survey, criteria for participants and an email address for participants to contact the researcher to schedule a time to meet. A research information sheet was also included as an attachment to the email. An example recruitment email and a copy of the study information sheet is included in Appendix 2. After scheduling the interviews, participants filled out a brief survey collecting demographic information and indicating their consent for participating in the interview, which is also included in Appendix 2.

Semi-structured interviews were conducted via Zoom. Interviews were recorded and saved on a securely encrypted jump drive and in a password-protected Dropbox account to ensure data protection and confidentiality. Interviews were transcribed using the automatic Zoom

transcription tool, however, they required additional attention and editing from the researcher to ensure participant's remarks were properly recorded.

As recommended by Kallio et al., (2016), the interview protocol was piloted with two participants, a male and a female, who met the participant criteria except for the experience in higher education criteria. One participant was a major gift officer at a food bank and had never worked in higher education. The other had previous higher education experience but was working for a private K-12 school at the time the interview was conducted. However, the purpose of the Phase 2 interviews was to understand how fundraisers utilise self-disclosure in their interactions with major donors, so for the purpose of piloting the interviews the researcher determined that their lack of experience in higher education was not a concern. As a result of the pilot interviews, the following lessons were learned:

- Some questions from the initial interview protocol were repetitive and needed to be rephased and/or eliminated

- Having a backup recording device or plan in case of technical problems was critical

- Communicating an alternate option for conducting the interview (i.e., via phone if Zoom was not working) was critical

- Having an example of a time the participant had self-disclosed to a donor was helpful to refer back to throughout the remainder of the questions

- Piloting the interviews helped familiarise the researcher with the protocol questions, resulting in being more prepared and comfortable during subsequent interviews with participants

The researcher began the interviews by thanking participants for taking part. Questions from the interview protocol were asked of all participants, however, there was some flexibility, for example, if participants addressed the answer to one question during their response to a different question, the researcher would adjust questioning accordingly. The researcher took notes about points or topics that required additional clarification or inquiry and waited until participants completed their responses before interjecting with requests for additional information.

3.4.8.2 After data collection

A thematic analysis of the interview data began after all interviews were conducted. Thematic analysis is widely used in qualitative data analysis, known for its flexibility and compatibility with the constructivist paradigm (Braun & Clarke, 2006), which is utilised in the current research. Researchers use thematic analysis to search across data sets to identify, analyse and report patterns, or themes, that are revealed (Braun & Clarke, 2006). A theme describes important information about the data that ties back to the research question and represents 'a patterned response or meaning within the data set' (Braun & Clarke, 2006, p.82). The current research follows the steps identified by Braun and Clarke's (2006) for conducting a thematic analysis. These steps are described in Table 3.13. A discussion of how these steps were followed in the current research is included in Chapter 4.

Table 3.13: Phases of thematic analysis

Phase	Description of the process
1 - Familiarizing yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas
2 - Generating initial codes	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code
3 - Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme
4 - Reviewing themes	Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis
5 - Defining and naming themes	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme
6 - Producing the report	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis

Source: Braun & Clarke (2006)

3.5 Summary

This chapter contains a detailed review of the aims and objectives, philosophy and approach and methods employed in the current research. The research philosophy was informed by Creswell and Plano Clark (2018), who argue that it is possible for researchers to shift their philosophical assumptions during a research study. Thus, the quantitative first phase was guided by the postpositivist paradigm approach and the qualitative second phase was guided by the constructivist paradigm.

Mixed methods research requires the adoption of a specific approach to investigate research questions. In the current study, a sequential explanatory mixed method approach was used to investigate the role of a fundraiser's self-disclosure during interactions with major donors. The research included two phases. Phase 1 was a cross-sectional survey design and participants were major donors who had made a one-time donation of $10,000 or more to Indiana University, an institution of higher education located in the U.S. Survey results revealed very few statistically significant findings, which was unexpected. Thus, it was determined that a second, qualitative, phase of research was necessary to answer the research question. The researcher determined that the vignettes used in Phase 1 could have misrepresented the ways in which fundraisers use self-disclosure in their interactions with major donors. Thus, the Phase 2 interview protocol focused on the independent and dependent variables from Phase 1 – the fundraisers' self-disclosure and how (whether) it effected donors' giving decisions. It is important to state again that moral identity is not being studied in Phase 2 of the current research project. The reason is that moral identity is a donor-focused variable, however, Phase 2 research focused on the fundraisers and their interactions. Participants for Phase 2 were major gift fundraisers working in higher education at institutions in the U.S. Twenty semi-structured interviews were conducted and the qualitative data was analysed using a six-step process (Braun and Clarke, 2006). Findings from both Phase 1 and Phase 2 are discussed in the following chapter.

182

Chapter 4: Findings

This chapter reports results from Phase 1 and Phase 2 of the current research. Phase 1, which tested several hypotheses using moderated mediation and other statistical analyses, is discussed first. The section begins with a discussion of descriptive statistics including demographic information as well as construct analysis. Next, testing of the hypotheses is presented.

Many results from Phase 1 were non-significant . Several explanations are presented for why this may have occurred, however, the researcher determined that additional information was needed to fully answer the research question. Thus, a qualitative Phase 2 was necessary.

Following recommendations by Creswell and Plano Clark (2018), the researcher utilised the findings from Phase 1 to inform the interview protocol for the second phase of qualitative inquiry. As a reminder, in a sequential explanatory mixed methods approach the results from the qualitative (Phase 2) research are used to further describe and explain the non-significant results from the first quantitative phase.

Results from Phase 2 are presented in the second half of this chapter. The section begins with a discussion of participants and the thematic analysis process. Next, the five themes identified as part of the thematic analysis process are discussed in detail. The section ends with a summary of the results.

4.1 Phase 1: Quantitative

This section begins with a discussion of descriptive statistics including demographic information as well as construct analysis used during Phase 1. Descriptive statistics helped describe the participants who completed the study, as well as provided an overview of the variables, constructs and their related measurement (Black, 1999). Descriptive statistics also helped provide a snapshot of how representative the sample was of the population to be studied (Hawkes & Marsh, 2005). Construct analysis investigated each construct's validity to determine whether it was measuring what it intended to measure (Black, 1999). Next, the hypotheses were tested using various statistical analyses, including simple moderation analysis as well as conditional indirect process analysis, or moderated mediation analysis, using PROCESS, an SPSS programme add-on (Hayes, 2017).

4.1.1 Phase 1: Aims and Objectives

As a reminder, the overarching research aim of this dissertation research was to determine what role fundraisers' self-disclosure plays in fundraiser-major donor interactions.

The research questions for Phase 1 were:

1. Does the content of a fundraiser's self-disclosure predict a donor's giving intention?

    a. Are the results of research question 1 different for male and female fundraisers?

2. Is there a relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents? That is, is there a "ripple effect"?

3. Do variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention?

4.1.2 Phase 1: Descriptive Statistics

The cross-sectional electronic survey was distributed to approximately 3,000 major donors (defined as individuals who had given a one-time gift of $10,000 or more) to the Indiana University Foundation. The survey link was distributed electronically by Foundation officials who provided an estimate, rather than an exact number, of individuals who were invited to participate. A total of 509 participants began the survey, however, only 290 complete responses were obtained and thus are the only responses included in the analysis in this chapter.

Age

Participants' ages ranged between 19 – 99 years. As Table 4.1 shows, only three respondents were age 40 or under (one was 19, one was 38, one was 40), and the mean age was 70. Compared to the 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households (Osili et al., 2021), which is based on a nationally representative random sample of 1,626 wealthy U.S. households with a net worth of $1 million or more (excluding the value of their primary home) and/or an annual household income of $200,000, participants ages are representative of the U.S. major donor population, who tend to be older and donate more after age 40.

Table 4.1: Phase 1 – Participant demographics: age

Age group	Frequency	Percentage
40 and under	3	1%
41-50	8	3%
51-60	44	15%
61-70	86	30%
71-80	98	34%
81-90	48	17%
90 and above	3	1%

Gender

For gender, a dummy variable was computed whereby a 1 was assigned to all participants who identified as female and a 0 was assigned to all participants who identified as male. Three participants chose Other/Prefer Not to Say. As shown in Table 4.2, most participants in this study identified as male (n = 200) versus female (n = 87). This aligns with other research that shows that more individuals who identify as men give than women, especially major gifts (Dittmar, 2014).

Table 4.2: Participant demographics - gender

Gender	Frequency	Percentage
Male	200	69%
Female	87	30%
Other/Prefer Not to Say	3	1%

Race/Ethnicity

Most participants in this study, 96%, were Caucasian. Other studies have found that a majority of major donors were Caucasian. For example, in the 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households report (Osili et al., 2021), 60% of respondents were White/Caucasian, compared with 12.4% African American/Black, 13.5% Asian American, and 12.6% Hispanic. For the current study, the lack of diversity among respondents may be considered a limitation.

Table 4.3: Participant demographics – Race/ethnicity

Race/ethnicity	Frequency	Percentage
Caucasian	281	96%
African American	2	1%
Asian/Pacific Islander	2	1%
Hispanic	2	1%
Other	3	1%

Education

As shown in Table 4.4, demographics show that participants in the current research were highly educated, with nearly half of all participants indicating they had achieved the highest educational attainment level included in the measurement – PhD, MD, or JD (47%). All other categories included at least one response, with the second highest being a Master's degree (30%). Only a handful (2%) indicated they did not attend college. These rates are higher than a nationally

representative sample in which 38.8% of respondents had a Master's degree or higher (Osili et al., 2021).

Table 4.4: Participant demographics – Education level

Education level	Frequency	Percentage
PhD, MD or JD	136	47%
Master's degree	88	30%
College degree	60	20%
High School diploma	6	3%

Employment status

Most participants (63%) indicated they were not currently working, which makes sense considering that many of them were over the age of 65. However, as Table 4.5 shows, 26% of participants were still working full-time and about 11% were working part-time. The most recent study the researcher could find that reported on major donor employment status showed similar findings with 59.9% found to be retired (Rooney & Frederick, 2007), thus, participants were representative of U.S. major donors more broadly.

Table 4.5: Participant demographics – Employment status

Employment status	Frequency	Percentage
Not working	182	63%
Full-time	74	26%
Part-time	34	11%

4.1.3 Phase 1: Construct Analysis

Descriptions of the variables included in this study, as well as how they were coded and summary data including measures of central tendency and measures of spread are introduced in Table 4.6 and described further in the section that follows. Cronbach's alpha is used as an indicator of the internal consistency of the instruments used in the survey (Black, 1999). A Cronbach alpha value of 0.7 or higher is an indicator of acceptable internal consistency (Black, 1999). As noted in Chapter 3, the moderated mediation analysis used in this research project does not require normal distribution of data (Hayes, 2017), thus issues related to skewedness and kurtosis are not discussed.

Table 4.6: List of variables and descriptions

Variable	Variable Type	Description
Independent Variables		
Disclosure Type	Categorical	Participants were scored a 1 for having received the self-related disclosure condition and a 0 for having received the other-related disclosure condition
Fundraiser Gender	Categorical	Participants were scored a 1 for having received the condition with a male fundraiser and a 0 for the condition with a female fundraiser.
Mediators		
1 – Communal Strength/ Fundraiser	Ordinal	7-point Likert scale; 4 items. Scale measures were summed and combined into a single score.
2 – Communal Strength/ Organisation	Ordinal	7-point Likert scale; 4 items. Scale measures were summed and combined into a single score.
3 – Connection/ Fundraiser	Ordinal	7-point Likert scale; 3 items. Scale measures were summed and combined into a single score.
4 – Connection/Organisation	Ordinal	7-point Likert scale; 3 items. Scale measures were summed and combined into a single score.
5 – Commitment/Fundraiser	Ordinal	7-point Likert scale; 3 items. Scale measures were summed and combined into a single score.

6 – Commitment/Organisation	Ordinal	7-point Likert scale; 3 items. Scale measures were summed and combined into a single score.
Moderator		
Moral Identity	Ordinal	7-point Likert scale; 3 items. Scale measures were summed and combined into a single score.
Dependent variable		
Giving Intention	Interval	Scored on a sliding scale. Participants indicated a giving amount between $0 - $10,000.

Communal Strength – Fundraiser

Participants' feelings of communal strength toward the fundraiser ranged from 3.79 – 4.8 on the 7-point Likert scale, as seen in Table 4.7. Participants' feelings of communal strength are slightly higher for Juliana than Lawrence on all measures except the 'being willing to give up a lot to benefit' measure. The Cronbach alpha for this scale was .88 (Lawrence) .85 (Juliana), which is an indicator of good internal consistency.

Table 4.7: Construct analysis – Communal strength toward the fundraiser

Measure	Mean	Std Deviation	N
I would go out of my way to do something for Lawrence.	4.50	1.51	143
I would go out of my way to do something for Juliana.	4.80	1.46	147
I would incur a large cost to meet the needs of Lawrence.	3.80	1.62	143
I would incur a large cost to meet the needs of Juliana.	3.85	1.49	147
Meeting Lawrence's needs is a high priority for me.	4.03	1.50	143
Meeting Juliana's needs is a high priority for me.	4.17	1.43	147
I would be willing to give up a lot to benefit Lawrence.	3.93	1.54	143
I would be willing to give up a lot to benefit Juliana.	3.79	1.51	147

Communal Strength – Organisation

As a reminder, the hypothetical university featured in the vignettes was Carrolton University. As seen in Table 4.8, participants reported higher feelings of communal strength toward Carrolton University than toward the fundraiser. (All participants received this measure regardless of whether they were assigned a male or female fundraiser treatment, so the N = 290.) The Cronbach alpha for this scale was .82, which is an indicator of good internal consistency.

Table 4.8: Construct analysis: Communal strength toward the organisation

Measure	Mean	Std Deviation
I would go out of my way to do something for Carrolton University.	5.14	1.34
I would incur a large cost to meet the needs of Carrolton University.	4.35	1.62
Meeting Carrolton University's needs is a high priority for me.	5.13	1.34
I would be willing to give up a lot to benefit Carrolton University.	4.51	1.56
N = 290		

Connection – Fundraiser

As seen in Table 4.9, feelings of connection to the fundraiser ranged between 4.43 – 5.06. Once again, the mean scores for Juliana were slightly higher than for Lawrence, except for the 'attached' measure. The Cronbach alpha for this scale was .86 (Lawrence) and .83 (Juliana), an indicator of good internal consistency.

191

Table 4.9: Construct analysis – Connection to the fundraiser

Measure	Mean	Std Deviation	N
I feel bonded with Lawrence.	4.66	1.40	143
I feel bonded with Juliana.	4.79	1.40	147
I feel I'm attached to Lawrence.	4.44	1.49	143
I feel I'm attached to Juliana.	4.43	1.49	147
I feel I'm connected to Lawrence.	4.89	1.35	143
I feel I'm connected to Juliana.	5.06	1.35	147

Connection – Organisation

Once again, participants report higher levels of connection to Carrolton University than their fundraiser, as indicated in Table 4.10, with averages ranging between 5.37 – 5.48. Good internal consistency is indicated for this scale with a Cronbach alpha of .87.

Table 4.10: Construct analysis – Connection to the organisation

Measure	Mean	Std Deviation
I feel bonded with Carrolton University.	5.37	1.20
I feel I'm attached to Carrolton University.	5.39	1.15
I feel I'm connected to Carrolton University.	5.48	1.12
N = 290		

Commitment – Fundraiser

Participants' feelings of commitment to the fundraiser were measured and ranged between 4.03-4.61, as seen in Table 4.11. Interestingly, participants reported lower feelings of commitment toward Juliana than Lawrence, in contrast to their feelings of communal strength and connection. This scale also achieved good internal consistency with Cronbach alpha scores of .89 (Lawrence) and .92 (Juliana).

Table 4.11: Construct analysis – Commitment to the fundraiser

Measure	Mean	Std Deviation	N
I am committed to maintaining my relationship with Lawrence.	4.61	1.46	143
I am committed to maintaining my relationship with Juliana.	4.28	1.57	147
I am oriented toward the long-term future of my relationship with Lawrence.	4.39	1.38	143
I am oriented toward the long-term future of my relationship with Juliana.	4.03	1.56	147
My relationship with Lawrence is something I am very committed to.	4.42	1.52	143
My relationship with Juliana is something I am very committed to.	4.04	1.52	147

Commitment – Organisation

As seen in Table 4.12, participants reported higher feelings of connection to Carrolton University than their fundraisers, ranging from 5.46-5.55. The Cronbach alpha for this scale was .90, indicating very good internal consistency.

Table 4.12: Construct analysis – Commitment to the organisation

Measure	Mean	Std Deviation
I am committed to maintaining my relationship with Carrolton University.	5.55	1.08
I am oriented toward the long-term future of my relationship with Carrolton University.	5.46	1.14
My relationship with Carrolton University is something I am very committed to.	5.51	1.14
N = 290		

Moral Identity

For the measure of moral identity, participants were presented with a list of characteristics that may define a person: kind, caring, compassionate, fair, friendly, generous, hardworking, helpful, and honest (Aquino & Reed, 2002). Keeping in mind these characteristics, participants were asked the questions listed in Table 4.13. On average, participants reported high levels of feelings of the self-importance of moral identity (participants' average scores ranged between 6.02 – 6.13 on a 7-point Likert scale). This finding was important during hypothesis testing and indicated that participants had higher levels of moral identity than other studies. For example, Aquino and Reed (2002) find that average scores of their participants' is 4.49 (males) and 4.45 (females). However, this difference could be attributed to the fact that all participants in the current research were major donors (rather than members of the general public, as in in Aquino and Reed (2002) study), who may be more likely to show concern for and be willing to help others, and all participants in the current research were donors supporting at least one nonprofit organisation. It is also important to note that most participants in the study report high levels of moral identity (again, between 6.02 – 6.13 on a 7-point Likert scale). That is, there is not a lot of variation in the participants' responses, and the variance between 6.02 and 6.13 is not statistically significant. A very good indicator of internal consistency was reported for this measure, with a Cronbach alpha score of .91.

Table 4.13: Construct analysis – Moral identity

Measure	Mean	Std Deviation
It would make me feel good to be a person with these characteristics.	6.13	1.33
Being a person who has these characteristics is an important part of who I am.	6.02	1.36
I strongly desire to have these characteristics.	6.06	1.31
N = 290		

4.1.4 Phase 1: Manipulation checks

Prior to hypothesis testing, manipulation checks were conducted to ensure participants perceived the independent variables accurately (Greenberg et al., 1996). The independent variables are disclosure content (self-related, mission-related and high-depth) and the fundraiser's gender, as measured by whether participants were assigned either Lawrence or Juliana. See Tables 3.5 and 3.6 for definitions and examples of these variables. For the current research, the manipulation check would be considered successful if, for example, participants who received the self-related disclosure content indicated that the information was personal, rather than related to education, meaningful or revealing of his/her emotions. After participants received the experimental treatment, they were asked to respond on a 7-point Likert scale (1 = Strongly disagree, 7 = Strongly agree) to a series of randomised statements:

1. The information Lawrence/Juliana shared is personal.

2. The information Lawrence/Juliana shared is related to education.

3. The information Lawrence/Juliana shared is revealing of his/her emotions.

The first manipulation check was run on the participants who received the self-related disclosure content. An independent samples t-test was run to determine whether participants who received the self-related treatments perceived the disclosure in the treatment accurately. Results were significant; participants who received the self-related disclosure treatments ($M = 6.07$, $SD = 1.04$) rated the *personal* statement significantly higher than the participants who received the other-related disclosure treatment ($M = 5.15$; $SD = 1.42$), $t(287) = 6.32$, $p = 0.00$.

The second manipulation check was run on the participants who received the mission-related disclosure treatments. An independent samples t-test was run to determine whether participants who received the mission-related treatments perceived the disclosure in the treatment appropriately. Results were not significant; participants who received the mission-related disclosure treatments ($M = 5.28$ $SD = 1.37$) did not rate the *education* statement significantly higher than the participants who received the mission unrelated disclosure treatment ($M = 5.47$; $SD = 1.32$), $t(288) = -1.176$ $p = 0.24$. This is an indicator that participants did not perceive the mission-related disclosure as being about education, the mission of an institution of higher education, and thus is not an adequate construct to investigate (Greenberg et al., 1996). Next, the researcher conducted an examination of a boxplot to detect outliers, however, none were detected. Thus, the mission-related content variable was removed from future analysis.

The third manipulation check was run on the participants who received the high-depth disclosure content. Emotion was used as an indicator of depth for this measurement because high-depth disclosure includes information that reveals feelings and emotions (Altman & Taylor, 1973). An independent samples t-test was run to determine whether participants who received the high

196

depth treatments perceived the disclosure in the treatment appropriately. Results were not

significant; participants who received the high-depth disclosure treatments (M = 5.63, SD =

1.13) did not rate the *emotional* statement significantly higher than the participants who received

the low depth disclosure treatment (M = 5.54; SD = 1.04), t (288) = .546, p = 0.58. Again, this

indicates that the high-depth disclosure content was not perceived accurately by participants and

may not be a useful variable for testing the hypotheses (Greenberg et al., 1996). Again, the

researcher conducted an examination of a boxplot to detect outliers, however, none were

detected. Thus, the high emotion variable was removed from future analysis.

4.1.5 Phase 1: Hypothesis Testing

The complete research model is depicted in Figure 4.1. The hypotheses required moderated

mediation analysis to determine whether moral identity (W) moderated the relationship between

a fundraiser's disclosure type (X1) and a participant's giving intention (Y) through the following

mediating variables: feelings of communal strength with a fundraiser; (M1) feelings of

communal strength with the organisation (M2); feelings of connection to the fundraiser (M3);

feelings of connection to the organisation (M4); feelings of commitment to the fundraiser (M5);

and feelings of commitment to the organisation (M6). The study also examined whether moral

identity (W) moderated the relationship between the fundraiser's gender (X2) and a participant's

giving intention (Y) through the following mediating variables: feelings of communal strength

with a fundraiser; (M1) feelings of communal strength with the organisation (M2); feelings of

connection to the fundraiser (M3); feelings of connection to the organisation (M4); feelings of

commitment to the fundraiser (M5); and feelings of commitment to the organisation (M6). The

researcher used PROCESS, an SPSS add on, to conduct conditional process analyses, discussed

in the following section.

As a reminder, the complete research model is presented in Figure 4.1. However, analysis was

broken down based on the hypotheses for clarity and ease of understanding.

Figure 4.1: Complete research model
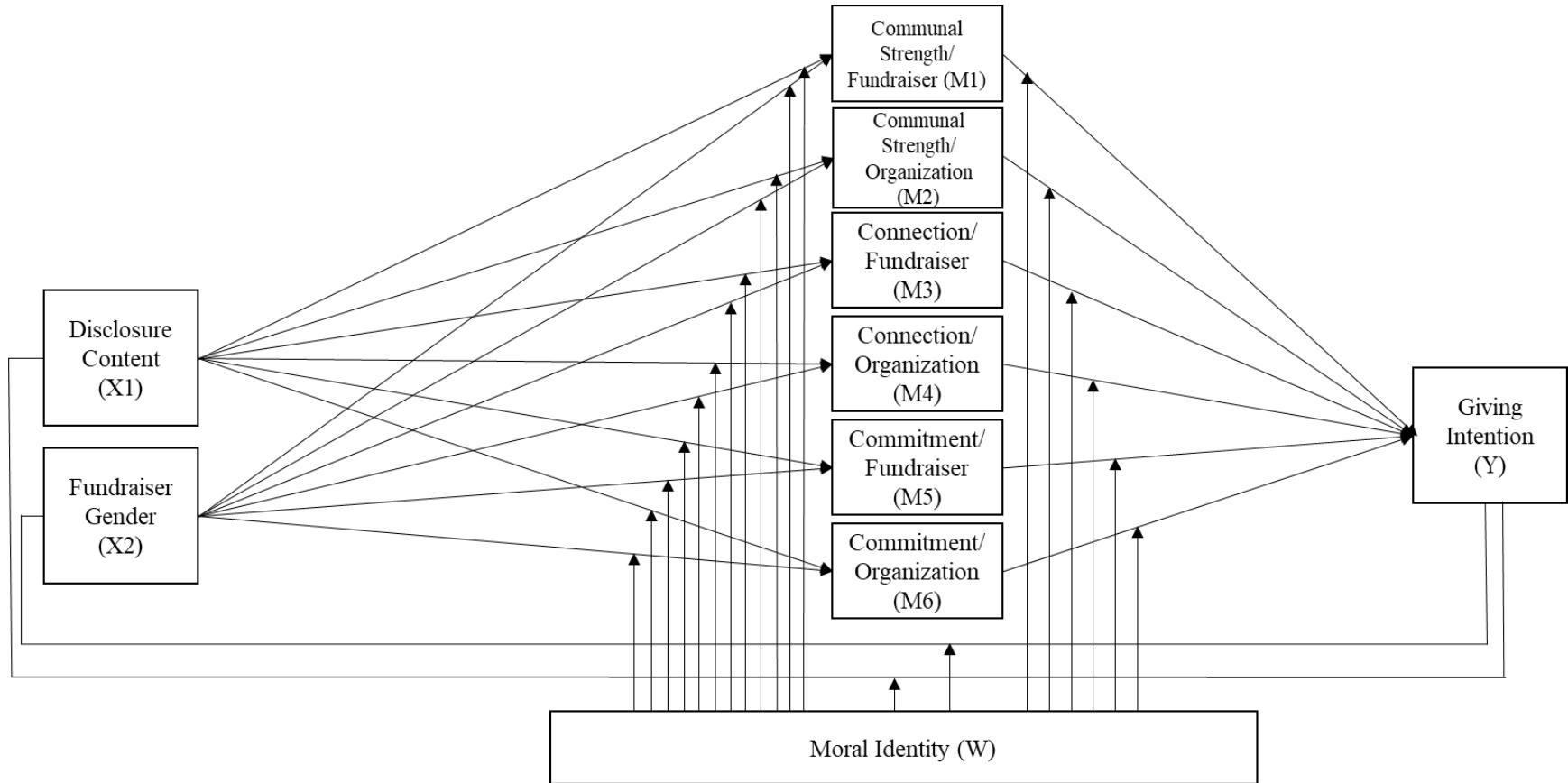
Discussion of each hypothesis is structured similarly to make the information easier for the reader to understand.

Hypothesis 1

H1: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be moderated by a donor's moral identity.

Figure 4.2: Model for hypothesis 1
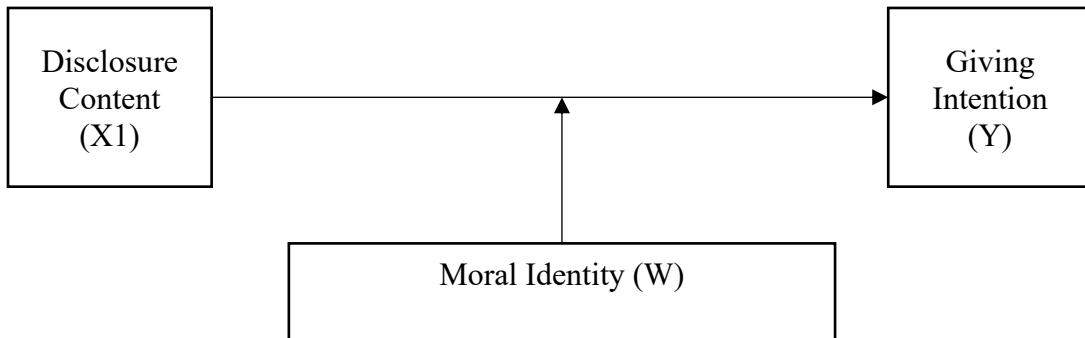
The objective of hypothesis 1 was to explore whether moral identity moderates the relationship between the fundraiser's disclosure type and the participant's giving intention. To test this hypothesis a moderation analysis (PROCESS model 1) was run. A moderated effect would mean that donors' moral identity strengthens the effect of the fundraisers' disclosure on a donor's giving intention. Evidence of moderation would be indicated by a statistically significant two-way interaction, in this case, between disclosure type together with moral identity on giving intention. However, the results were not statistically significant ($b = -.05$, $t(281) = -.44$, $p = .66$).

Thus, hypothesis 1 is not supported.

Hypothesis 2

H2: The relationship between a fundraiser's gender and a donor's giving intention will be moderated by a donor's moral identity.

Figure 4.3: Model for hypothesis 2
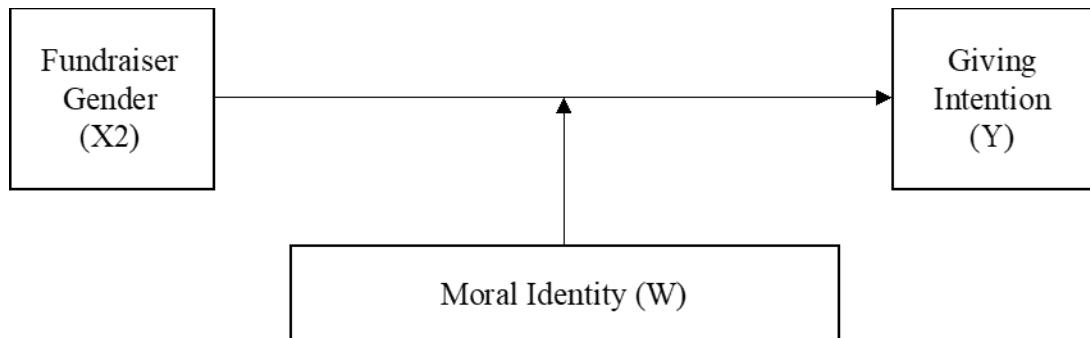
Similar to hypothesis 1, this hypothesis explored whether moral identity moderated the relationship between a fundraiser's gender and a donor's giving intention. PROCESS model 1 was used to conduct a simple moderation analysis, however, once again no significant results were found. The two-way interaction between fundraiser gender and moral identity on giving was not statistically significant ($b = -.04$, $t(281) = -.40$, $p = .69$). Thus, hypothesis 2 is not supported.

In discussing the fundraiser's gender as an independent variable, it is important to note here again that the analysis run during hypothesis also took into account the gender of the participant. However, the testing controlled for participant's gender and found no statistically significant differences between responses.

Definition of key terms

Before describing the hypothesis testing further, it is helpful to define several key terms that are used in moderated mediation analysis. A description of each term and how it is utilised in the current research is provided in Table 4.14.

Table 4.14: Statistical terms related to moderated mediation analysis

Term	Description	Use in current research
Confidence interval	Confidence intervals are indicators of the quality of an estimate; the smaller the confidence interval for a particular estimate, the more caution is required when using the estimate.	Confidence intervals are most often set at 95%, thus it was chosen as adequate for the current research.
Bootstrap sampling confidence intervals	Bootstrap sampling is a commonly used resampling method that treats the original sample as a miniature representation of the entire population of interest. Observations are then "resampled", and analyses are conducted based on the new sample achieved through the resampling process (p. 98).	Bootstrap sampling confidence intervals are most often set at 5,000, thus it was chosen as adequate for the current research.
Conditional values for moderator	The effect of a moderator on variables of interest can be investigated at different values or levels (low, average, and high) of the moderator. For the current research, the effect of a donor's moral identity will be tested for donors with low, average and high	Conditional values for moderators are most often set at the 16th (low), 50th (average) and 84th (high) percentiles of the value of the moderator. Thus, these values

	moral identity, providing a more detailed explanation about the effect of the moderator.	were chosen for the current research.

Source: Hayes (2018)

Discussion of the conditional values for the moderator

As noted in Table 4.14, conditional values for the moderator were set at the 16th (low), 50th (average) and 84th (high) percentiles for the current research. However, it should be noted that scores for moral identity did not vary significantly among participants. Percentiles were calculated based on a combined average score for the three moral identity questions. Participants in the 16th percentile had an average moral identity score of 4.5 on a 7-point Likert scale. The 50th percentile had an average moral identity score of 6.2 and the 84th percentiles had an average moral identity score of 7. Thus, the discussion of low moral identity is relative to the overall data set. The term "lower" moral identity is used throughout for clarity to emphasise this point. Table 4.15 provides additional information about participants' moral identity responses.

Table 4.15 Additional detail regarding the values for the moderator

Percentile	Average Moral Identity score for each percentile	Description	Moral identity score	# of participants
16th percentile (low moral identity)	4.5 on a 7-point Likert scale	The low percentile is comprised of 55 participants, or 19% of the sample	Score = 1	7
			Score = 1.67	1
			Score = 2.67	2
			Score = 3.67	1
			Score = 4	2
			Score = 4.67	7

			Score = 5	8
			Score = 5.33	7
			Score = 5.67	20
50th percentile (average moral identity)	6.2 on a 7-point Likert scale	The average percentile is comprised of 91 participants, or 31% of the sample	Score = 6	43
			Score = 6.33	30
			Score = 6.67	18
84th percentile (high moral identity)	7 on a 7-point Likert scale	144 participants, or 50% of the sample, had a moral identity score of 7	Score = 7	144

Next, the remaining hypotheses are discussed. The full results of the analysis for hypothesis 3 are described, however, only the statistically significant results for hypotheses 4 – 8 are included. The nonsignificant results for hypotheses 4 – 8 are included in Appendix 3.

Hypothesis 3

H3: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and may be moderated by the participant's moral identity.

Figure 4.4: Model for hypothesis 3
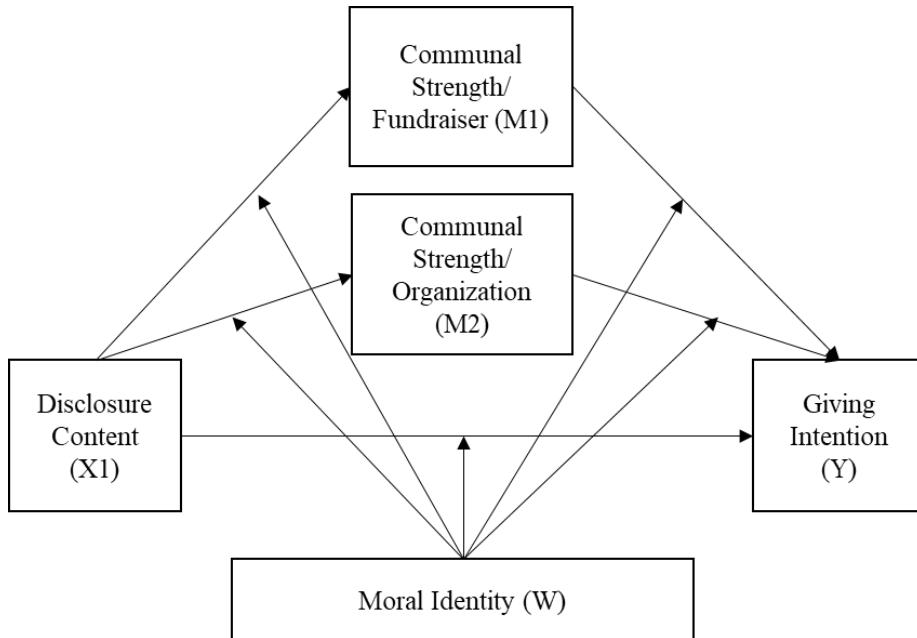
The next series of hypotheses (hypotheses 3 – 8) required a statistical analysis that computes

both moderation and mediation effects. Thus, they require a different model to be run in

PROCESS (model 59). The purpose of hypothesis 3 was to investigate whether the fundraiser's

disclosure could be explained (or mediated) by a donor's feelings of communal strength, both

toward the fundraiser and the organisation, as well as whether moral identity moderated any of

the relationships tested.

This type of statistical analysis investigates multiple relationships or paths depicted in Figure 4.4.

The first relationships discussed are between the independent variable and the mediators, as well

as the moderator's effect on the independent variable. A model that depicts these relationships is

provided in Figure 4.5.

Figure 4.5: Model depicting the relationship between the independent variable and the mediators
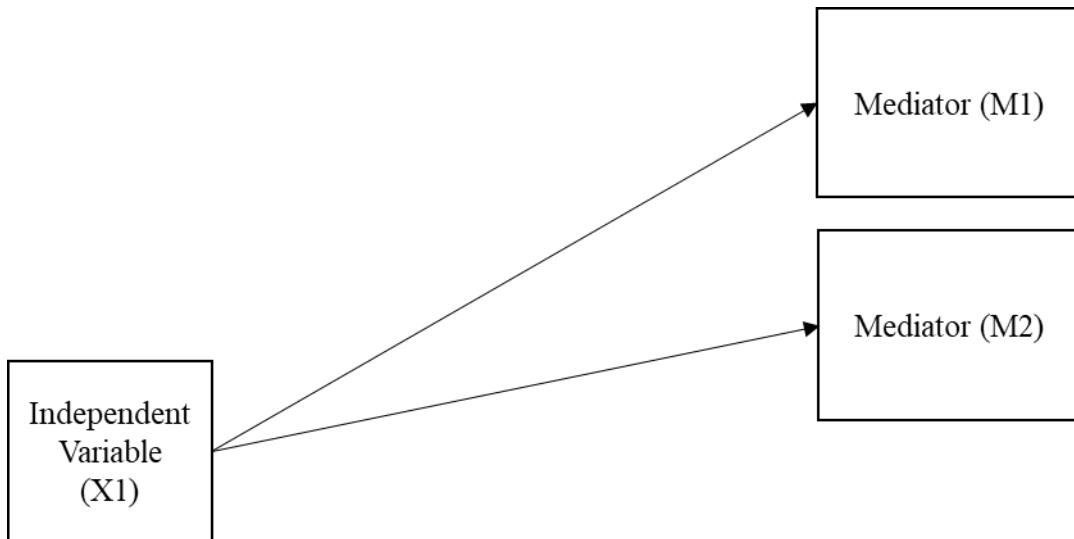
One of the objectives of the Phase 1 research was to investigate whether there is a "ripple effect" of the fundraiser's disclosure on the donor's feelings about the organization the fundraiser represents. Evidence of a ripple effect would be indicated if the relationship between self-disclosure content and the donor's feelings of communal strength toward the organization was $p < .05$. The results of the analysis in the model are presented in Figure 4.6. None of the results were significant.

Figure 4.6: Model depicting results of the effect of self-disclosure on the donor's feelings of communal strength toward the fundraiser and the organization
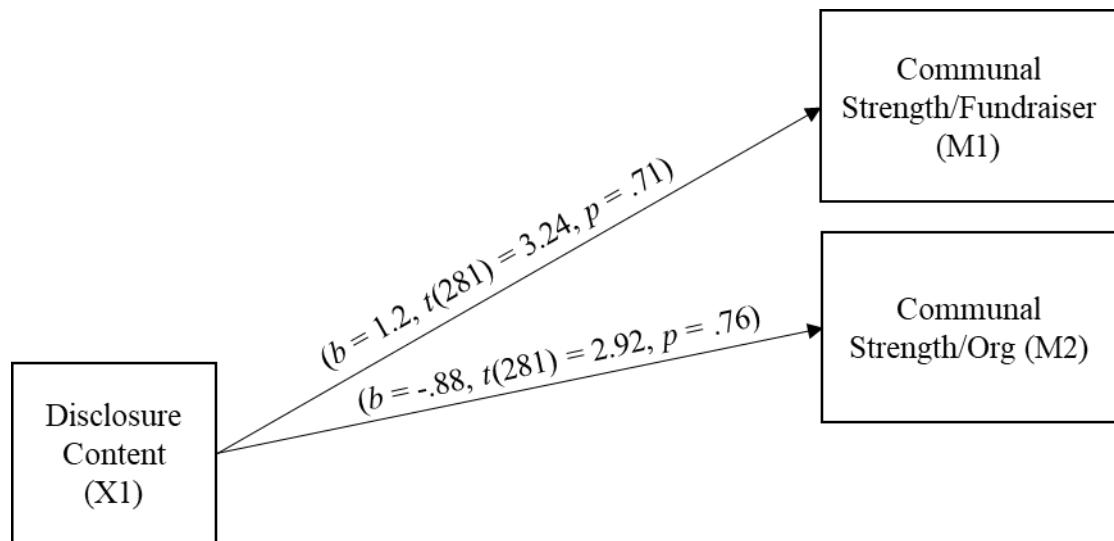
These results were surprising and indicate that there is no evidence of a ripple effect. That is, when a fundraiser self-discloses, their self-disclosure does not appear to affect the way a donor feels about the organization the fundraiser represents.

Next, the analysis reports the direct effect of the independent variable, mediators, and the moderator on the dependent variable. A model that depicts these relationships is provided in Figure 4.7.

Figure 4.7: Model depicting the direct effects of different variables on the dependent variable
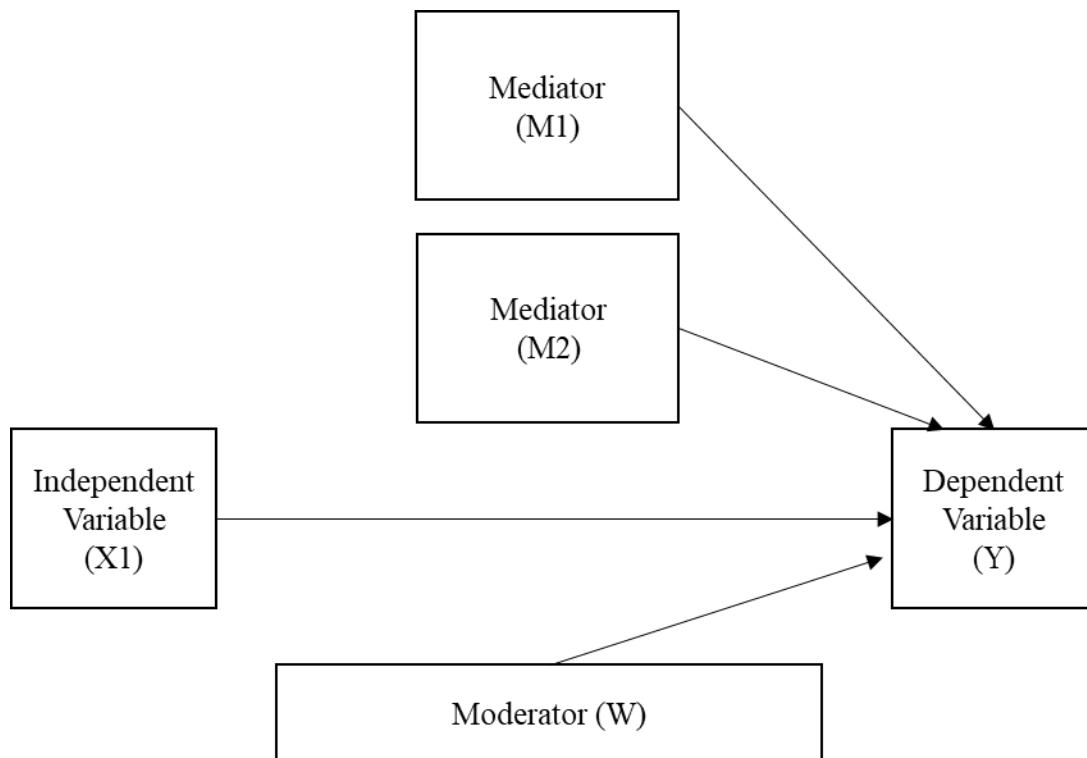
The results of the analysis are reported and depicted on the model in Figure 4.8. None of the results for hypothesis 3 were significant.

Figure 4.8: Model depicting results of the direct effects on the dependent variable
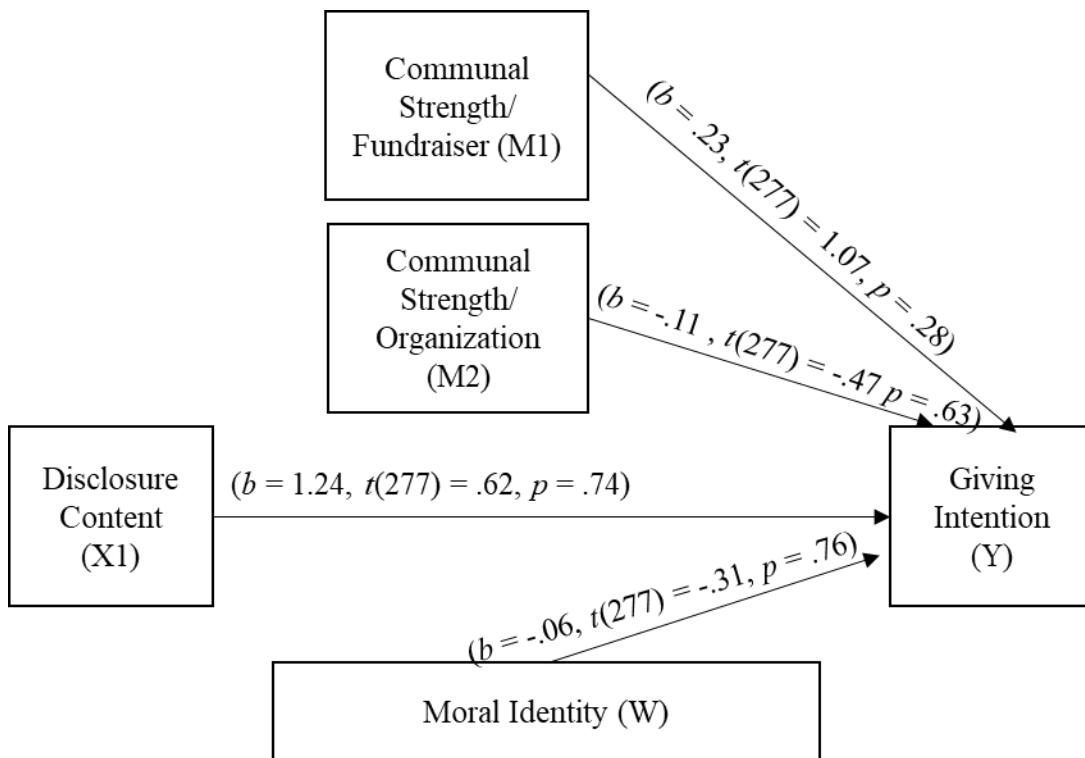
Results from this model indicate that neither disclosure content, communal strength toward the fundraiser, communal strength toward the organization, or a donor's moral identity is driving a donor's giving intention.

The statistical analysis also investigates two-way interactions. That is, it investigates the effect of two variables together on another variable. A model which visually depicted in these relationships is presented in Figure 4.9.

Figure 4.9: Model depicting two-way interactions on the dependent variable
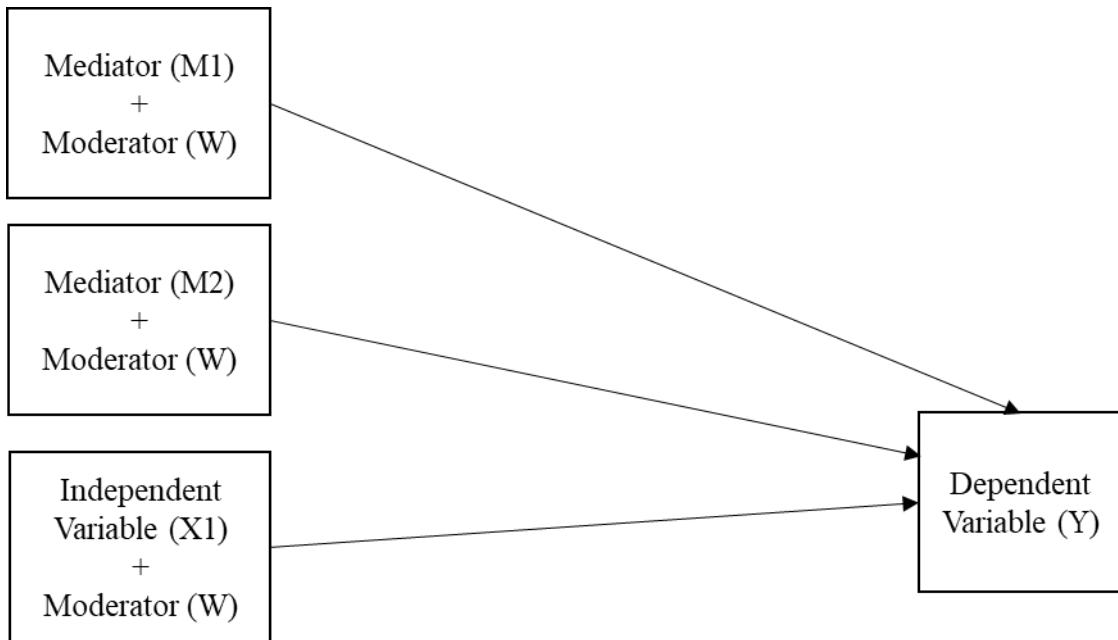
Next, the results for hypothesis 3 are reported, and depicted on the model in Figure 4.10. None of

the relationships investigated in the analysis for hypothesis 3 were significant.

Figure 4.10: Model depicting results of the two-way effects on the dependent variable
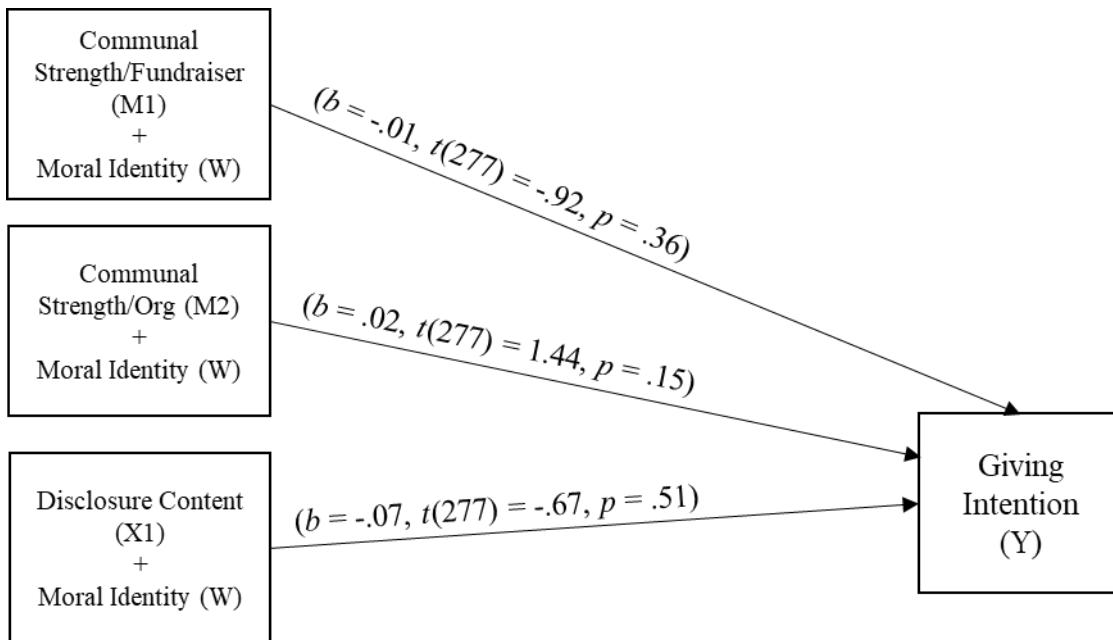
The results of this part of the analysis indicate that donor's moral identity, when combined with other variables, is not impacting donors' giving intention.

Next, conditional direct and indirect effects are reported. Unfortunately, these relationships are too complex to be depicted visually. Conditional direct effects examine the relationships between two variables at different levels, or conditions, of the moderating variable. It may be helpful to think of conditional direct effects as the relationship between X → Y at low, average, and high levels of W.

In the current study, the relationship between disclosure content and giving intention is investigated among donors who report low, average, and high levels of moral identity. Evidence of conditional direct effects is typically indicated when $p < .05$. Results of the conditional direct effects for hypothesis 3 are reported in Table 4.16.

Table 4.16: Results for the conditional direct effect of disclosure content on giving intention at different levels of moral identity

Moderator Group	b	t	p	LLCI, ULCI
Low moral identity	.1612	.3094	.7573	-.8646, 1.1870
Average moral identity	-.1634	-.4037	.6868	-.9600, .6333
High moral identity	-.2716	-.5627	.5741	-1.2217, .6786

As no significant direct effects were discovered, conditional indirect effects are discussed next. Conditional indirect effects investigate the independent variable through the mediating variable on the dependent variable at various levels of the moderating variable. It may be helpful to think of conditional indirect effects as the relationship between X → M →Y at low, average, and high levels of W.

Hypothesis 3 investigated the effect of disclosure content, through communal strength (toward the fundraiser and the organization) on giving intention among donors who report low, average, and high levels of moral identity. Evidence of conditional indirect effects are indicated when the lower level confidence interval (LLCI) and upper level confidence interval (ULCI) do not contain zero. So, if the LLCI and the ULCI are both negative or if they are both positive, that indicates evidence of conditional indirect effects. Results investigating the conditional indirect effect of communal strength toward the fundraiser are provided in Table 4.17 and results

indicating the conditional indirect effect of communal strength toward the organization are

provided in Table 4.18. Neither result is significant.

Table 4.17: Results for the conditional indirect effect of disclosure type on giving intention through feelings of communal strength toward the fundraiser at different levels of moral identity.

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	.0305	.0987	-.1436, .2654
Average moral identity	.0048	.0332	-.0562, .0892
High moral identity	.0011	.0423	-.0877, .1006

Table 4.18: Results for the conditional indirect effect of disclosure type on giving intention through feelings of communal strength toward the organisation at different levels of moral identity.

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	.0303	.1514	-.2886, .3498
Average moral identity	.1227	.1424	-.1497, .4217
High moral identity	.1650	.1969	-.2007, .5789

Taken together, these results were surprising and none of the relationships investigated in

hypothesis 3 were significant. Thus, hypothesis 3 cannot be supported.

As a reminder, because the hypothesis testing involves a great deal of complex information, most

of which is not significant, only the significant results are discussed next. However, all results

are including in Appendix 3.

H4: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and may be moderated by the participant's moral identity.

Figure 4.11: Model for hypothesis 4
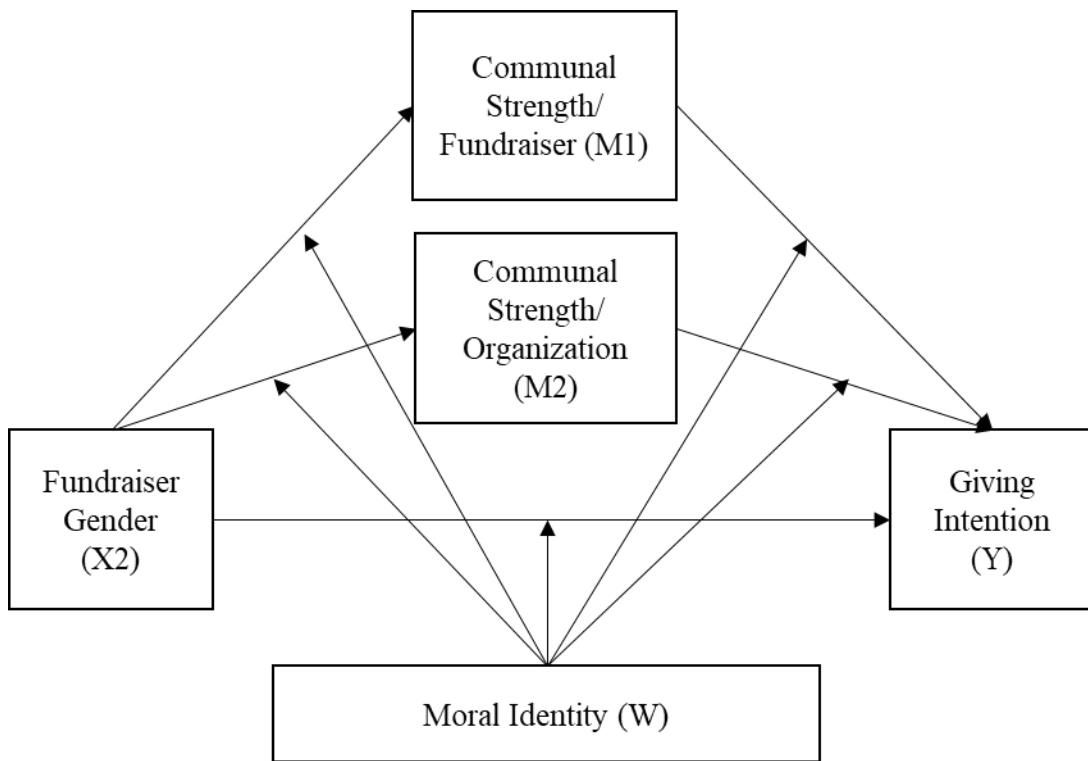
This analysis investigated the effect of the second independent variable, fundraiser gender, as well as the previously mentioned mediators and moderator, on the dependent variable. The significant results are discussed next.

For this hypothesis, significant effects were found with fundraiser gender predicting feelings of

communal strength toward the fundraiser. The results of this analysis are presented in Figure

4.12. Significant results are indicated with a *.

Figure 4.12: Results of the effect of fundraiser gender on donor's feelings of communal strength toward the fundraiser
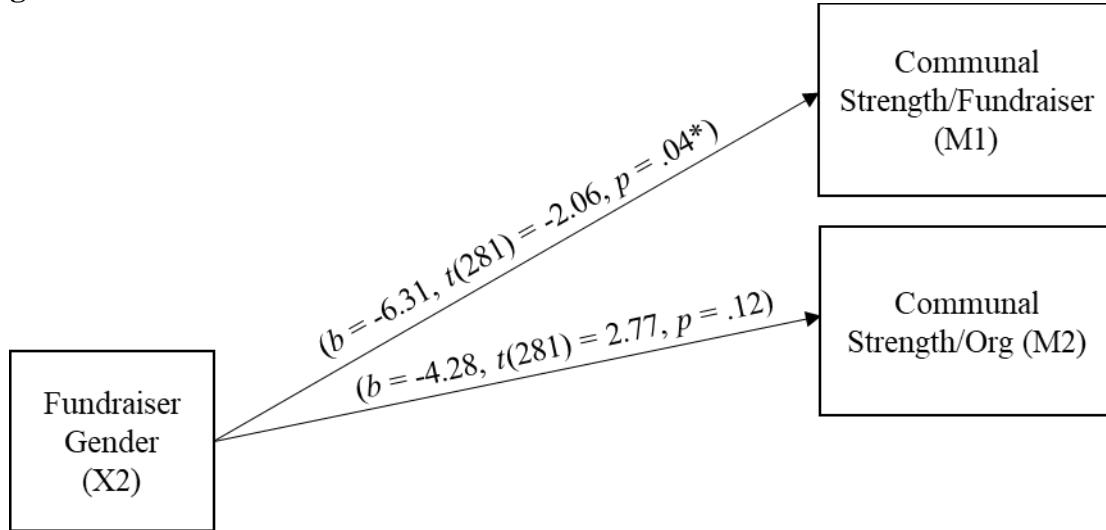
In the current research, fundraiser gender was coded as $1 =$ male and $0 =$ female. Thus, the

results above can be interpreted to mean that participants who were assigned a female fundraiser

reported significantly higher feelings of being willing to sacrifice to maintain a relationship with

the fundraiser: 6.31 units higher than participants who were assigned the male fundraiser.

Although 'units' of communal strength are intangible, the results indicate that participants have

stronger communal feelings toward female fundraisers than male fundraisers. This is interesting

given the dominance of female fundraisers in the industry (Breeze, 2017). If donors are more

willing to make financial or relational sacrifices to maintain their relationships with female

versus male fundraisers, this could mean that female fundraisers would be more likely to

215

maintain strong relationships with their donors than their male counterparts, and possibly raise

more money. What is also interesting is that there is no significant relationship between

communal strength and giving, indicating that in the current research, communal strength did not

impact donors' giving. Their feelings of communal strength did not translate to donors' making

financial sacrifices.

One additional significant result was found in testing hypothesis 4. The two-way interaction

between fundraiser gender and moral identity on participants' feelings of communal strength

toward the fundraiser was moderately significant at $p = .06$. A model depicting the results is

provided in Figure 4.13.

Figure 4.13: Results of the two-way interaction between fundraiser gender and moral identity on the mediators
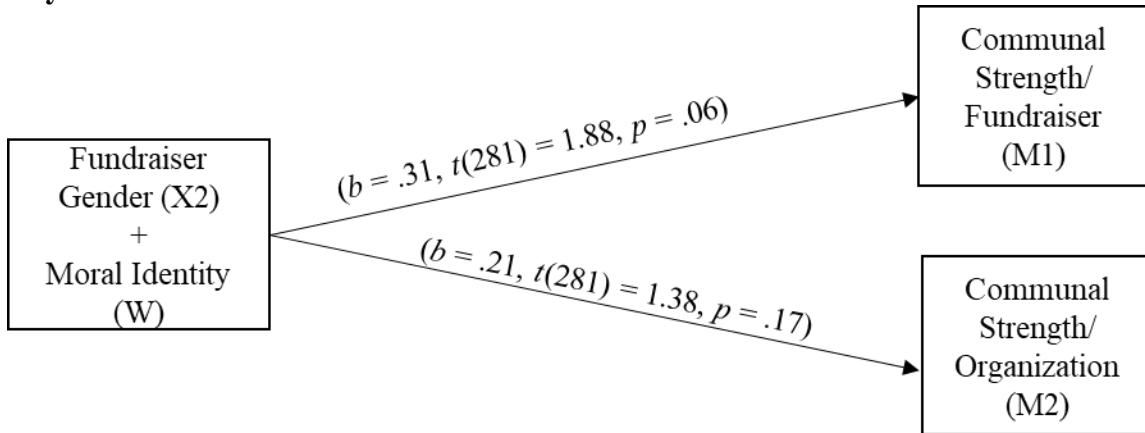
These moderately significant results are described because when the conditional value of the

moderator is considered, the analysis revealed that the effect that a donor's moral identity has (in

combination with the fundraiser's gender) is only significant for individuals with lower moral

identity. So, when all levels of donors' moral identity are considered, the results are moderately

significant, however, when moral identity is considered at different levels, we see that the

relationship is only significant for donors with lower levels of moral identity. Results are

presented in Table 4.19.

Table 4.19: Results for the effect of fundraiser gender on feelings of communal strength toward the fundraiser at differed levels of moral identity

Moderator Group	b	t	p	LLCI	ULCI
Low moral identity	-1.6805	-2.0815	.0383*	-3.27*	-.09*
Average moral identity	-.2921	-.4579	.6474	-1.55	.96
High moral identity	.1707	.2264	.8211	-1.31	1.66

 * significant when p < .05 and the LLCI and ULCI do not contain zero

This means participants who were assigned a female fundraiser felt significantly higher feelings

of being willing to sacrifice, incur costs and would feel distress if they could not meet female

(but not the male) fundraiser's needs, however, as indicated in Table 4.18, this is only true for

participants with lower moral identity. This is interesting to the current research because moral

identity has not been explored in a major giving scenario before and indicates that donors' moral

identity may play a role in how their relationships with fundraisers develop. For example, major

donors with lower moral identity may be more willing to sacrifice their privacy, by divulging

additional information about themselves, to meet the female fundraisers' perceived needs.

However, it should be noted that the participants in the current research reported relatively high

levels of moral identity, so additional research is needed.

Hypothesis 5

H5: The relationship between a fundraiser's disclosure content and a donor's giving intention will be mediated by a donor's feelings of connection a) toward the fundraiser and b) toward the organisation the fundraiser represents and may be moderated by the participant's moral identity.

Figure 4.14: Model for hypothesis 5
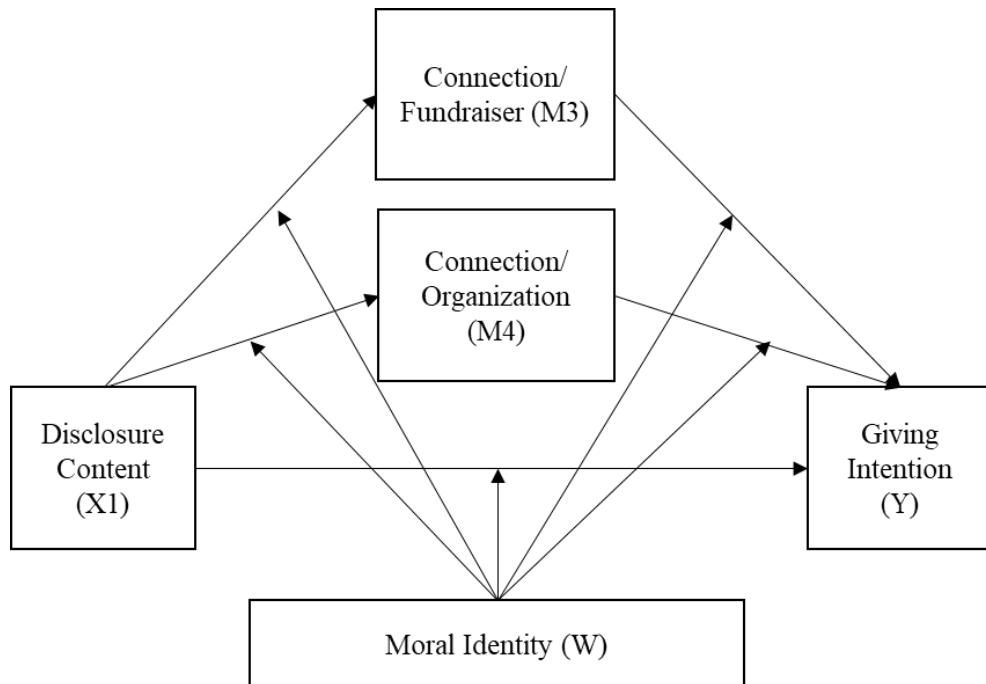
Hypothesis 5 tested a new mediator, connection, and its relationship to a fundraiser's disclosure content and a donor's giving intention. Moral identity was once again investigated as a possible moderating variable. Some evidence of moderated mediation occurred during this test. The significant results are presented next, and the nonsignificant results are reported in Appendix 3.

First, the analysis indicated that there is a positive relationship between fundraiser's disclosure and donor's feelings of connection to the fundraiser. Results are presented in Figure 4.15.

Figure 4.15: Results of the effect of disclosure content on donors' feelings of connection
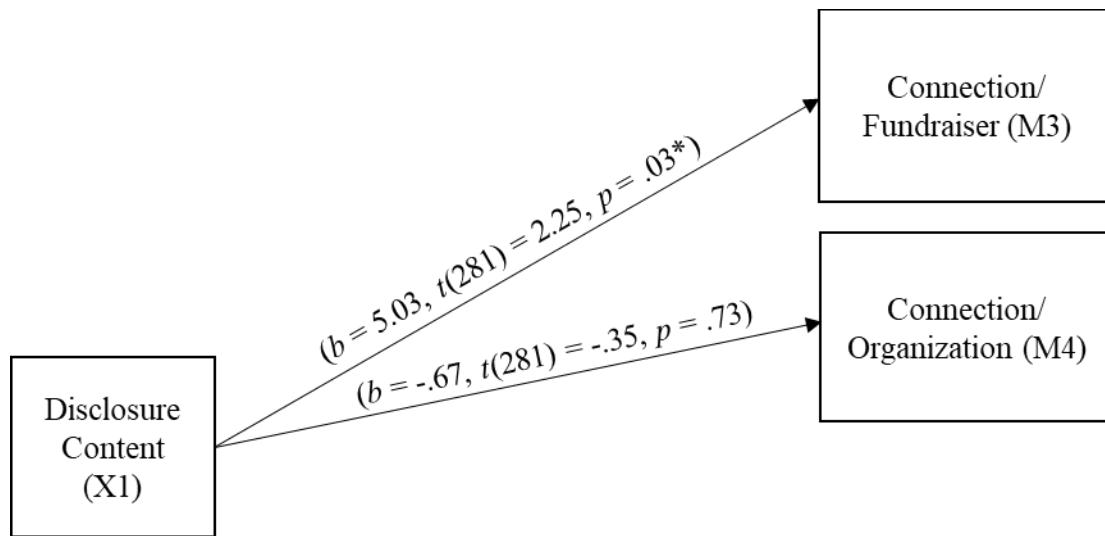
This indicates that fundraisers' disclosure increases participant's feelings of connection toward the fundraiser. Once again, although 5.03 'units' of connection is obscure, it indicates that in this instance self-disclosure is strongly and positively related to participants' feelings of connection with the fundraiser. This is important to understand because individuals are more likely to remain in relationships with others to whom they feel connected (Laurenceau et al., 2004) and fundraisers who are able to establish strong, long-term relationships with donors raise more money (Breeze, 2017).

Similar to the results of hypothesis 3, result from hypothesis 4 indicate significant two-way

interaction between fundraisers' disclosure with donors' moral identity on donors' feelings of

connection toward the fundraiser. This interaction was significant (b = -.24, t(281) = -2.03, p =

.04), however, once the conditional levels of the moderator were considered, the results were

only significant for participants with lower moral identity. Results are presented in Table 4.20.

Table 4.20: Conditional effects of disclosure type on feelings of connection to the fundraiser at various levels of moral identity

Moderator Group	b	t	p	LLCI, ULCI
Low moral identity	1.3725	2.3564	.0191*	.2260, 2.5190*
Average moral identity	.2762	.6102	.5422	-.6148, 1.1672
High moral identity	-.0892	-.1659	.8683	-1.1480, .9695

* significant at p = < .05 or when the LLCI and ULCI do not include zero

These findings are interesting because they indicate donors' moral identity is driving their

feelings about the fundraisers. Fundraiser's self-disclosure seems to have a stronger impact on

donors with lower moral identity, which may affect the way donors and fundraisers interact and

their ability to develop strong, long-term relationships. Perhaps donors with lower moral identity

are more ambivalent about their giving and need a stronger relationship with the fundraiser to

feel compelled to give.

Next, evidence of conditional indirect effects is reported. Indirect effects provide evidence of

mediation. Indirect effects occur when the relationship between two variables, for example, self-

disclosure and giving, is explained by a third variable, in this case, feelings of connection to the

fundraiser. Conditional indirect effects occur when the mediated relationship is conditional upon

the presence of another variable, in this case, moral identity. Significant conditional indirect

effects provide evidence of moderated mediation. Results are presented in Table 4.21.

Table 4.21: Results for the conditional indirect effects of disclosure content on giving through feelings of connection to the fundraiser at different levels of moral identity

Moderator Group	b	BootSE	LLCI, ULCI
Low moral identity	.3706	.2103	.0164, .8252*
Average moral identity	.0562	.0999	-.1399, .2703
High moral identity	-.0162	.1050	-.2445, .2005

 * significant when the LLCI and ULCI do not contain zero

This means that participants give significantly more after receiving a fundraiser's self-related

disclosure, and that their decision to give can be explained by their feelings of connection to the

fundraiser. However, this is only true for participants who have lower moral identity. These

findings highlight several important findings. First, in this analysis, the fundraiser's self-

disclosure predicted higher giving for donors with lower moral identity. Participants' feelings of

being connected, bonded, and attached to their fundraisers helped explain their higher giving

levels. It could be that donors with lower moral identity are more driven by their feelings about

the fundraisers (i.e., feelings of being connected) when deciding how much money to donate,

whereas donors with higher moral identity are driven by a sense of donating is the 'right' thing to

do.

No other significant results were found. Results for hypotheses 6, 7 and 8 are presented in

Appendix 3.

4.1.6 Phase 1: Section Summary

Overall, few significant results from Phase 1 were found, which was unexpected. These results from each hypothesis are reviewed first, followed by a discussion of how the results relate to the Phase 1 research questions.

Hypothesis testing summary

H1: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be moderated by a donor's moral identity.

Hypothesis 1 is not supported. During the statistical analysis, a significant two-way interaction between disclosure type together with moral identity on giving intention was not discovered.

H2: The relationship between a fundraiser's gender and a donor's giving intention will be moderated by a donor's moral identity.

Hypothesis 2 is not supported. The two-way interaction between the fundraiser's gender with the donor's moral identity on a donor's giving intention was not statistically significant.

H3: The relationship between a fundraiser's self-related disclosure and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

No significant results were found for hypothesis 3. Thus, it cannot be supported.

Hypotheses 3 – 8 investigated whether the fundraiser's disclosure would affect the way donor's

feel, not just about the fundraiser, but also about the organization the fundraiser represents (the

ripple effect). However, statistical evidence of this was not discovered in any of the hypotheses.

In addition, analysis of hypothesis 3 examined the effects of disclosure content, communal

strength toward the fundraiser, communal strength toward the organization, and a donor's moral

identity on a donor's giving intention, however, no statistically significant results were found.

Finally, two-way interactions between moral identity together with disclosure content, communal

strength toward the fundraiser, communal strength toward the organization on giving intention

were also studied and no significant results were found.

H4: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of communal strength a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

Hypothesis 4 can be partially supported. Evidence of a statistically significant relationship

between a fundraiser's gender and a donor's feelings of communal strength toward the fundraiser

was discovered, meaning that participants who were assigned a female fundraiser reported

significantly higher feelings of being willing to sacrifice to maintain a relationship with the

fundraiser than participants who were assigned a male fundraiser. However, results were not

significant for the effect of fundraiser's gender on a donor's feelings of communal strength

toward the organisation.

223

In investigating two-way interactions, the relationship between fundraiser gender with moral identity on participants' feelings of communal strength toward the fundraiser was moderately significant. However, in looking at the effects of moral identity at different levels of moral identity, the analysis revealed that the effect is only significant for individuals with lower moral identity.

H5: The relationship between a fundraiser's disclosure content and a donor's giving intention will be mediated by a donor's feelings of connection a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

Hypothesis 5 can be partially supported. When fundraisers self-disclose, participants feel more connected to the fundraiser, as evidenced by a positive and statistically significant relationship between the fundraiser's disclosure content and participant's feelings of connection toward the fundraiser.

In addition, results from hypothesis 5 indicate significant two-way interaction between fundraisers' disclosure with donors' moral identity on donors' feelings of connection toward the fundraiser. Although this relationship was statistically significant, a deeper dive into the data reveals that the effect of a fundraiser's disclosure with a donor's moral identity is significant, once again, only for donors with lower moral identity. These donors seem to be more strongly impacted by fundraisers' self-disclosure, making them feel more connected to the fundraiser than donors with moderate and high levels of moral identity.

Finally, analysis of hypothesis 5 revealed evidence of conditional indirect effects, or moderated

mediation. A statistically significant relationship between self-disclosure and giving was found

to be mediated, or explained, by a third variable, feelings of connection to the fundraiser.

However, this relationship was conditional on donors' moral identity, and once again, significant

effects were only found for donors with lower moral identity. This indicates that donors with

lower moral identity may need to feel bonded or connected to the fundraiser in order to also feel

compelled to give, and the fundraiser's self-disclosure helps facilitate these feelings of

connection.

H6: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of connection a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

This hypothesis cannot be supported. The analysis of these variables did not indicate any

statistically significant relationships. Results can be found in Appendix 3.

H7: The relationship between a fundraiser's disclosure content and a donor's giving intention will be mediated by a donor's feelings of commitment a) toward the fundraiser and b) toward the organisation the fundraiser represents and will be moderated by the participant's moral identity.

This hypothesis cannot be supported. No statistically significant results were found. Results can

be found in Appendix 3.

H8: The relationship between a fundraiser's gender and a donor's giving intention will be mediated by a donor's feelings of commitment a) toward the fundraiser and b) toward the

organisation the fundraiser represents and will be moderated by the participant's moral identity.

This hypothesis cannot be supported. During the statistical analysis process, no statistically significant results were found. Results can be found in Appendix 3.

Discussion of Phase 1 Research Questions

Research Question 1: Does the content of a fundraiser's self-disclosure predict a donor's giving intention?

This question was difficult to answer because the construct analysis for high depth and mission-related disclosure failed. See Section 4.1.3 for more detail about the construct analysis process. Thus, the only type of disclosure content included in hypothesis testing was for self-related disclosure.

Some evidence that fundraiser's disclosure increased donors' giving intention was presented in the results from hypothesis 5. These results found that fundraiser's disclosure was significantly and positively related to donor's giving, as a result of donor's feelings of connection toward the fundraiser. However, this was only true for donors with lower moral identity.

Research Question 1a: Are the results of research question 1 different for male and female fundraisers?

There was no evidence that fundraiser's gender predicted donors' giving intentions. However, the statistical analysis revealed other interesting results. For example, results showed that when

participants were assigned a female fundraiser, their feelings of communal strength toward the fundraiser increased significantly. Communal strength is a quantitative measurement of communal relationships and indicates the extent to which a person feels responsible for, the cost an individual is willing to incur to meet the needs of, as well as how much distress a person would feel if he/she could not meet the needs of, in this case, the fundraiser. This finding is interesting because it indicates that donors feel much stronger feelings toward female fundraisers. However, the relationship between communal strength and donor's giving intention was not significant, which indicates that donors' feelings of wanting to incur costs and make sacrifices may not include those that are financial.

Further analysis showed that this effect was particularly significant, once again, for participants with lower moral identity. The results of hypothesis 5 demonstrated that only donors with lower moral identity felt increased feelings of communal strength to the fundraiser when they were assigned a female (but not a male) fundraiser. One explanation for this may be that participants perceived that disclosure from female, but not male, fundraisers was more welcoming, expected or appropriate. This would tie back to previous research that suggests that women are expected to be more open, warm and expressive than their male counterparts (Shaffer et al., 1992).
Why these expectations may be stronger or more important for individuals with lower moral identity warrants additional research.

Research Question 2: Is there a relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents? That is, is there a "ripple effect"?

There is no evidence of the fundraiser's disclosure impacting participants' feelings about the

organization the fundraiser represents, was found. Although significant and positive relationships

were found between a fundraiser's self-disclosure and participants' feelings of connection and

communal strength toward the fundraiser, these effects did not spill over to impact the way

participants felt about the organisation the fundraisers represent.

Research Question 3: Do variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention?

Researchers who study self-disclosure identified a need for thorough investigations of potential

mediating variables which could help explain how self-disclosure influences relational

development (Sprecher & Hendrick, 2004) and behaviour (Haytko, 2004). Potential mediators

investigated in the current research included communal strength, connection, and commitment.

The only variables that affect donors' giving intentions were described in the discussion of

research question 1.

A potential moderator was also explored as part of the current research – moral identity. This

was identified as a variable of interest because moral identity is a social identity which can

influence individuals thoughts, actions and behaviours (Markus, 1977). Additionally, donors may

be more likely to have high moral identity (Shang et al., 2020), which is a self-concept organised

around a set of moral traits (Aquino & Reed, 2002). Two of the three significant findings from

Phase 1 results were conditional upon moral identity. That is, the results were significant only for

participants with lower moral identity. Simply put, more research is necessary to understand how

donors' moral identity is related to their feelings and behaviours. Additionally, understanding the role moral identity plays in fundraising relationship development process could be an interesting area of future exploration. Based on the current findings, fundraising managers may want to screen donors based on their moral identity and make decisions about fundraiser assignments based on that information (i.e., assigning female fundraisers to donors with lower moral identity).

Justification for Phase 2 Research

After analysing findings from Phase 1, the researcher determined additional information was needed to answer the overarching research aim to investigate what role fundraisers' self-disclosure plays in fundraiser-major donor interactions. Of particular interest was the context in which fundraisers are choosing to disclose to donors, the content that they choose to disclose and the effects of their disclosure on the fundraiser/donor relationship. Thus, an additional phase of research was needed to further explain the results from the quantitative phase and fully answer the research aim, and a sequential explanatory approach was taken. As mentioned in Chapter 3, the sequential explanatory design is a two-phase, mixed method approach that begins with quantitative research and follows up with a qualitative phase that is used to explain the quantitative results (Creswell & Plano Clark, 2018). This design is particularly helpful when "the researcher needs qualitative data to explain nonsignificant results" (Creswell & Clark, 2018, p. 77). Thus, results from the qualitative Phase 2 are described in the sections that follow.

4.2 Phase 2: Qualitative

The following section discusses findings from the qualitative Phase 2 of this sequential explanatory mixed methods research. The chapter begins with a review of the research aims of the Phase 2 semi-structured interviews. Next, a description of Phase 2 participants is presented. Finally, results from the theoretical thematic analysis are described. Themes identified as part of the analysis are used to explain the quantitative results from Phase 1 in more depth.

4.2.1 Phase 2: Aims of semi-structured interviews

Sequential explanatory mixed method consists of two distinct phases: first, the quantitative phase (Phase 1), followed by a qualitative phase (Phase 2) which helps explain or elaborate on the findings from the first phase (Creswell & Clark, 2017). Thus, the aims of the Phase 2 semi-structured interviews were to help explain, in particular, the non-significant results from Phase 1 with the following research questions:

- How do major gift fundraisers use self-disclosure during interactions with major donors?
- How do male and female major gift fundraisers use self-disclosure differently during interactions with major donors?

4.2.2 Phase 2: Description of participants

During Phase 2, 20 participants were recruited using the chain-referral sampling strategy described in Chapter 3 (Bagheri & Saadati, 2015). Participants' titles and information related to their professional experience is provided in Table 4.22.

Table 4.22: Phase 2 Participant Profile

#	ID	Title	Carnegie Classification	Years worked in fundraising	Years in current role	Donors in portfolio
1	F03	Vice President for Advancement	Private not-for-profit	10+	1-3 years	100+
2	M04	Director of Development	Public	6	1-3 years	76-100
3	F07	Assistant Vice President of Development	Public	10+	4-9 years	1-25
4	F08	Executive Director of Development	Public	10+	4-9 years	76-100
5	F11	Director of Development	Public	10+	1-3 years	26-50
6	M12	Associate Vice President of Advancement Strategy	Private not-for-profit	6	4-9 years	100+
7	M13	Chief Advancement Officer	Public	10+	1-3 years	26-50
8	M14	Vice President for Institutional Advancement	Private not-for-profit	10+	1-3 years	51-75
9	M09	Vice President of Advancement	Private not-for-profit	10+	1-3 years	51-75
10	M10	Assistant Vice President of Development	Public	10+	4-9 years	100+
11	F24	Senior Regional Director, Development	Public	10+	4-9 years	76-100
12	F25	Senior Director	Public	10+	1-3 years	26-50
13	M16	Executive Director of Major Gifts	Private not-for-profit	10+	4-9 years	100+
14	F20	Director of Development	Public	10+	1-3 years	100+
15	F05	Interim President and Assistant Vice President	Public	10+	4-9 years	26-50
16	M15	Vice President of Relations	Private not-for-profit	10+	10+ years	51-75
17	M17	Director of Gift + Estate Planning	Public	7	1-3 years	76-100
18	F18	Senior Philanthropy Officer	Private not-for-profit	7	4-9 years	76-100
19	F27	Senior Director	Private not-for-profit	10+	4-9 years	51-75
20	M22	Senior Philanthropy Officer	Private not-for-profit	10+	4-9 years	100+

Participants were 10 female and 10 male full-time major gift fundraisers at higher education institutions in the United States. Although no correct sample size for the qualitative phase of a sequential explanatory design has been identified (Smith, 2015), there is some consensus surrounding smaller sample sizes. For example, Creswell and Plano Clark (2018) refer to sequential explanatory studied that included four (Ivankova & Stick, 2007), five (Schindler & Burkholder, 2014), eight (Cantarelli et al., 2020), and 12 particpants (Igo et al., 2008). It was important to have adequate numbers of both male and female participants to address the questions related to gender differences, however, based on the sample sizes from the studies mentioned above, it was determined that the sample size for the current research was adequate.

All 20 participants worked at U.S. institutions of higher education, however, 11 participants worked at public institutions and nine worked at private not-for-profit institutions as defined by the Carnegie Classification of Institutions of Higher Education (Center for Postsecondary Research, n.d.). The Carnegie Classification is the leading framework for recognizing and describing institutional diversity in U.S. higher education (Center for Postsecondary Research, n.d.). Its purpose is to provide researchers with classifications that enable them to compare and contrast institutions with unique characteristics (Center for Postsecondary Research, n.d.). For example, in the U.S., public institutions of higher education are government-funded, while private institutions rely more heavily on tuition and endowment revenue (Satterwhite & Cedja, 2005). Having a mix of public and private institutions was important to provide a representative cross section of U.S. institutions because there is some evidence that private institutions rely more heavily on fundraising (Satterwhite & Cedja, 2005) which could potentially influence fundraising strategies and tactics. Also, participants representing a variety of institutions were

chosen to make the findings relatable for a larger number of higher education fundraising

programmes.

Participants' demographic information and experience in fundraising is presented in Table 4.23:

Table 4.23: Participant demographics

#	Participant ID	Gender	Age range	Highest education completed
1	F03	F	45-54	Graduate school
2	M04	M	25-34	Graduate school
3	F07	F	45-54	Graduated from college
4	F08	F	45-54	Graduated from college
5	F11	F	45-54	Graduate school
6	M12	M	55-64	Graduate school
7	M13	M	45-54	Graduate school
8	M14	M	55-64	Graduate school
9	M09	M	45-54	Graduate school
10	M10	M	45-54	Graduated from college
11	F24	F	35- 44	Graduate school
12	F25	F	35-44	Graduated from college
13	M16	M	35-44	Graduate school
14	F20	F	45-54	Graduate school
15	F05	F	45-54	Graduate school
16	M15	M	55-64	Graduated from college
17	M17	M	25-34	Graduate school
18	F18	F	55-64	Graduated from college
19	F27	F	55-64	Some graduate school
20	M22	M	45-54	Graduate school

Table 4.23 identifies participants' demographic information, including gender, age and the

highest education level they have completed. Note that each Participant ID is made up of a letter

and a number. The letter indicates whether the participant identified as female or male. This

indicator helped the researcher during the thematic analysis process, for example quickly

identifying gender differences within themes. The number was assigned to each participant

during the recruitment process and participants are listed in order of when the interviews occurred. For example, participant F05 is a female fundraiser who was the fifth person recruited to participate in the study, however, she was the 15th interview conducted. The reader should consider the Participant ID as simply a placeholder for the participant's name. Pseudonyms were not used because studies suggest that some participants may prefer simply to be referred to by characteristics such as gender and age-range (Corden & Sainsbury, 2006).

Participants were experienced fundraising professionals and mostly representative of major gift fundraising professionals. A majority (16 of 20 participants) had 10 or more years of experience in fundraising. Nine participants had been working in their current role for 1-3 years, 10 had been working in their current role for 4-9 years and one had been working in their current role for 10 or more years. Six participants managed portfolios of more than 100 major gift donors and prospects; 5 managed portfolios of 76-100; 4 managed portfolios of 51-75; 4 managed portfolios of 26-50; and one participant managed a portfolio of 1-25. Participants' years of experience in fundraising and portfolio size allowed them to draw on a wide range of experiences interacting with many major donors and describe their interactions with over multiple years, providing rich detail for answering the research questions.

Half of participants were in the 45-54 age range (10 of 20 participants); 5 participants were 55 or older; 3 participants were 35-44 and 2 participants were under age 35. All participants in this study were white except one, who identified as black. This may be a limitation of the current research; however, fundraisers tend to be a homogeneous group (Breeze, 2017; Shaker & Nathan, 2017). Most, 13 of 20 participants, had completed graduate school; 1 participant had

completed some graduate school; 6 participants had graduated from college, which is also

representative of fundraisers in general (Breeze, 2017; Shaker & Nathan, 2017).

4.2.3 Phase 2: Thematic analysis process

Thematic analysis of the semi-structured interviews was conducted based on Braun and Clarke's

(2006) six phases, described in Table 4.24. After the table, a description of how the researcher

implemented each phase is provided.

Table 4.24: Phases of Thematic Analysis

Phase	Description of the process
1 – Familiarise yourself with your data	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
2 – Generating initial codes	Coding interesting features of the data in a systematic fashion across the entire data set, collating data relevant to each code.
3 – Searching for themes	Collating codes into potential themes, gathering all data relevant to each potential theme.
4 – Reviewing themes	Checking if the themes work in relation to the coded extracts (Level 1) and the entire data set (Level 2), generating a thematic 'map' of the analysis.
5 – Defining and naming themes	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells, generating clear definitions and names for each theme.
6 – Producing the report	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.

Source: (Braun & Clarke, 2006)

Phase 1: Familiarising yourself with your data

The first phase of thematic analysis involved the researcher reviewing all of the transcripts from the interviews. Transcripts were read repeatedly in an active way as recommended by Braun and Clarke (2006), which involved searching for meanings and patterns. Transcripts were verbatim accounts of the interviews. The researcher listened to and read each interview several times and reviewed transcripts for accuracy in content and delivery (i.e., capturing tone, facial expressions, etc. that help convey meaning of the words). The researcher identified a list of initial ideas based on the initial familiarization process and is included in Appendix 4.

Phase 2: Generating initial codes

After the researcher was familiar with the data and made a list of initial ideas, the researcher went back to each transcript individually to identify excerpts within the data that appeared interesting. These excerpts were highlighted within the transcript so that the context of the statement could be preserved. Using the comment function in Word, the researcher identified initial codes that could be applied to the excerpt. Next, the researcher created a separate Word document and cut and pasted the excerpt and the code from the transcript here. An example of this process is provided in Table 4.25:

Table 4.25: Example of initial codes

F03 (Participant identification code)	Initial codes
I don't often, you know, share a lot about my personal self. But I think that's where I, you know, you have to step up and start saying something to give them some ideas about... okay, here's what I thought I might hear from you. (Laughs) Do you know what I mean? And you have to, sort of you know, show them you know this is the conversation that you wanted to have. And see how comfortable they are with it…	Doesn't share a lot Fundraiser shares to get the donor to share Fundraiser modeling the desired behaviour

Next, the researcher created an Excel spreadsheet with multiple tabs. Each tab was labeled with an initial code and the related excerpts were recorded on each tab. During this stage of the thematic analysis, 143 initial codes were identified. An example of how excerpts from several different interviews were organised into one initial code is provided in Table 4.26.

Table 4.26: Example of excerpts organised by initial code

Participant ID	Initial code	Excerpts
F03	Fundraiser shares to get the donor to share	You know, you have to step up and start saying something to give them some ideas about... okay, here's what I thought I might hear from you. (Laughs) Do you know what I mean? And you have to, sort of, you know, show them, you know, this is the conversation that you wanted to have. And see how comfortable they are with it.
M04	Fundraiser shares to get the donor to share	I've already opened up with my story. I told him about my dyslexia and some of my things so he's feeling already vulnerable. So, you're kind of helping that relationship move forward by you being vulnerable to share to share trust that you're developing was the donor.
M09	Fundraiser shares to get the donor to share	You know, sometimes I'll do it if it's hard to get the conversation started, right? What are some things that I might throw out there that might… and I'll just kind of throw some things out there, see what kind of gets it going. Sometimes

| | | that starts the conversation, sometimes it's me saying: "Oh, I went to UNIVERSITY. I'm a big UNIVERSITY fan," if I think they could be a UNIVERSITY fan or – there's a big rivalry there – so I'll throw out something about me to see if I get them talking. Sometimes it works. Sometimes it doesn't. |

The capitalised text in the excerpt indicates that identifying information was removed.

Phase 3: Searching for themes

Once initial codes were identified in each transcript and excerpts from all transcripts were collated based on the initial codes, the analysis began to shift from identifying codes to sorting the codes into broader categories that were identified as potential themes (Braun & Clarke, 2006). At this point, the researcher used an Excel document to organise the initial codes, moving codes around, grouping, ungrouping, color coding, changing colors, adjusting, and sorting codes to create cohesive potential themes. The researcher made decisions about initial themes based on the relationship between the initial codes, and between the themes themselves. Some overarching themes contained sub-themes. At the end of this phase, all 143 initial codes were organised into seven potential themes. The seven potential themes included:

1. Disclosure outcomes

2. Deciding to disclose

3. Disclosure content

4. Reasons for disclosure

5. Gender differences

6. Emotions

7. Miscellaneous

Using the potential theme 'disclosure outcomes' as an example, Table 4.27 shows how the initial

codes were organised with it.

Table 4.27: Example of initial codes organised to create a potential theme

Initial codes	Potential theme
donor reaction to sharing	
link between sharing-giving	
rewarded for being vulnerable	
ex: donor giving after sharing	
sharing not connected to giving	
rewards of sharing	
solicitation easier	
dealing with conflict	
impacts of sharing	
allows honest conversations	
speeds up the ask	
sharing helps cultivation	Disclosure outcomes
helps with stewardship	
impacts - donor giving experience	
becoming friends	
sharing signal for relationship	
difference between donor-friend	
sign of a good fundraiser	
link to job satisfaction	
fundraiser ideals	
sharing strengthens relationship	
differentiate from other fundraisers	
impacts feelings about university	

Phase 4: Reviewing themes

In the next stage, the researcher began narrowing the potential themes even further (Braun &

Clarke, 2006). This was achieved by reading all the excerpts from each potential theme to ensure

that 'coherent patterns' existed within each theme (Braun & Clarke, 2006, p. 91). At this point,

excerpts that didn't seem to fit were moved to other themes or discarded into the miscellaneous theme, and the researcher was left with a set of a preliminary themes that could be used to create a preliminary thematic map (Braun & Clarke, 2006).

Before developing the map, however, the researcher reviewed all the transcripts again (the entire data set) to consider the preliminary themes in relation to the data set, and to compare the preliminary themes against the entire data set to ensure it accurately reflected participants responses (Braun & Clarke, 2006). This also gave the researcher a chance to identify codes that were missed during the earlier stages of analysis. The preliminary themes were tweaked throughout the process and a version of the preliminary thematic map resulted when no more substantial changes could be made (Braun & Clarke, 2006). The preliminary thematic map is depicted in Figure 4.16:

Figure 4.16: Preliminary thematic map
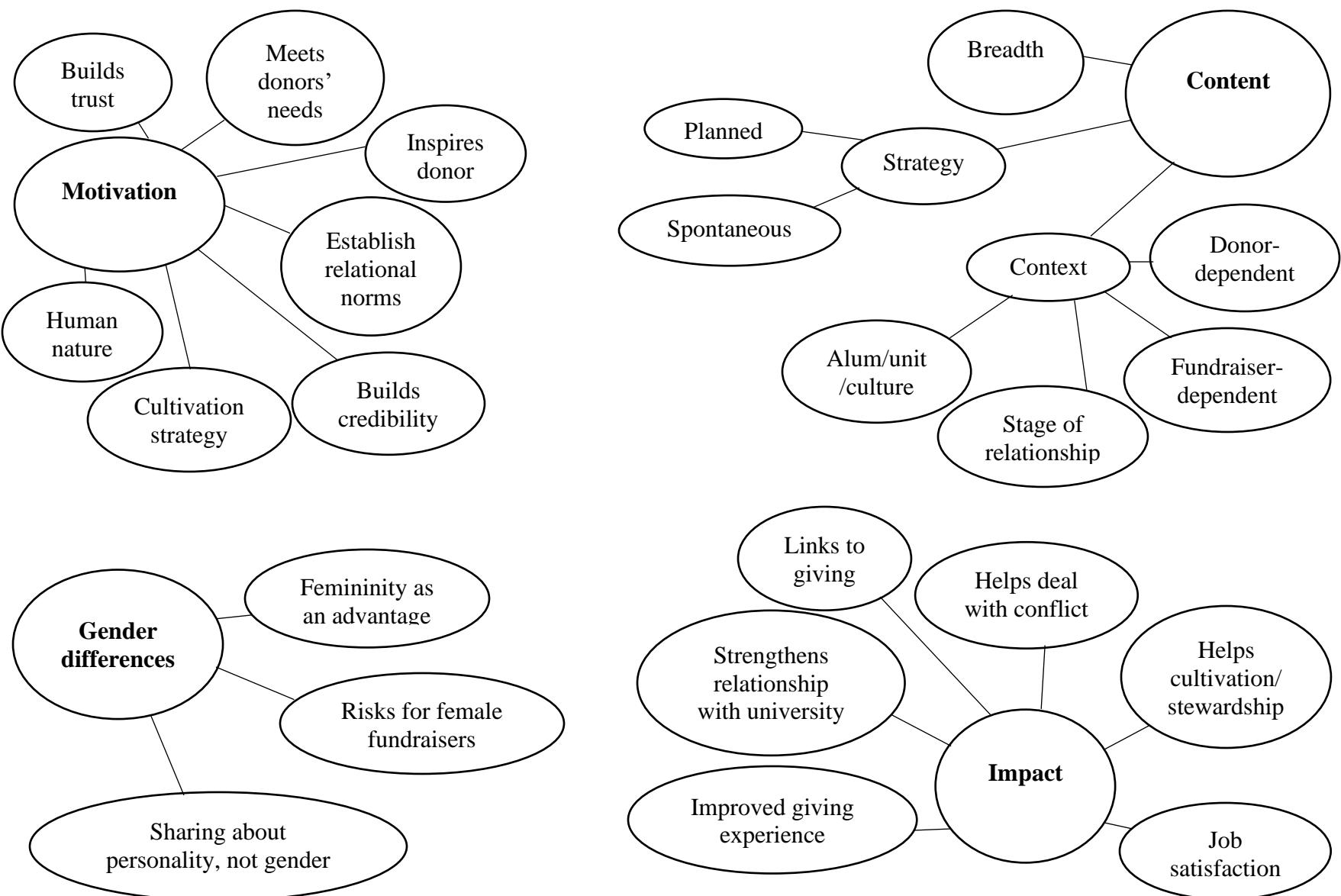
Phase 5: Defining and naming themes

Once the preliminary map (Figure 4.16) was complete, the researcher considered how the themes identified thus far could explain the results from Phase 1 and fully answer the overarching research question. Reviewing the Phase 1 hypotheses (see Section 2.5) and Phase 1 research questions (see Section 3.1.1), the researcher decided to focus on the relationship between the independent and dependent variables in Phase 1 (see Table 3.4.2 for a list of variables included in Phase 1). (The mediators and moderators were not relevant to the Phase 2 research because they measure donors' feelings, and the Phase 2 research is interested in understanding fundraiser's perspectives.) The independent variables in the Phase 1 research are disclosure *content* and *gender*. The dependent variable, giving intention, is a measure of the *impact* the disclosure had on the donor's behaviour (i.e., decision to give).

In this stage of the thematic analysis, Braun and Clarke (2006) recommend that final refinements of the themes occur. Thus, the researcher used *content*, *gender differences*, and *impact* to further refine the preliminary themes identified in Figure 4.16. That is, the researcher went back to the preliminary themes and asked, *how do these themes and subthemes help explain what sort of content do fundraisers disclose during their interactions with major donors*? And *how do the preliminary themes and subthemes help explain potential gender differences in the way that male and female fundraisers use self-disclosure in their relationships with major donors*? In addition, the researcher asked, *how do these themes and subthemes help explain the impact did the fundraisers' self-disclosure have on the fundraiser-donor relationship*? Focusing on content, impact and gender differences allowed the researcher to connect the data from Phase 1 and Phase

2, a primary goal of the sequential explanatory research design (Creswell & Plano Clark, 2018). According to Braun and Clarke (2006), a thematic analysis can provide a rich description of an entire data set, or, as in the case of the current research, it can relate to a specific 'area of interest within the data set'. This aligns with the purpose of a sequential explanatory approach (Creswell & Plano Clark, 2018) and was the approach utilised with the current research.

With questions related to content, gender differences and impact in mind, the researcher revisited the collated data excerpts representing each preliminary theme displayed in Figure 4.16 and further organised excerpts to ensure they logically and consistently represented 'essence' of the theme, as recommended by Creswell and Plano Clarke (2006, p. 92). Excerpts and themes were eliminated that did not relate back to the specific areas of interest (content, gender differences and impact). The researcher took notes and compiled thoughts throughout this stage to define the final themes and to help identify the 'story that each theme tells' (Creswell & Plano Clark, 2018, p. 92), paying special attention to not just summarise participants' responses, but also provide more detailed analysis. What was left at the end of this stage were the final themes, presented in the next section.

4.2.4 Phase 2: Thematic analysis findings

This section describes the sixth phase of thematic analysis identified by Braun and Clarke (2006), which involved producing a narrative description of the final themes, selecting descriptive examples from participant excerpts, and relating the findings back to the research questions and literature. Five final themes and ten subthemes were identified, and each tied back

to the areas of interest (content, gender differences and impact) identified from Phase 1. The

frequency of each theme is indicated in Table 4.28. Frequency indicates the number of individual

participants (unduplicated) who expressed the identified theme. Frequency was only one

criterion used to determine a theme. Braun and Clarke (2006) point out, "the 'keyness' of a

theme is not necessarily dependent upon quantifiable measures – but rather on whether it

captures something important in related to the overall research question," (p. 82). Following

recommendations outlined by Braun and Clarke (2006), themes were established based on the

researcher's judgment and considering prevalence within individual interviews and across the

entire set of interviews. The names of themes describe what is important and interesting about

each theme (Braun & Clarke, 2006).

Table 4.28: Areas of interest from Phase 1 and themes identified in Phase 2

Area of interest	Themes and Subthemes	Frequency
Content	Theme 1: Context matters	20
	• Disclosure is donor-dependent	19
	• Disclosure is fundraiser-dependent	18
	Theme 2: Content delivery	20
	• Spontaneous disclosures	20
	• Planned disclosures	14
Impact	Theme 3: Relational benefits	20
	• Disclosure builds trust and credibility	18
	• Disclosure strengthens donors' relationships	20
	Theme 4: Links to giving	14
	• Disclosures lead to donor behaviour changes	14
	• Disclosures improve donors' giving experience	13
Gender differences	Theme 5: Rewards and risks for female fundraisers	17
	• Femininity as an advantage	9
	• Disclosure dangers for female fundraisers	7

Theme 1: Context Matters

The first two themes (and related subthemes) help explain the *content* of fundraisers' disclosure and how fundraisers use disclosure content in their interactions with major donors. This section introduces Theme 1, Context Matters. A discussion of the subthemes that follow provide additional detail and explanation of the theme.

When asked to reflect on moments when they shared personal information with donors, participants described how what they share depends on the context in which the sharing occurs. That is, they do not disclose the same content with every donor every time. Rather, what they share, when and with whom, depends on situational factors. Two subthemes emerged that help explain how the context of an interaction influences fundraisers' disclosure: disclosure is donor-dependent; and disclosure is fundraiser-dependent. Table 4.29 identifies the area of interest from Phase 1, theme and subthemes that will be discussed.

Table 4.29: Theme 1 and subtheme frequencies

Area of interest	Themes and Subthemes	Frequency
Disclosure content	Theme 1: Context matters	20
	• Subtheme 1a: Disclosure is donor-dependent	19
	• Subtheme 1b: Disclosure is fundraiser-dependent	18

Participants explained how they would vary the breadth or depth of their disclosures based on their feelings about the donor, past interactions with them, and well as participants' own level of comfort, ease, and general tendencies. This aligns with past research, such as Omarzu's (2000) self-disclosure decision making model that indicates that individuals take a number of factors

into consideration when deciding whether, when, and what, to disclose. Overall, all 20 participants described context as being a key determinant of what content is disclosed. A discussion of the subthemes that follows further explains how Context Matters.

Subtheme 1a: Disclosure is donor-dependent

Participants described that the content they shared with donors is donor-dependent. Among participants, 19 of 20 described disclosing more information to some donors than others. Participants made choices about their disclosure based on donors' communication style and personality. For example, the excerpts below describe how some participants restricted their disclosure with donors who like to talk about themselves and tend to dominate the conversation. Participants held back their own disclosure if they sensed there was no space for it in the conversation, or the relationship.

Examples:

"My husband (who is also a fundraiser) and I have also talked about this a lot, about how sometimes we meet people (donors) that just… they don't they don't know how to talk back and forth… like, they just take over the air time and there isn't that reciprocal thing… and I think he and I both have been brought up to understand it's not always about us, but you have to share a certain amount to be able to build those bridges (with donors)."
Participant F07

"*There's other times where someone will jump right in and they're gonna direct the conversation, which is great. And I figure out real quick I don't need to talk a whole lot.*"
Participant M16

"Some people really just want to talk about themselves. So I just try to measure, are they really looking to create a relationship, or do they? Are they looking to, you know, just kind of talk."
Participant F05

These examples show how fundraisers used unspoken cues from donors and their communication style to determine whether and how much to share about themselves.

Other donors asked fundraisers direct questions, which facilitated the fundraisers' sharing. Early in the relationship, these questions were typically about the fundraisers' past professional experience and association with the institution. In later stages of the relationship, after the two had known each other for some time, participants described how donors would ask more personal questions like, 'When are you going to have children?'. As a result of these questions, fundraisers' disclosure content increased in depth over time. The linear progression of disclosures beginning with more superficial information and leading to more personal information is evidence of social penetration theory (Altman & Taylor, 1973). Upon receiving requests for personal information from donors, fundraisers had to decide whether to share their true thoughts and feelings or dodge the question by changing the subject, as the examples below show.

Examples:

"I mean, just to give you some background like I'm (age) woman with a husband and a dog, and no kids, and people (donors) are always like, where, when are you going to have children? I'm like, well that's none of your business because like, because I'm not married to you."
Participant F24

"I've had donors who want to know every intimate detail of my life, and I can tell that they're you know like an open minded individual and I'll tell them a lot of detail. Other individuals you can tell they're just kind of asking just to like be nice like, Oh, do you have a wife and kids at home? And I just kinda like, cut it off and be like no I'm single. It's just me and the dog."
Participant M17

The examples above both demonstrate that fundraisers have agency in their decisions about whether to disclose to donors, similar to pasts studies that have investigated donor-fundraiser relationships (Shaker & Nelson, 2021). Participant M17, who disclosed during the interviews that he is gay, described how he is very willing to share personal information with some donors, who he perceives genuinely want to connect and will not be judgmental, but he is more guarded with other donors who he senses are just asking him questions out of a sense of obligation.

Many participants described 'clicking' with some donors versus others, which increased the depth and amount of disclosure from both parties and was characterised by a feeling of conversational comfort and ease. Evidence of this is shown in the examples below.

"So, I feel like it's reading the tea leaves and then figuring out who you connect with, and they're always some donors that you connect with a little bit more than others. You'll know. Like you'll just have that spark. You'll have that chemistry in the room, and you'll know that this is somebody you can be a little bit more yourself with."
Participant F25

"But I remember in that qualifying visit we shared quite a bit of personal information. It was… there was this click. I think we're similar age and similar mindset. And so, there was a lot more personal sharing than I would say is typical."
Participant F05

"And so, it was pretty much right off the bat, he and I, we just, at a meeting, we clicked, and I identified him as being one of those that I could connect with. And so, he and I just started

248

talking. He talked. We talked about his trips to COUNTRY. We talked about his family. We talked about, you know, his research. And UNIVERSITY. We talked about living in UNIVERSITY and here in CITY we talked about music and my background and music. We connected on a lot of stuff when we were on a phone call, and I was contacting him probably for a period of three or four months, I was probably communicating with him weekly. Yeah. So, we got to know each other real well. It's just he was just one of those really really nice guys that I just enjoyed talking to just I mean, I don't know he was warm. And it was like... I could open up to him if I needed to."
Participant M10

These examples describe how participants created an instant connection with some donors, which defies the predictable, linear progression of relationship development described by social penetration theory (Altman & Taylor, 1973). In these types of relationships, participants reported that the level of disclosure was much higher much quicker, as indicated by Participant F05. Other theories of relationship development present alternatives that might explain this phenomenon. For example, the clicking model (Berg & Clark, 1986) argues that individuals make early judgements about whether conversational partners meet their expectations of an ideal relationship. If their partner meets their expectations, the pace of relationship development speeds up considerably (Berg & Clark, 1986), encouraging more self-disclosure than is typical.

Participants also edited the content of their self-disclosure based on assumptions they make about what would be most impactful for donors or what donors might be most receptive to. For example, Participant M04, who went to seminary in New York before becoming a fundraiser, shared the following example:

"I was with an atheist (donor). So, I (was telling the story of when I) went to New York… I can't remember exactly how I told the story, but I (said I) was in New York studying philosophy and classical humanities to experience the beauty of the world to… I wanted to transform the world

to make the world a beautiful place -- which is 100% true --but I just left off the seminary piece because that wasn't gonna help that conversation."
Participant M04

Another participant, Participant F25, described how she modified stories about her background

depending on whether she thought the donor would be empathetic to her personal experiences.

"I was a student, came (to the U.S.) on a student visa. I met a guy, got married, and life has been fantastic here. But I do have that experience of what it's like to live in a different culture, country, in a country that doesn't have a lot of means, and what it takes to really like when they say, pull up your bootstraps. I go really into it. I know what that looks like, and then there's a version of that in the United States. So, my version of talking about, you know, what it means to get supports versus what needs to have opportunities to ask for support, like I have a very different take on that than some people. That works well for some, that does not work well for some. So, I kind of try to judge, you know, get a guess is this a person who's a little more open minding and can take conversation that isn't gonna be contentious per se, but is going to have a contrary opinion."
Participant F25

"But I will certainly change what I'm gonna talk about and so on based on what I know about that person or what said in the conversation or what I know about their background."
Participant M22.

Taken as whole, the examples provided in this section describe how fundraisers make

interaction-by-interaction decisions and vary the content of their disclosures based on which

donor they are speaking to.

Subtheme 1b: Disclosure is fundraiser-dependent

In the last section, the discussion of context was defined by participants' feelings about the

donors. This subtheme describes how participants' disclosure content is dependent on their own

general tendencies and characteristics. A majority (18 of 20) of participants described that self-disclosure content is fundraiser-dependent. For example, some participants described being an 'open book'. As demonstrated in the following excerpts, participants' general tendencies and personal preferences make them willing to share (just about) anything the donor asks or that comes up in conversation.

Examples:

"I share personal stories with donors every time I meet with them. So, whether it's like what my husband and I did over the weekend with our dog, or what our family is doing for holidays, I mean that that exchange is just so natural, and I don't think about it necessarily."
Participant F24

"You know, I do that (share personal stories) every visit. It can even be as simple as like… we're having our fourth kid right now, so…"
Participant M04

"I tell them stories about myself all the time. It may be my family, one of my sons, and how I might evoke, you know, it might be a football thing where they are into football, and their kids played football, and so I would tell them a story about my son and experience."
Participant M10

These participants, who share easily and often, are similar to participants from past studies of major gift fundraisers that find fundraisers are more talkative, less reserved, and more outgoing and sociable than the general public (Breeze, 2017). Other participants described having personalities and professional working styles that led to less disclosure with donors, as shown in these examples:

"You don't need to share all this stuff about your kids and dogs, and life and... you know what I mean? Because I want them leaving the conversation thinking more about UNIVERSITY than thinking more about you know, whatever's going on in my life."
Participant F03

"I do keep it professional. If they wanna add personal and I feel I feel comfortable, then I'll add personal, right? But for the most part, they know that I have a job, and I'm part of fulfilling a mission, and the mission is, how do we impact lives through philanthropy? And that's what I'm there for, first and foremost."
Participant M13

In these examples, participants described their typical behaviour, although they also

acknowledged that if they sensed the donor wanted them to share more and they felt comfortable

doing so, they would. Thus, for these participants, there is a tension between their normal habits

and their desire to meet the donors' needs. Altman et al.'s (1981) research on self-disclosure

describes dialectical or opposing forces that relationship partners must keep in balance during the

relationship development process. For example, partners must balance the need to be open, so

the other person feels comfortable with the need to be closed to protect privacy (Derlega et al.,

2008). Participants in the current research describe dealing with similar tensions in their

relationships with major donors.

Participants described having clear, though unstated, boundaries about what they would and

would not discuss with donors. For example, one participant described that she would not talk

about donors' children unless they brought up the subject because she did not want to have to

explain why she does not have children herself. Fundraisers who were less comfortable self-

disclosing with donors described keeping the content of their disclosures surface-level. They

would share information, for example, about their past work experience, what they did over the

252

weekend, where they went on a recent vacation, but would not go into great detail or share any

information about their feelings, values or emotions. These participants expressed worry about

oversharing and wanted to maintain a level of professionalism in the interaction and keep the

focus on the donor. When they did share, these participants described responding to the donor's

questions out of politeness and a sense that a response was expected. These fundraisers quickly

brought the conversation back either to the donor or the institution.

Three of the 20 participants (F03, F05 and M15) described themselves as being more guarded

with self-disclosure than 'typical' major gift fundraisers. The researcher used probing questions

to determine that unlike the other participants, the more reserved fundraisers assumed that most

donors do not want to know them personally, as Participant M15 described:

"Yeah, I'll tell you, I have found, at least in my experience, that (donors wanting to know the
fundraiser personally) happens so seldom."
Participant M15

These participants – and others who decided to withhold information because of their personal or

situational preferences, comfort level or because of their assumptions about donors – described

relying more heavily on the stories of students and university leadership, as opposed to their

personal stories, to help build relationships with donors. For example, Participant M12 described

how his past experience as an admissions representative shaped the content he shared with

donors:

"But I will say that, having 35 years of stories of prospective students and students that ended up enrolling, or students and stories of those that ended up not enrolling for particular reasons, I can I roll those into my conversations just like you know it's like it's a part of my whole conversation."
Participant M12

Another example:

"So, in that instance I don't know that I would talk about myself as much as the young woman (a student) who took me on an admissions tour, and told me about the four jobs that she has, including one is being at home by the time that her siblings get off the school bus because her mom is working… So she has to, you know, like… woah! like completely different scope. Instead of me, like, Oh, yeah, I had a summer job, and… (laughs) Just very different."
Participant F07

Using student stories, rather than their own stories, helped participants create connections with donors and demonstrate the importance of the mission of their institutions. Thus, participants used stories to develop donor relationships while also being able to stay true to their own preferences and personal boundaries.

Theme 2: Content delivery

This section introduces Theme 2, Content Delivery. This theme also helps explain the how participants used their disclosure content in their interactions with major donors, thus disclosure *content* is the area of interest for the current theme. Two subthemes were identified that help provide additional detail and explanation of the theme.

Not surprisingly, all 20 participants described disclosing spontaneously with donors. This occurred when donors asked participants direct questions about themselves or when the donor brought up a topic of common interest during conversation. More interesting was that most participants also discussed mapping out or planning what information they might disclose with donors ahead of their interactions. Thus, participants' disclosure content was both spontaneous and planned.

Table 4.30 reminds the reader of the area of interest, theme and subthemes that will be discussed in this section, as well as the frequency at which each occurred.

Table 4.30: Theme 2 and subtheme frequencies

Area of interest	Themes and Subthemes	Frequency
Disclosure content	Theme 2: Content delivery	20
	• Subtheme 2a: Spontaneous disclosures	19
	• Subtheme 2b: Planned disclosures	18

In this section, Theme 2 was introduced. The subthemes discussed next provide more detail and additional examples to describe Theme 2.

Subtheme 2a: Spontaneous disclosures

This section describes a subtheme related to participants' spontaneous disclosures and helps explain how participants used disclosure content in their relationships with major donors. All 20 participants described disclosing spontaneously with donors. These disclosures occur as part of the norms of interacting socially with another person, which ties back to social exchange theory

and says that relationships have certain norms of exchange (Emerson, 1976) which must be

followed in order for the relationship to thrive. Reciprocity, which involves individuals taking

turns sharing information in a back-and-forth nature during their interactions (Greene et al.,

2006) has been identified as an important norm in social relationships and explains why there

was consensus among all participants that they spontaneously share personal information with

donors.

Examples:

"I think in most cases, it (disclosing) is very spontaneous. Now if somebody's sharing their stories with me, you know I might be listening and then think, Oh, I bet we know the same person, or you know I might come back and share with them that if they mention you know a list of their teammates, for example, or classmates, and I know some of those, and I worked with them yeah, I may bring that you know, bring that up in response to get you know later on in the conversation."
Participant M16

"But there are certainly things that come up organically, especially as it pertains to you know news and what's going on in the world, or what's going on at the UNIVERSITY."
Participant F24

Conversation partners facilitate reciprocation when they ask each other questions, and this was a

common way that all fundraisers, even those who were more hesitant to share personal

information, ended up disclosing.

"I have donors that would just come flat out and ask me (questions about myself). Yeah, it's like that one donor (who says) 'tell me about your family'. 'Tell me how, you know, tell me how you are...' Okay, I don't have a problem sharing that."
Participant M10

Other participants described how they disclosed spontaneously when the conversation turned to a

shared experience or similarity between the participant and donor. For example:

*"It is when that person (a donor) says something that I'm like, 'Oh! (I can relate to that.)' I'll
just tack on a (story about myself) to the conversation."*
Participant F20

*"Oh, I'd like to think there's strategy and thought behind it. But I, no, I think it's more
spontaneous. If we're going down a path, and somebody says something about you know, well, I
had breast cancer last year. You know, my mom had breast cancer. I've been there. I feel for you.
How are you? I would spontaneously share that I've had that experience as well. I understand,
you know, I come from a point of understanding that."*
Participant F18

Finding commonalities with conversation partners is a form of social bonding and has been

documented in social psychology (Boer et al., 2011) and marketing (Schakett et al., 2011)

research. In addition, these disclosures allow the fundraiser to demonstrate empathy and identify

with the donor on a personal level.

Subtheme 2b: Planned disclosures

The next subtheme describes a more surprising finding, that some participants planned what

content they disclosed to donors before interacting with them. Investing time, effort, and energy

into thinking about what information they will disclose with donors ahead of time indicates that

participants recognise the value and utility of their personal stories in connecting with donors.

A majority of participants (14 of 20) described that they planned their disclosures. It is a

common practice in major gift fundraising that fundraisers will research donors prior to

interacting with them, for example, they may review public records (i.e., property records,

marriage licenses), newspaper articles, or notes from past interactions the donor had with other

fundraising staff members. Participants in this study described using that research to make links

to their own background, interests, and again, points of commonality with the donor and

deliberately planning what content they may end up disclosing during an interaction with a major

donor. One participant, M09, described coming up with a list of potential disclosures to share

with a particular donor prior to their meeting:

"*I have categories in my head of things I want to… I can touch on that. I have relatable stories to share. So, going to UNIVERSITY when I knew he went there I'm like I, and at the time I think I was getting my MBA at UNIVERSITY. So, I kind of like, oh, kind of bring that in… you know, some of his classmates at UNIVERSITY, you know, I knew. So, bring, you know… make sure I can kind of can, again, connect that relationship building.*"
Participant M09

However, as Participant F07 describes, this tactic is usually, but not always, effective.

"*I mentioned DONOR, she was the Wall Street banker. I grew up in the same part of the world where she lived, and I thought for sure that's gonna be my in. You know we could talk about taking the train from CITY to CITY, and you know how my dad worked in banking. And you know all these different commonalities that I thought… but she didn't care. That wasn't important to her at all. If I had gone to the prep school where she went to, that would have made a difference.*
Participant F07

Participants emphasised that planning the content of their disclosures was not done to trick

donors or be manipulative, but to share purposeful, meaningful information that would help

establish or grow a connection. Participants described searching for or finding common points of

genuine interest and seemed to indicate that planning their disclosures was an indicator of

professional excellence rather than a cunning plot. Planned disclosures helped the fundraisers

feel prepared and more thoughtful during their interactions with donors.

One participant, F24, described how the fundraising team at her university practices their donor

disclosures with one another during weekly role-playing exercises. Team members are given a

scenario and one person plays the donor and the other plays the fundraiser, for example, the

participant describes a role-playing scenario in which the fundraiser had to introduce herself to a

donor who has been avoiding her:

"So, my other team members will be like (giving her feedback), okay, PARTICIPANT, like you forgot to mention that your dad was in the military. Like he worked there for 35 years. People wanna hear that, or the way that you talked about you know ORG (where she worked in the past) was really great, but you skipped over like this one thing that people, you know, would love to hear, so talk about that."
Participant F24

Although only one participant mentioned role-playing in the interviews, it is flagged here as a

potential training strategy for fundraising professionals. This participant described how role-

playing helped fundraisers who were less comfortable disclosing figure out how to frame their

personal stories in a way that felt natural and would meet donors' needs to get to know them as a

"real human".

Theme 3: Relational Benefits

This section introduces Theme 3, relational benefits. Theme 3 and Theme 4 help explain how participants perceive the impact of their self-disclosure on their relationships with donors. Thus, *impact* is the area of interest.

Table 4.31: Theme 3 and subtheme frequencies

Area of interest	Themes and Subthemes	Frequency
Impact	Theme 3: Relational Benefits	20
	• Subtheme 3a: Disclosures build trust and credibility	19
	• Subtheme 3b: Disclosures strengthen donor relationships	18

All 20 participants described donors reacting neutrally at worst and extremely positively at best after receiving a fundraisers' disclosure. The following excerpt provides an example of how participants described donors' reactions:

"I would say that it (the participant's disclosure) was received sympathetically, sometimes empathetically, sometimes clearly, deeply… I've never had anybody rebuff it."
Participant F27

Thus, participants perceived their disclosures helped advance (for example, by creating polite, engaging conversation) or strengthen (for example, by meeting the donors' perceived needs to connect personally) their relationships with donors. Two subthemes are described next, which help provide additional detail and describe how participants perceived their self-disclosures provide relational benefits to donors.

Subtheme 3a: Disclosure builds trust and credibility

This subtheme, disclosure builds trust and credibility, was the most prevalent response within the data set (all interviews combined). Participants described trust as a belief in the reliability, truth, ability and strength in the other (Merriam Webster, 1999) and credibility as the quality of being trusted or believed in (Merriam Webster, 1999), which participants typically discussed in a professional sense.

Eighteen of the 20 participants organically (i.e., they were not asked directly by the researcher) described how their self-disclosures built trust and credibility among donors. Frequency within this subtheme was also exceptional, with 76 related excerpts coded. In B2B marketing relationships (Cuevas et al., 2015), personal relationships (Dunn & Schweitzer, 2005) and even fundraising relationships (Sargeant & Lee, 2004), trust has been found to drive giving behaviours.

Trust is most often studied in a fundraising context in organisation-to-donor communications (i.e., direct mail appeals, annual reports), and recent research indicates that this type of communication, when done well, builds donors' trust (Edworthy et al., 2022). The current research is the first known to investigate how fundraiser-to-donor communication of interpersonal (rather than organizational) information builds trust. Examples of participants who expressed the connection between their self-disclosure and trust are provided below:

"I think some of them, you know, they believe in the bigger institution, but I think a lot of that has to do with trust and just, you know, (the donor feeling like the fundraiser is) being a good steward of, you know, my feelings, my money, my thoughts, my beliefs, and this person (the fundraiser) is my conduit to helping me change whatever it is that I want to change in the world. So, I think you (the donors) kind of want to understand who they (fundraisers) are to make sure you trust them. And then you just you feel better about writing the check."
Participant F03

"It (self-disclosure) creates a level of trust, and when you are… We are first and foremost fiduciaries. So, our responsibility is to the donors and the funds. Because what we ask for is usually in perpetuity and we have to be able to show that we're worthy of their trust in perpetuity. And if they view me as a used car salesman, it will be a transaction. It will be a onetime gift. They will always kind of wonder if they made the right decision, and that's not how someone should feel when they make a large gift that's meaningful to them. They should feel like they entrusted the right person, they entrusted the right organisation and we're going to be responsible with their money. If they don't trust me -- because they give to people first --if they don't trust me, we never establish that relationship where they believe that the university will do what they have asked them to do."
Participant F08

The researcher asked probing questions to more fully understand how participants believe that trust is built through self-disclosure. First, participants described that disclosures build trust by helping to 'humanise' the fundraiser. The practitioner literature encourages fundraisers to see donors as more than just their money (Hartsook & Sargeant, 2010). The current research indicates that it is also important for fundraisers to be seen as more than just their jobs. As the excerpts below describe, participants perceive that their self-disclosure makes them more appealing to donors.

Examples:

"In part, you do it (share personal stories) again so that can get your name ahead of the institution's. So, you know, (the donor thinks) 'I'm meeting with PARTICIPANT, from the

UNIVERSITY' as opposed to 'I'm meeting with someone from UNIVERSITY, I think his name's PARTICIPANT something... some guy'."
Participant M15

"I share my values, and I you know I share my, you know, my opinions in in some regard. Because I, because I think it shows that you're a person, and that you have a heart, and that you believe in something, you know, beyond just, you know, kind of the classic box of fundraising, right? Like, you also have hopes and dreams and thoughts and ideas."
Participant F03

Additionally, participants build trust and credibility with donors by demonstrating that they are

good professionals, and good people. Participants described sharing stories about their

professional background, as well as stories that are intended to demonstrate to the donors that

they are good parents, for example, or have a strong connection to the mission of the universities

they serve. Participants feel they must prove themselves on both a personal and professional

level. For example:

"So, one thing that most of our alumni wanna know is like, how are we connected to the UNIVERSITY or the community. And my dad was a (CONFIDENTIAL) for 30 years. So that is something that like I will regularly share, especially with new donors. Just because it helps to build that (professional) credibility. But I also, you know, talk about my husband and my dog, and we live in CITY..."
Participant F24

"Don't come across and say this guy's trying to pry money from me. He's doing his job, but he's also real."
Participant M13

"And so, part of it is just you know building trust that I'm genuine. I'm not just somebody from the outside that came in for a job, and I'm just trying to do my best to get money from them. I think that trust comes from like the shared experiences you know that I'm a UNIVERSITY alum,

know a lot of the same people, and then that transitions that into an alignment with you know why I'm generally passionate about being here at UNIVERSITY and do what I do.
Participant M16

These disclosures helped build trust by creating a sense of shared identity and genuine connectedness between donors and fundraisers. Individuals who have shared identities tend to feel as though they are part of the same group – the in-group – and donors may be more willing to sacrifice to meet the needs of in-group (versus out-group) members (Edworthy et al., 2022). Studies have shown that donors who share identities with the non-profit organisations they support give more as a result (Edworthy et al., 2022).

At the very least, participants' disclosures help bring to the surface points of common interest between the two, which helped facilitate bonding and future conversations. Participants built trust and credibility by indicating they were willing to be open and scrutinised, and help donors feel more comfortable by reducing uncertainty, which is a key strategy in the relationship development process (Greene et al., 2006). For example:

"Yeah, it makes the relationship easier. It builds trust. Yeah, if you're more like them."
Participant F05

"My portfolio was heavy with former athletes here at UNIVERSITY, which… I was a former athlete myself. So, I think there's just lots of times that we're sharing stories. I think that's one strategy I use a lot you know when I am speaking with former athletes, especially when I first got here. It was kind of letting them know that I was part of the quote unquote circle. You know, just to build that trust and let them know that same time, you know I know what I'm doing."
Participant M16

"I hope it helps. I hope it provides an area where people can see themselves in me."
Participant F25

"I mean it's that… not everybody fly fishes, and so you kinda… it's kind of a niche group that does. And we all like to talk about our trips and our fish stories, you know, and one of the ones that got away, and all that stuff, and it's just fun to talk about it. And when you are a fly fisherman you feel part of this club, and you'll always have that you'll always have that."
Participant M10

Subtheme 3b: Disclosure strengthens donor relationships

Aligned with findings from the social psychology (Greene et al., 2006) and marketing (Haytko, 2004) literature, participants in the current research described that self-disclosure helped build and strengthen their relationship with donors to varying degrees. In the early stages of the relationship, self-disclosure facilitated conversational ease and helped participants meet the norms of interacting socially with another person, which echoes findings from social penetration theory (Altman & Taylor, 1973). For example:

"I mean, regardless of what the what the context may be. I mean, you know, in the end if you're just sitting with somebody else, and it's two people talking, the conventions of humanity come into play as they would, you know, in any in any context."
Participant M15

Sometimes, participants sensed that the donor wanted to know them personally or create a personal connection. Participants described how they disclosed to meet the perceived needs of the donor. The excerpts included below show that participants sensed that, for some donors, self-disclosure was a requirement of the relationship, and that they must be willing to disclose, or the relationship would suffer.

265

Examples:

"I felt like he was just waiting for me to share something, and I definitely had the feeling that if I didn't that this relationship was going nowhere. I could have had 20 more meetings with him (donor), and we could have had 20 more, you know, very pleasant conversations, but he would not have done anything."
Participant F09

"But for whatever reason, when we were talking about this, you know, he just kept looking at me, and like, I could sense that he was… He was trying to understand who I was, a little bit, too, and because it was our first meeting, he probably didn't have any sense of you know of a background. And you know we're talking about where we grew up, and families, and you know."
Participant F03

"I trusted him. Because there was just that… he sincerely wanted to know. It wasn't, you know, I'm asking you this…just because it's the right thing to do. He wanted to know that information. And it, we had never met before. So that gave him a very different view of me by me participating in that with him than it would if I had fought that and if I hadn't."
Participant F08

These examples indicate that some donors sought to create a sense of connectedness (Edworthy et al., 2022) with fundraisers, or at least that was participants' perception. Connectedness, defined as an individual's desire to create warm, satisfying and loving relationships with others (Edworthy et al., 2022), is one of three fundamental human needs that help create a sense of psychological well-being in people (Ryan & Deci, 2000). The others are autonomy and competence (Ryan & Deci, 2000). Individuals experience improved mental health and well-being when they feel connected to others (Ryan & Deci, 2000). Some recent fundraising research has investigated donors' feelings of connectedness with the non-profit organisations they support (Edworthy et al., 2022). Findings from these studies show that changing a single sentence in a

266

direct mail piece to emphasise feelings of connectedness with the non-profit organisation led to

significant increases in donors' giving and donors' psychological well-being, thus suggesting

that fundraisers may be able to meet donors' fundamental human need to connect with others

during their interactions (Edworthy et al., 2022).

Participants also described a feeling of increased closeness after disclosing with a donor; a

feeling that both the fundraiser and donor were able to 'let down their guard' and interact in a

way that was familiar and genuine.

"But then fast forward a few years (after she disclosed a personal story about having a miscarriage), and I'm working with them again at their 55th (reunion)…there was a context. They knew me at that point in time, but I didn't have to keep telling them my story, because they already knew me. But it also gave me some points with them or their spouses like Oh, PARTICIPANT's had this life experience that I've had. So, it's something similar. It's something that kind of can bond you in some kind of way."
Participant F07

"And that's almost more fun (when you're sharing stories with donors) because it's not deliberate and feels more authentic. It is more authentic, right, you know, and I feel like with donors I can have a fairly expressive face. And so, you know, I can feel myself going (making a surprised face), 'Oh, my goodness!', you know… 'Let me tell you about such and such because you know I do that, too, or I've had that same experience!'.
Participant F05

Participants described how their disclosures helped resolve conflicts and challenges with donors.

This echoes findings from the marketing literature which finds that close, personal relationships

between buyers and sellers helps decrease conflict (Haytko, 2004). The openness of the

relationship achieved during moments of shared disclosures helps the pair have 'hard

conversations', exemplified by the excerpts below:

267

"But I also think that when things aren't going right is if they feel like they can, you know, they can have that conversation with you, they can share with you something that they're not happy about, or they're dissatisfied about that, because you have this, these other layers to your conversations with them, and you're evolving in your relationship. They're willing to also come and say, like, I'm really not happy with how this is being handled, right? I have some questions I'd really like to understand this more and that that's important, too, is that they will feel comfortable coming to me and saying, I would prefer this, or I, I wish this would happen, or I was really expecting this."
Participant F11

"(After the fundraiser discloses), hopefully then they (donors) have the freedom to come and visit with you about concerns they have about the college, and then they know you'll be honest with them about what's happening."
Participant M14

Fundraisers in this phase also described how their disclosures strengthened the donor's

relationship with the university. They describe how, because fundraisers are representations of

the university, positive feelings about the fundraiser lead to positive feelings about the

university. For example:

"Yes, I do. So, yeah, I think I if I'm building that relationship with them, and they enjoy that relationship, then yeah, I think they would think favourably of the University."
Participant M10

"I think in general, the more vulnerable you can be and the more you share, the stronger relationship to an institution, yeah."
Participant M17

Taken together, these excerpts demonstrate how participants' relationships with donors, and

donors' relationships with the institutions are strengthened because of self-disclosures.

Theme 4: Links to Giving

This section introduces Theme 4, Links to Giving. Like Theme 3, this theme also helped explain

how participants perceived their self-disclosure impacted their relationships with donors. Thus,

impact is the area of interest.

Table 4.32: Theme 4 and subtheme frequencies

Area of interest	Themes and Subthemes	Frequency
Impact	Theme 4: Links to Giving	14
	• Subtheme 4a: Disclosures lead to donor behaviour changes	14
	• Subtheme 4b: Disclosures improve donors' giving experience	13

This theme relates to the dependent variable (donors' giving intention) in the Phase 1

quantitative research and helped describe how fundraisers' disclosures influence donors' giving

behaviours and decisions. Fourteen of 20 participants described how their disclosures helped

facilitate donors' giving. Of those, a few participants described a direct link between their

disclosures and giving, as this exchange between the researcher and Participant M04

exemplifies:

Participant M04: *"That's the dynamic of fundraising. Ask anyone who gives money, and they will tell you that a large part of it had to do with how they felt about the person asking them for money."*
Researcher: "*Interesting. So, you think there's a direct link (between self-disclosure and giving)?"*
Participant M04: *"100%."*

Most other participants described the link between their self-disclosure and donors' giving as being more indirect. Participants describe how disclosures 'set the stage' for the relationship and inspire donors to interact with fundraisers in a meaningful way. For example:

Researcher*: "Why do you think fundraisers share their personal stories with donors?"*
Participant F08*: "Because it works!" (Laughs)*
Researcher*: (Laughs) "Well, tell me more! Works in what way?"*
Participant F08*: "It allows you to make a connection with a person which will more often lead to a donation which leads to a relationship with that person, which allows that person to make sometimes a more significant impact than they would think that they would otherwise be able to make."*

"I think (self-disclosure helps with) getting people super invested. I think it helps when people see themselves as a part of the story. So sometimes you telling your version, your take on it, your personal story, your personal narrative, it brings people in a way, because they have somebody can bounce ideas off of. They have somebody they can ask questions of, you know, I'm a phone call away. I'm a text away."
Participant F25

"And so yeah, so we can talk all day about numbers and numbers are great, and there are some donors, and numbers are very important to them. But I think when it comes down to the decision of whether to give a significant gift or not, to do sacrificial giving, I think it's gotta be personal, you know, on some level."
Participant M22

To explain the connection between disclosure and giving, a few participants described how self-disclosing can be a tactic to differentiate themselves and their universities from other causes a donor might want to support, thus increasing the likelihood the donor will give, as exemplified in the excerpts below:

"So, what makes computer science at UNIVERSITY for our donors different than at their alma mater and schools around them? Why do we care? And so, when I can add that personal touch

to, whether it is me personally, or students' personal story, faculty members' personal story, whatever it is that connection, and that that genuine, I don't know, feelings, I think come through and I think that's what kind of clinches it for us, often."
Participant M22

"There are many fundraisers who are doing the same thing. And so, if you can say I'm either a product of this or I had a similar background to this. I understand why this is important, that authenticity comes through a little bit more."
Participant F25

So far, this section has introduced how participants link their self-disclosure to donors' giving.

Next, two additional subthemes are described which provide additional detail and information

about this theme.

Subtheme 4a: Disclosure leads to behaviour changes

According to most participants (14 of 20), their disclosures led to changes in donors' behaviours,

which impacted donors' giving. For example, participants described that donors were more likely

to share information after the fundraiser disclosed. This algins with the concept of reciprocity

which has been widely studied in the self-disclosure literature (Greene et al., 2006), and is a

tactic that participants used to encourage donors to share more about themselves. The following

quotes are illustrative of this:

"I'm willing to open up and share common ground right away because I feel like it gives them ground to be even more open. That's, you know, I've been doing it for over 10 years, almost 16. That's how I... it's not backfired on me yet"
Participant F20

"Often when we go into these conversations (where both the participant and donor are sharing personal stories), it just naturally leads into them providing a lot of the information that's getting

271

to the crux of why they care about what we do and how they wanna be a part of it. So, I just feel that's the way I have to do it. If I had to do it any other way, I don't know if I could, just to be honest."
Participant M22

Even when donors share seemingly innocuous information about themselves, fundraisers pick up on clues that help them understand the donor's capacity to make a major gift (i.e., donors talk about wealth indicators like owning a vacation home or traveling by private jet) or interests (i.e., donors talk about how important their communications courses were in starting their company). Thus, participants' disclosures lead to donors' disclosures, which helped participants understand and cultivate donors and craft a compelling solicitation.

Participants also described how donors became more responsive after they disclosed. Donors were more likely to pick up the phone, answer an email, and take a meeting with participants. Several participants described how disclosing helped 'speed up' the cultivation or solicitation process because donors were simply eager to interact again. In this way, as the excerpts below describe, participants perceived their self-disclosures influenced donors' behaviours (answering the phone), which in turn influence donors' giving decisions.

Examples:

"It goes back to the trust and if someone trusts what you're delivering then they are more likely to pick up the phone to hear information from you, and if you've shared a little bit, they probably like you, too, right? And so they just may pick up the phone cause they wanna… it's nice to hear from you, but they also trust you that you're not just calling (to waste their time)…"
Participant F20

Researcher*: "So what did what did your donor say or do after you were vulnerable (by sharing a personal story) with the donor?"*
Participant F08*: "He immediately wanted to have another meeting, to talk scholarship. He wanted to go home and talk to his wife and talk about, was this a good idea for them right now? And you know we got back in touch and worked on a gift agreement, and then that just kind of was born from that conversation."*

"I mean, I like to think so (that disclosure is linked to giving). Certainly, I've definitely had donors that after, you know, probably months of conversations they're like, 'all right, PARTICIPANT, you just tell me where to give. I love the institution, but now I trust you. So, like, where are the dollars needed?' You know? Those are, I mean, that's a great feeling, right?
Participant F24

Subtheme 4b: Disclosure improves donors' giving experience

The previous subtheme described how donors' behaviours changed because of participants' disclosures and helped facilitate donors' giving. In this subtheme, participants (13 of 20) described how their disclosures affected the way donors felt, which in turn impacted donors' giving experience. Participants perceived that their disclosures improved some donors' giving experience and led to more frequent and pleasurable conversations, and relaxed, natural opportunities for interaction. According to these participants, their disclosure helped deepen the relationship over time (Altman & Taylor, 1973). For example:

"We earned that with one another, by sharing tidbits of information back and forth, and that information never leaving the two of us. And so that just continued to build the bond, and it seems inconsequential, but we ran in the same circle of people at the university. So, if I told her something, and it came back around to me, I would have known, and vice versa for her. And so, like, that was… I completely trust her. But that was earned for both of us over time, cause she's just like… she doesn't trust people as easy either. So that… she was a tough nut to crack. But once we developed that relationship man, it was spectacular."
Participant F08

"It's just that that engagement in common, camaraderie and just having that those things in common and just staying in touch. And after a while you just build a friendship with these donors. It's professional friendship but you still get to know them. You get to know their kids. You know everything about their lives. And so, I think just creating that, reaching out, communicating constantly calling, you know, staying in touch and things like that. That's how I do it."
Participant M10

"I think when you're first getting to know somebody, it's easy to hide behind the 'I wear a pin on my shoulder that says that I represent this place, and that is all I want to talk to you about'. But you know, if you build up relationships with folks you know, at UNIVERSITY I'd known some of those donors for 8, 9 years. By the time I had left, they were friends."
Participant F25

Mutual disclosures helped to create a sense of partnership or a feeling of 'we are in this together'

between participants and donors (Shaker & Nelson, 2021). Participants' disclosures helped

communicate their willingness to help donors make a big impact and change the world.

Participants described that their disclosures helped produce an environment that led to a

significant personal transformation for donors.

Examples:

"There's a moment that always happens with philanthropy when it turns from an "I" to a "we" or "you" to a "we". And with that, I live for that, you know that that means the donor is invested."
Participant F25

"I think that he probably appreciated me sharing with him, and getting to know me a little bit more, because, you know, I was an agent for him, so to speak. You know, there's certain things that money can accomplish, but one of them that can't accomplish is changing, I mean going in and changing lives through education and so he that's kind of what he's buying. I served him in a way that to do good, to help him do good with his hard-earned money, and regardless of who you work with you wanna have some level of trust and use that word again, and rapport with them. I think it's pretty natural to want that."
Participant M13

"Oh, I mean, I think any friendship – and I do count a lot of these folks as friends— I mean, you know, we do share, you know, things that happen. Like, I'll get an email, and they'll say, yeah, my grandson did this or that and I'm like how cool is that that they thought that PARTICIPANT would like to know this, or we've talked about it, and they know that I that I know about that. And so, to me that that gives me a sense of I'm really connecting, and I'm really making a difference. And that UNIVERSITY, as an institution, is better off having them because of our relationship."
Participant M22

As indicated by several excerpts included in this section, participants described how their relationships with – not all – but some donors evolved into friendships, and they attributed the change in their relationship status to the mutual exchange of self-disclosure. Like past fundraising (Shaker & Nelson, 2021) and marketing (Haytko, 2004) research shows, these professional relationships sometimes become true friendships. Participants described that disclosures about commonalities and shared experiences gave them an opportunity to recognise what was special about the donor and validated the donor's lived experience, which deepened their relationship. Their disclosures served as a signal that communicated the status of the

relationship, which indicated the relationship was about more than just money, but rather signalled a genuine connection.

Examples:

"I mean, I think it creates an authenticity. And it's just that, you know, I think donors like to think that they are in relationship with an organisation. And so, when you when you create that human connection, I mean that real human connection, it reinforces that."
Participant F27

"All of us like to have validation that we're not just throwing our money away, or our time or our feelings. You know, it's not just the monetary here that we're engaging with. It is personal. I mean, there's no way that somebody's gonna write a check for $1 million dollars or more and it can't feel good, right? It's got to help them feel good, too."
Participant M12

"You feel a connection to the person (the donor) and an appreciation… at least I do. I feel an appreciation for what they have done, the good that they have done, and I want to share with them that I have a personal appreciation for that. And it just confirms, based on our shared experience that their choices are the right choices, and that it makes a difference."
Participant F08

During the interviews, many participants described that when they were able to achieve mutuality in their relationships with donors, when both the donor and fundraiser are able to share back-and-forth, it was a professional 'ideal', increasing their job satisfaction and feelings of professional competence, which may further enhance donors' giving experience.

276

"The rewards are you probably get more money, the more you connect with somebody on some level, whether it be professional, and or personal. But it just makes life more enjoyable, right? Because you gotta raise money. So hopefully, you'll actually respect and admire and trust somebody that you're working with, a donor. So that's a reward, not only probably are you're gonna raise more money and achieve your mission, whatever that may be, for the particular university, but also it makes the job more enjoyable."
Participant M13

"The way we sort of look at it is in a very like familial sense. So, it's like you are like adding

somebody to the family and the community. And if we can, you know, the more people we bring into the fold the better, because ultimately that means that they're supporting the institution."
Participant F24

"You sit down, you have a two and a half hour meeting you look at your watch you go, 'Oh, my God! It's an hour and a half later than I thought it was, right?' I mean, you're really getting it done at that point with somebody, because you're enjoying their company, they're enjoying your company, you know, you've got your list of business items that you were planning on getting done when you when you came in. You're able to get those done and you have a good time."
Participant M15

The excerpts in this theme demonstrate how participants disclosures allow them to act more

authentically with donors, which is touted by the practitioner literature (Hartsook & Sargeant,

2010) as being critical to fundraisers' success. The next set of excerpts describe how participants

use their self-disclosure to signal to donors that they are genuinely interested in knowing donors

as individuals with unique needs.

Examples:

"So, when I talk to you (a donor), and learn something about you, how can I bring that back? How can I bring that back to me? How can I bring that back to the work organisation? Maybe it's both. Maybe it's just the organisation you know… and I do think that there's an art of that conversation like I was mentioning that… I think if you're genuine and authentic with donors

you're gonna be more successful. If I try to be somebody that I'm not, folks are gonna see through it."
Participant F07

"I never tried to be sales-y or I just try to, I try to be like to donors like I am to my parents, like I am to my friends, like I am to anybody that's in my life, and not just because it's work, I act a different way. I have conversations with donors the way I have conversations with some of my best friends."
Participant M13

"I think the donors appreciate it (the self-disclosure). I think they appreciate the honesty. I think they I appreciate the fact that that I'm willing to share that kind of a story with them and share it…I mean I it's genuine and I think people recognise that. There are times depending on setting where it gets really emotional for me."
Participant M14

Participants described that their authentic self-disclosures helped them build strong, genuine connections with donors that often led to donors making larger gifts than would otherwise be possible.

Theme 5: Rewards and risks for female fundraisers

The final theme, Theme 5, and subthemes help explain how *gender differences* play a role in participants self-disclosure. In this discussion, the term gender is used to mean gender identity, or an individual's personal sense of having a particular gender. Eleven of the 20 participants indicated that male and female-identifying fundraisers share similar personal stories at similar times in similar ways with donors. These participants were either emphatic that there are no gender differences or noncommittal (i.e., they felt as though there were not differences but could not explain why). These participants, the majority, described that all fundraisers – both male and

female – possess characteristics that help them be successful and interact comfortably with donors. Thus, as the examples below describe, fundraisers' personalities, rather than their gender, influences their self-disclosure with donors.

Examples:

"No, (there are not gender differences in the way male and female fundraisers self-disclose) because the male and female colleagues that I know that are drawn to this work and are good with this work, it's because they're good at that. You know, it's a core competency."
Participant F27

"I don't think it's necessarily male or female. I think it's just personality. Like, I came from UNIVERSITY, and there was a female fundraiser who was tough and kind of like, a little pushy. And that was her personality, and I don't think I look at it as a male or female. I just look that's her personality and I've seen that in men… and so I don't necessarily put it in that that bucket if it's male/female."
Participant M09

Fewer participants (nine) described that gender differences do exist in the ways that male and female-identifying fundraisers self-disclose. However, as Braun and Clark (2006) indicate, researcher judgment should be used to identify a theme rather than relying solely on prevalence. When patterned responses capture important information related to the research question, as in this instance, it is acceptable to identify those responses as a theme (Braun & Clarke, 2006). In the current research, gender differences of any type were important to consider because the fundraising profession is dominated by women (Breeze, 2017) and some small differences in how women disclose have been discovered in the self-disclosure research (Dindia & Allen, 1992). As Table 4.33 indicates, participants described that there are both rewards and risks for female-identifying fundraisers. The area of interest for the current theme was gender differences and the two subthemes help describe theme 5 in more detail.

Table 4.33: Theme 5 and subtheme frequencies

Area of interest	Themes and Subthemes	Frequency
Gender differences	Theme 5: Rewards and risks for female fundraisers	9
	• Subtheme 5a: Femininity as an advantage	9
	• Subtheme 5b: Disclosure dangers for female fundraisers	8

In this section so far, Theme 5 has been introduced. Next, a discussion of each subtheme is included to provide additional information and detail about the theme and describe the specific rewards and risks for female fundraisers.

Subtheme 5a: Femininity as an advantage

Both male and female-identifying participants (9 of 20) described how female fundraisers have certain advantages when disclosing to donors. These participants identified female fundraisers as being more likely to share, especially about emotional topics, and better able to convey empathy through their disclosures. For example:

"I feel like women can do a little bit more of the touchy-feely kind of thing. And I've been successful in those spaces, too."
Participant F07

"I mean maybe that's why there's more female fundraisers because they're just better at it. Because you do have to, like, pull at the heart strings a little bit sometimes."
Participant M17

"I think instinctually women rely more on feelings at first, and then we go to facts, and I think that for some people that works very well."
Participant F08

An excerpt from participant M04, a male fundraiser, captures the prevalent notion among

interviewees that these gender differences may be a result of differences in the way men and

women are socialised and broader gender expectations:

"I see, like, some of my male counterparts have to try a little harder to pour out these authentic stories because you get made fun of for doing that. You know, you're going on the golf course, and if I shared these stories on the golf course… (shakes his head no). So, then you don't get the feedback, you know. I was on the golf course last night and they don't want to (hear my story). So, we (men) get made fun of pretty hard for opening up. But with a group of females, if I share stories like that, or I, I grew up with four sisters…so I've always been around females, but it's just it's different. I think there is a certain amount of gift in femininity."
Participant M04

Other examples:

"Your world views are different. I mean, there's some things that will be similar, but the vast majority, like, the way you move through the world, and the way, people react to you is the way that you're gonna present yourself. So yeah, I think there are very stark differences there."
Participant F25

"It goes from individual to individual, that they're probably based on all of our experiences. And so, yeah, I think that probably female versus male based on the things that I've dealt with as a male, and others have dealt with as females, I think that probably does play into play into the conversation. I just don't know to what degree."
Participant M13

Because of the 'natural gifts' that come with being female, participants described that female

fundraisers may feel more comfortable sharing with donors, may be more aware of when to share

a personal story or hold back, and more likely to make connections to donors. These responses

echo Breeze's (2017) findings that fundraisers in general have higher emotional intelligence than

the general public.

Another advantage identified was related to female fundraisers' ability to engage with donors on stereotypically female topics like shoes, clothes and jewelry. For example:

*"I was watching one of my colleagues just the other day, and I'm talking to this donor -- this is a donor that I had found years ago on a discovery list. And I'm talking to her about her profession, and how retirement is, and then this colleague walks up, and the donor said '*Oh, my gosh, I love those earrings! They match your dress perfectly! Where did you get them?!' You know, and it's like all of a sudden…(snaps) 'I love yours, too', you know…. there's this this back and forth. I was like… hmmmm… that's interesting!"*
Participant M10

Participants described how surface-level disclosures like the one mentioned above about earrings can spark a connection between two people and help the fundraiser advance the conversation toward building a relationship with the donor and eventually asking for a gift.

Subtheme 5b: Disclosure dangers for female fundraisers

Along with the advantages described by participants in Subtheme 5a, several (8 of 20) mentioned that female-identifying fundraisers encounter risks related to their self-disclosures that their male-identifying counterparts do not. For example, female participants described their own experiences of feeling pressured to disclose because of (in these cases) male donors asking direct, invasive questions about their personal lives, dating status, interest in romantic partners. Male participants described hearing stories of female colleagues who faced similar circumstances.

282

Examples:

"So, a couple of female fundraisers here have had experiences with donors, where they (donors) have wanted them to go out for drinks with them (female fundraisers) – huge no no. Alone – which is an even bigger no no. They have wanted them to come to their home alone. Big no no. They have asked them very invasive questions about them and their life, and particularly if they're single."
Participant F08

"I will tell you, though, and this is me over sharing at the moment (laughs). I've never been a woman that has been in an uncomfortable situation with a donor. But I know that that happens, right? And there's lots of research on that kind of dynamic, that power dynamic and with more and more women becoming, when the shift of more women and fundraising than used to be in men's world."
Participant F20

"I don't think that my male colleagues get asked the same questions in the same way. So, I think that they get asked about their families, but it's just different. There are certainly questions that I know my male colleagues don't get asked. So, for instance I've had alumni say, like, 'Your husband lets you travel this much? Who makes him dinner when you're not home?' I'm like, 'He has two hands!' It's crazy."
Participant F24

Participants described how female fundraisers have to establish strong boundaries about how much personal information they are willing to share with donors, and be willing to stick to those boundaries, so that donors do not get 'the wrong idea'. For example, if a female fundraiser is willing to share a lot of detail about her dating preferences, then donors might make assumptions about her interest in dating them. Examples:

"I can always feel that coming. And most of the time it's not super blatant, but they you know they start asking things like "Oh, well…" and they asked about relationships, and they you know that sort of thing and so you're just like, wait a second. This is…(shakes head no)."
Participant F03

283

"But I know some of my female colleagues have talked about where they've had to really put their, you know, put their foot down and stay out of a situation that just did not feel right. Don't put yourself in danger or at risk."
Participant M22

Participants described how female fundraisers carry an extra burden of steering the conversation back to the institution and/or the purpose of the interaction to maintain professionalism when it comes to discussing their romantic life with donors. Examples:

"I'm really good at moving conversation. So, I think, even if they started down that path you know I've been pretty good about refocusing a conversation back to having them share with me, or asking him a question that might be a subject changer. But it is moving the conversation forward."
Participant F11

"Yep, and I'm very good at saying I'm not comfortable speaking about this and here's why."
Participant F25

"*I shut that down right away and then I usually don't pursue that person as a donor, because that is a very risky situation, and I think a lot of people (fundraisers) unfortunately feel pressured in those situations. I'm not one of them. I learned that early in my (past) career in banking, if a man is inappropriate with you one time you don't interact with that person anymore, it never ends well for anyone.*"
Participant F08

The excerpts presented in this subtheme align with fundraising research that has identified power dynamics (LePere-Schloop & Beaton, 2022) and sexual harassment in fundraising relationships (Beaton et al., 2021).

The next section describes examples of self-related, mission-related and high depth disclosures provided by participants in the current research. This information is presented separate from the thematic analysis findings because these excerpts were not identified as a theme. Rather, as part of the qualitative research phase, the researcher sought to understand what content participants disclosed, including whether they disclosed self-related, mission-related and high-depth information to donors.

4.2.5 Phase 2: Examples of self-related, mission-related and high depth disclosures

A key objective of the Phase 1 research (see Section 4.1.1) was to test the predictive power of a fundraiser's self-related, mission-related and high depth disclosure content (see Table 3.5 for a definition of each disclosure type). Thus, the researcher also used excerpts from the semi-structured interviews to investigate whether fundraisers do, in fact, disclose this type of information. All 20 participants described sharing self-related information to donors and either high depth or mission-related information to donors as defined in the current research. Many shared both mission-related and high depth information. It is important to note that the interview protocol did not contain any questions that specifically asked participants about sharing self-related, mission-related or high depth information with donors, rather participants shared these examples organically during the interview process.

These excerpts are shared separate from the thematic analysis results because the purpose is not to analyze the data, but rather to document that fundraisers do disclose self-related, mission-

related and high depth information, which could inform future research. A sample of nine excerpts is included in Table 4.34, below, however, examples from all 20 participants are included in Appendix 5. Note that the categories of self-related, mission-related and high depth are not perfectly distinct categories. For example, all of the disclosures are self-related, however, some have additional characteristics that make the disclosures also high depth and/or mission-related.

Table 4.34: Examples of fundraisers' self-related, high depth and mission-related disclosures

Participant ID	Excerpt	Description
F24	I share personal stories with donors every time I meet with them. So, whether it's like what my husband and I did over the weekend with our dog, or what our family is doing for holidays, I mean that that exchange is just natural.	Self-related
M17	I would say, like 90% of the time I'm totally fine saying like you know like and in past relationships like, Oh, yeah, my boyfriend, and I took a vacation to CITY for New Years, or you know, I talk about my family. A lot of folks asked me like, where did your charitable inclination come from? I talk about my grandma who's no longer with us, I talk about my mom. Of course, I've already mentioned I talk about my sisters, and my father's sister, who passed, so I mean sometimes it's like a high level of detail.	Self-related
F20	And so, then I share you know a little bit about it my Covid journey, or they were talking about the venue, and how fall is, you know, and my niece is getting married, this fall. So, then they get a little bit of information. So now they know that I've had Covid they know that I have a niece like, so that's kind of how… you don't share tons, but you open it up. It's that shared connection in if they're willing to share with you, then you share with them.	Self-related
F08	And then I shared, you know, I grew up in a very poor home. So, if not for our church and kind people, there were times that we would never have eaten.	High depth
M04	So, I really dove into… cause he, one of his gifts is to education. So, I told him about how I really, really struggled in high school with dyslexia, and I dove into what it meant for me to have a 1.2 GPA and the told story about it how a teacher had me stand up and read in front of the class, and how she asked me what grade I was in and belittled me, and so I told… So, I told him about that part of the story.	High depth
F27	And so, then my mom passed away, not very long after that, and I made sure to tell them. It's just felt important because they had been checking in about my mom for so long. And so, I made sure to tell them.	High depth
M12	You know, I am the oldest of four kids, and all four of us ended up graduating from UNIVERSITY. Our family had no connection with the university at all before we started, and my father was a high school principal. So, you know, yeah, there are situations, there might be cases where I will talk personally about people who influenced me during my four years here.	Mission-related

M14	I talk about how my educational experience changed my life. I'm a preacher's kid… now you're going to get to hear the story! My parents couldn't afford to send me to a small private liberal arts college. So, I needed scholarship aid, and I got scholarship aid, and I had the opportunity to go to UNIVERSITY, and my life was changed significantly. It was an important part of who I am today, and how I got to where I am today. The faculty, the staff that helped get me there, get me through UNIVERSITY, provided help find aid and all the things that I needed, so that I could get that kind of education that I think was most important for me and so my life was changed in those four years. No doubt about it. I had a great experience, and I wouldn't trade that for the world.	Mission-related
F25	So going through to college, not having the, you know, what I thought were coping mechanisms to, you know, ask for help, study techniques, writing assistance, those you know things that every college has but if you are first generation you don't know where to go, what to ask for, or if you can, because that means some places that's seen as weakness… it means that your first year is going to be a bit of a struggle. And the best way I found to tell that story was to say, here's where I stopped (in college), and here were the real challenges I had. These students won't have that problem and they will outperform me, and I want them to. But this is what it means to invest in a school like this, that transforms lives every single day.	Mission-related

4.2.6 Phase 2: Section Summary

This section presented results from the thematic analysis of the semi-structured interviews. The objective of the Phase 2 research was to help explain the non-significant results from Phase 1. Three areas of interest from Phase 1, *content*, *impact* and *gender differences,* were used during the thematic analysis process to identify themes that provided more detail and information to explain the Phase 1 findings. The table below presents the areas of interest from Phase 1 and related themes from Phase 2.

Table 4.35: Areas of interest from Phase 1 and themes identified in Phase 2

Area of interest	Themes and Subthemes
Content	Theme 1: Context matters • Disclosure is donor-dependent • Disclosure is fundraiser-dependent
	Theme 2: Content delivery • Spontaneous disclosures • Planned disclosures
Impact	Theme 3: Relational benefits • Disclosure builds trust and credibility • Disclosure strengthens donors' relationships
	Theme 4: Links to giving • Disclosures lead to donor behaviour changes • Disclosures improve donors' giving experience
Gender differences	Theme 5: Rewards and risks for female fundraisers • Femininity as an advantage • Safety concerns

Results from the thematic analysis are discussed separately below as they related to the research questions for Phase 2.

Research Question 1: What are fundraisers' lived experiences utilizing self-disclosure during interactions with major donors?

The results of Phase 2 indicate that how participants utilise self-disclosure depends on their own natural tendencies and their feelings about the donors with whom they are interacting. This might explain why the fundraiser's disclosure described in the vignettes in the cross-sectional survey (Phase 1) were not impactful, because they did not allow for flexibility and nuanced responses that the participants in Phase 2 described. For example, participants described that they edited and restricted their disclosure when they perceived that the donor was not genuinely interested or could be judgemental and intensified their disclosure when they 'clicked' with some donors, to whom they felt an instant connection, and a feeling of conversational ease. Based on the findings from Phase 2, the highly structed and standardised nature of a cross-sectional survey might not be the ideal research design for studying self-disclosure.

Results from the thematic analysis also showed that participants delivered their self-disclosure content to donors spontaneously, because of the social norms of the conversation, or when donors asked them direct questions. Often participants disclosed information about common areas of interest they shared with donors, which helped with social bonding and ongoing relationship development. More surprisingly, participants also described that their disclosures to donors are planned and deliberate. Participants reported that, before going into a meeting with a donor, for example, they had a list of topics in their head they could share about themselves. These disclosures usually tied to a point of commonality with the donor, for example, if both the participant and donor attended the same school, cheered for the same sports team, or grew up in

the same area. Participants planned to share personal stories that would help create a feeling of connectedness to donors and disclosed as a strategy to encourage donors to share more about themselves. Participants also planned their disclosures to show the donors they are more than 'just' fundraisers. Participants indicated it was important for donors to see them as real people with passions and values and interests of their own.

Research Question 2: How do fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions?

Phase 2 findings also helped explain that fundraisers, do intentionally utilise self-disclosures to impact donors' giving decisions. The thematic analysis revealed that participants' disclosures were perceived to strengthen the fundraiser-donor relationship and in some cases, disclosures helped create an environment that led to donors giving more than they might otherwise.

The thematic analysis results indicated other relational benefits, including that participants' self-disclosures helped build trust and credibility with donors. These findings support past fundraising research that showed that effective communication from organisations (i.e., direct mail pieces, annual reports) build trust and indicated that interpersonal communication between fundraisers and donors are also important in building trust with major donors. Participants perceived that their disclosures helped build trust by demonstrating they were highly qualified professionals, as well as 'good people' in a more general sense. That is, fundraisers used their disclosures to convince donors of their value on both a professional and personal level. Participants also used their disclosures to indicate a sense of shared identity with donors, which

291

they perceived made donors more willing to invest in the relationship. Disclosures helped increase donors' comfort level and reduced their uncertainty, thus increasing donors' trust and credibility in participants overall.

Phase 2 findings showed that participants' self-disclosures were important tactics directly and indirectly linked to donors' giving. For example, some participants described that "people give to people", and so participants' disclosure inspired donors to give. These participants recognised that fundraisers could use self-disclosure as a strategy to differentiate themselves from other fundraisers who may also be soliciting wealthy donors for major gifts.

Most participants, however, described an indirect link between participants self-disclosure and giving. For example, participants indicated their self-disclosure helped speed up the cultivation process and allowed them to solicit a donor for a gift sooner than they would otherwise. Perhaps because they felt connected to the fundraiser, participants described that donors were more likely to pick up the phone, return an email and accept an invitation after participants disclosed. Donors' more responsive behaviour helped participants have conversations about giving opportunities, secure meetings, and line up opportunities to interact with the donor, which again helped the cultivation process progress more quickly and with fewer complications.

The thematic analysis results indicated that participants utilise their self-disclosure to improve the donors' giving experience. Participants connected donors' improved experience to repeat giving, and long-lasting, ongoing relationships. Self-disclosure helped to deepen relationships between participants and donors, and as a result, many participants described donors as friends.

According to participants, donors' giving experience was improved because participants acted authentically with donors, and they were able to recognise and validate donors' life choices and experiences through their self-disclosures. In this way, participants described how they acted in partnership with donors as part of something bigger, teaming up together to change the world. Participants self-disclosures helped to meet donors' fundamental human needs to connect with others in a meaningful way.

Research Questions 3: Are the lived experiences and perceptions of male and female fundraisers different?

The Phase 1 quantitative research investigated whether the predictive power of fundraiser's self-disclosure on donors' giving intention would be different for female- and male-identifying fundraisers. Participants in the Phase 2 research indicated that male and female-identifying fundraisers share similar types and amounts of personal information, which may explain why there was not a significant relationship between fundraiser gender and giving intention in Phase 1.

Thematic analysis of the semi-structed interviewed did, however, indicate that there are both rewards and risks for female-identifying fundraisers. Rewards included the advantage of femininity. Female participants perceived themselves and male participants perceived female colleagues as being more open, more comfortable discussing emotional or sensitive topics, and more empathetic to donors' experiences. This was attributed to how individuals are socialised and how certain behaviours are associated with either masculine or feminine behaviours. Other

293

rewards included female-identifying fundraiser's ability to discuss stereotypically feminine topics like shopping and fashion. Participants described how female-identifying fundraisers can strike up a conversation – or possibly a relationship – with donors based on these subject matters.

On the other hand, participants also described that female-identifying fundraisers encountered risks when they disclose to donors. The examples provided by both male and female participants mostly revolved around fundraisers' (heterosexual) romantic lives, but also included questions again about stereotypically feminine behaviour like cooking and cleaning. Participants described that female fundraisers must have clear boundaries about what they are comfortable disclosing when donors ask them direct, invasive questions about their dating preferences, interests, and romantic partners. According to participants, female fundraisers must be cautious about what information they disclose to donors about their romantic lives and be particularly skilled at reframing and redirecting the conversation if donors ask inappropriate questions.

The next chapter provides a critical discussion and interpretation of the results from both phases of research.

Chapter 5: Discussion

5.1 Introduction

This chapter begins with an overview of the literature which provides context for the current research, then a review of the research approach and structure is provided. Next, the overall research aims are revisited, and each phase of research is reviewed. A discussion of how findings from both Phase 1 and Phase 2 can be integrated together is provided.

5.2 Overview of the literature

The overall aim of the current research was to investigate what role fundraisers' self-disclosure plays in fundraiser-major donor interactions. The research began by investigating the relationship between fundraisers' self-disclosure content and their gender on donors' giving intention. Unexpected, non-significant results from the initial research inspired a second research phase which more broadly investigated fundraisers' self-disclosure content and its impact on the fundraiser-donor relationship, as well as fundraisers' gender.

The literature review chapter (Chapter 2) provided context by describing the characteristics of the participants in the self-disclosure process – donors and fundraisers – as well as a review of what is known about their interactions. It also identified the theoretical and conceptual frameworks that guided the current research, including a critical evaluation of social penetration

theory (Altman & Taylor, 1973) and the role of self-disclosure in the relationship development process. Finally, the literature review analysed how self-disclosure affects personal and professional relationships, including business-to-business (B2B) marketing relationships because they are similar to major donor-fundraiser relationships (Sargeant & MacQuillin, 2020; Drollinger, 2018) and occur in a professional setting. The literature reviewed provided a foundation from which the current research was built.

The literature review identified a need to understand the relationship between what fundraisers disclose – the content – and donors' behaviours, including giving. Because the fundraising industry is made up primarily of female-identifying fundraisers (Breeze, 2017) and because behaviours associated with relationship building and connecting with others, including self-disclosure, are typically considered stereotypical female behaviours (Dindia & Allen, 1992), the literature review also identified a need to investigate the self-disclosure of female- and male-identifying fundraisers. The literature showed that fundraisers' do disclose personal information to donors (e.g., Breeze, 2017; Breeze & Jollymore, 2017) however no studies to date have intentionally studied fundraisers' self-disclosure or its effectiveness as part of the relationship development process in a fundraising context. This research attempts to address the need for additional information and understanding and contribute to existing knowledge.

5.2.1 The Context of the Research

The fundraising environment

The literature review showed that developing strong relationships with major donors is a top priority for organisation leaders (Buteau et al., 2019) and that, in personal (Sprecher & Hendrick, 2004) and professional (Haytko, 2004) relationships, self-disclosure is the primary way individuals build relationships with one another. Despite this, no research to date has investigated self-disclosure in a fundraising context. Fundraisers' primary job responsibility is establishing and strengthening relationships with major donors (Hartsook & Sargeant, 2010), yet the literature review showed that fundraisers themselves are rarely studied (usually donors are studied), despite their close proximity to major donors (Breeze, 2017) and recent research that shows that fundraisers actually help inspire and co-create major gifts along with donors (Nyman et al., 2018; Alborough, 2017). In the practitioner literature, fundraisers are urged to create, build, develop, and grow strong relationships with donors, without guidance on what they should – or should not – do (McLoughlin, 2017). Thus, fundraisers rely on trial and error and anecdotal evidence from more experienced fundraisers (Breeze, 2017) to guide their behaviour, especially when interacting one-on-one with donors. It was a priority of the current research to investigate fundraisers as key actors in the relationship development process and test practical strategies, like using self-disclosure, that fundraisers could be used to develop or strengthen relationships with donors, or influence donors' behaviours.

Self-disclosure as a relationship development tool

The literature review identified social penetration theory (Altman & Taylor, 1973) as an ideal lens through which to examine the role of self-disclosure in relationship development (Greene et al., 2006). According to social penetration theory, relationships develop in a linear fashion during which individuals gradually allow themselves to be known by revealing incrementally more personal information (Altman & Taylor, 1973). Thus, the development of relationships is driven by the self-disclosure process (Altman & Taylor, 1973). As individuals take turns self-disclosing information, they feel closer and more committed to one another (Gore et al., 2006), which would likely benefit the donor-fundraiser relationship.

Differences in the way male- and female-identifying individuals disclose have been studied for decades, with some research showing small differences in female-identifying individuals who disclosed more information, were more likely to reciprocate the disclosures they received from others and were more likely to share high-depth information (Dindia & Allen, 1992; Dindia et al., 1997). Because findings related to gender differences in self-disclosure have been small and/or inconclusive, the current research contributed to knowledge by investigating differences in a new context, fundraising, however, gender differences were not expected.

Self-disclosure in professional relationships

The literature review also showed that social penetration theory (Altman & Taylor, 1973) has been used in the marketing literature to explain relationship development in business-to-business

(B2B) relationships. B2B marketing relationships were studied because they are similar to major donor-fundraiser relationship (Sargeant & MacQuillin, 2020; Drollinger, 2018). A review of self-disclosure in B2B relationships revealed that self-disclosure improves professional relationships by increasing cooperation among customers (Murry & Heide, 1998), and increasing levels of trust, improved communication and conflict management, and increased the buyer's confidence in the seller (Koponen & Julkunen, 2022), however, to date no studies have investigated the direct link between self-disclosure and behaviour, like giving. In this way, the current research sought to contribute to the existing body of knowledge.

To investigate the relationships identified in the literature review, the research occurred in two distinct phases. The first, Phase 1, included a cross-sectional survey of major donors. The second, Phase 2, included semi-structured interviews of major gift fundraisers. The next sections of this chapter present an overview of each research phase.

5.3 Overview of research

The current research consisted of a sequential explanatory mixed methods approach beginning with a quantitative phase followed by a qualitative phase. The quantitative (Phase 1) research consisted of a cross-sectional survey to investigate the predictive power of a fundraiser's self-disclosure content, and their gender, on a donor's giving intention. Results from Phase 1 were largely non-significant. Thus, a second phase of the research was required to further investigate the research questions. An interview protocol for the qualitative (Phase 2) research was developed, which focused on how fundraisers utilise self-disclosure in their interactions with

major donors and how they perceive their self-disclosure affects their relationships with major donors. A series of semi-structured interviews were conducted to explain and provide additional detail and information related to the lack of significant findings from the Phase 1 research. The next sections explain each phase of the research.

5.3.1 Phase 1: Cross-sectional survey

Initially, the researcher was interested in understanding how fundraisers' disclosures influenced donors giving decisions, including whether the content and/or the fundraiser's gender could predict an increase in donors' giving intentions. Using social penetration theory as a framework, the researcher designed a cross-sectional online survey to test the relationship between different types of fundraiser disclosure content on donors' giving decisions. The following objectives guided this phase:

1. To determine whether the content of a fundraiser's self-disclosure predict a donor's giving intention.

    a. To determine whether the results of objective 1 are different for male and female fundraisers.

2. To investigate the relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents. Is there a "ripple effect"?

3. To determine whether variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention.

The online survey was distributed by a representative from the Indiana University Foundation via an email link. They estimated the link was distributed to 3,000 individual major donors who were over the age of 18 and had given a one-time gift of $10,000 or more. An exact number of survey links distributed was not provided. A total of 509 participants began the survey, however, only 290 completed all questions, resulting in a response rate of 9.67%. Vignettes were used to provide to participants a hypothetical scenario in which a fundraiser disclosed during an interaction. However, based on the lack of statistically significant findings, it's possible that participants did not interpret the vignettes as the researcher intended. The data analysis consisted of descriptive statistics and moderated mediation statistical analysis.

Descriptive Statistics

Descriptive statistics showed that participants in the current research were representative of major donors in the U.S. Cronbach's alpha was used as an indicator of the internal consistency of the instruments used in the survey (Black, 1999) and all measures revealed a Cronbach alpha value of 0.7 or higher, which is an indicator of acceptable internal consistency (Black, 1999). As noted in Chapter 3, the moderated mediation analysis used in this research project does not require normal distribution of data (Hayes, 2017), thus issues related to skewedness and kurtosis were not discussed.

A moderated mediation statistical analysis was conducted using ordinary least squares (OLS) regression to examine the relationship between a fundraisers' disclosure content and their gender on donor's giving intention. Three mediating variables were tested: communal strength, connection, and commitment. One moderating variable was also tested: moral identity. The purpose of the analysis was to achieve the research objectives, however, few significant findings occurred, and it was determined that additional research was necessary to fully answer the research questions. Phase 2 research is described next.

5.3.2 Phase 2: Semi-structured interviews

The purpose of the semi-structured interviews was to provide additional detail and information that could explain why so many results from the quantitative Phase 1 were non-significant. An interview protocol and the thematic analysis process was informed by the results of the quantitative phase (Creswell & Plano Clark, 2018). The research objectives for this phase were:

1. To investigate fundraisers' lived experiences utilizing self-disclosure during interactions with major donors.

2. To understand how fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions.

3. To describe whether the lived experiences and perceptions of male and female fundraisers differ.

Twenty semi-structured interviews were conducted, and the qualitative data was analysed using a six-step thematic analysis process (Braun and Clarke, 2006). Areas of interest from Phase 1, including content, impact, and gender differences, were identified to guide the thematic analysis and help explain the non-significant Phase 1 results.

Although in the current research the quantitative research was conducted first and the qualitative research was conducted during the second phase, upon reflection, the researcher recognises that there might have been some value in beginning with the qualitative phase to solidify an understanding of how fundraisers utilise their self-disclosure in interactions with major donors. If conducting this research again, the researcher would recommend beginning with a qualitative phase and supplementing those findings with additional quantitative inquiry. An initial qualitative phase could also provide additional detail to inform scenarios depicted in the vignettes.

This section described the process of how the current research was conducted. Next, each research objective will be discussed separately.

5.4 Research objectives revisited

The overall aim of the research was to investigate what role fundraisers' self-disclosure plays in fundraiser-major donor interactions. The aim was achieved by completing the following objectives, discussed separately. Significant results from the hypothesis testing in Phase 1 as well as results from the thematic analysis that occurred in Phase 2 are presented in the next section.

1. To determine whether the content of a fundraiser's self-disclosure predicts a donor's giving intention.

This objective was addressed using both phases of research. A review of the literature revealed that individuals use self-disclosure to develop strong personal (Derlega et al., 2008) and professional relationships (Koponen & Julkunen, 2022) with others. For example, in marketing relationships, salespeople and customers who participated in mutual self-disclosure reported increased job satisfaction and conflict resolution (Haytko, 2004), however, existing research did not investigate the relationship between self-disclosure and behaviour (i.e., a customer's purchasing decision). This was identified as a gap in the literature which the current research attempted to fill.

During the moderated mediation analysis, one significant relationship between the fundraiser's self-disclosure and the donor's giving intention was identified. In testing hypothesis 5, it was determined that a fundraiser's self-disclosure predicted donors' intention to donate. This relationship was explained by the participants' feelings of connection to the fundraiser. However, this result was only true for individuals with lower moral identity. There are several possible explanations for this finding. First, it is plausible that individuals with lower moral identity are more likely to make their giving decisions because of the feelings they have for the fundraiser as a result of receiving self-disclosure, whereas individuals with higher moral identity may be making their giving decisions because they feel it is the morally 'right' thing to do. This finding was surprising because several studies have linked high moral identity theory to helping behaviours. For example, Aquino and Reed (2002) found that individuals with high moral identity were more likely to volunteer to help others than individuals with low moral identity.

Similarly, (Reed & Aquino, 2003) found that individuals with high moral identity donated more money than individuals with low moral identity. However, the current research found that individuals with lower moral identity helped more than others. Past research by Aquino and Reed (2002) and Reed and Aquino (2003) investigated annual donors whereas the current research investigates major donors. Therefore, there may be differences between the way major donors and annual donors perceive their giving, or the self-importance of morality, which might explain the results.

It is also possible that, perhaps because of the research design, the participants were not thinking of morality at the time of giving so their sense of moral identity might not have been active or engaged enough to influence their behaviour. Research by Shang et al. (2020) finds that priming moral identity generates higher giving, especially among women donors. So, it is possible that moral identity needed to be primed to impact donors' giving decisions.

This finding is important because it demonstrates that a fundraiser's self-disclosure can predict higher giving for some donors (i.e., those with lower moral identity) and that the relationship between self-disclosure and donors' giving is mediated, or explained by, participants' feelings of connection with the fundraiser. This finding is supported by social psychology research which finds that receiving someone else's self-disclosure can have relational and psychological benefits (Greene et al., 2006; Gray et al., 2015) and can result in people feeling closer and more connected (Reis & Shaver, 1988). Thus, these findings support the idea that the fundraiser plays an important role in influencing donors' giving and makes a contribution to knowledge by

explaining that donors' feelings of connection with the fundraiser explain the process, at least for some donors.

Results from the semi-structured interviews in Phase 2 helped explain and provide additional detail related to this research objective. For example, the qualitative findings helped explain how fundraisers' disclosures are related to donor's giving, as exemplified in the excerpt below:

Participant M04: *"That's the dynamic of fundraising. Ask anyone who gives money, and they will tell you that a large part of it had to do with how they felt about the person asking them for money."*
Researcher: "*Interesting. So, you think there's a direct link (between self-disclosure and giving)?"*
Participant M04: *"100%."*

Although Participant M04 agreed there is a "direct link", he describes that disclosures affect the way donors' feel, and suggests that those feelings are what drives donors' giving decision. This finding aligns with past research that shows that self-disclosure helps deepen relationships between individuals and draws them closer together (Reis & Shaver, 1988), and also indicates that self-disclosure drives the relationship development process, as suggested by social penetration theory (Altman & Taylor, 1973). Phase 2 findings build on past research and suggest that fundraisers' self-disclosure is an important ingredient in the recipe for relational success and may be the spark that lights the flame that ignites donors' decision to give. For example:

"It (self-disclosure) allows you to make a connection with a person which will more often lead to a donation which leads to a relationship with that person, which allows that person to make sometimes a more significant impact than they would think that they would otherwise be able to make."
Participant F08

306

These findings suggest that self-disclosures help donors become emotionally invested in the relationship with the fundraiser as well as the cause, creating an environment that is conducive to the donors' own self-exploration and revelations that may prompt giving.

1a. To determine whether the results of objective 1 are different for male and female-identifying fundraisers.

This research objective was addressed using findings from both the quantitative (Phase 1) and qualitative (Phase 2) results. Moderated mediation statistical analysis indicated that the fundraiser's gender did not predict giving, however, a significant relationship was found between a fundraiser's gender and the participant's feelings of communal strength toward the fundraiser. These results, from hypothesis 5, found that donors experienced increased feelings of communal strength when they received self-disclosure from a female-identifying (versus male-identifying) fundraiser. That is, donors of both genders reported higher levels of feelings of being willing to sacrifice, incur costs and experience distress to meet the needs of female fundraisers. This result was statistically significant for all donors, as well as for donors with lower moral identity.

This result was surprising. Gender was an important variable to investigate in the current research because the fundraising profession is dominated by female fundraisers (Dale & Breeze, 2021), however, because the literature supports only small differences in male and female disclosures (with females disclosing more) (Dindia & Allen, 1992), no differences in the fundraiser's disclosure were expected. One possible explanation for the significant findings is that thus the disclosures from female fundraisers may have been considered more typical behaviour for female, rather than male, fundraisers. The analysis run during hypothesis testing

controlled for participant gender and found no statistically significant difference between responses, thus, the possibility of heterosexual attraction between participants and the hypothetical fundraiser can be ruled out.

These results identified a significant relationship between the fundraiser's disclosure and donor's feelings of communal strength, but there was no significant relationship that led to giving. Therefore, the results suggest that the communal strength that donors feel towards fundraisers may be more related to their willingness to emotionally – rather than financially – sacrifice, incur costs and face distress on behalf of the fundraiser. This result was surprising because the literature supports that individuals with high communal strength are more likely to help friends (Mills et al., 2004), however, this research suggest that donors help for fundraisers may not extend to giving.

2. To investigate the relationship between the content of a fundraiser's self-disclosure and donors' feelings about the institution the fundraiser represents, including whether there is a "ripple effect".

Both phases of research were used to investigate this research objective. In Phase 1, there was no evidence to support the relationship between the content of a fundraiser's self-disclosure and donor's feelings about the university. This was interesting because fundraisers are often seen as the physical embodiment of the organisations they represent (Shaker & Nelson, 2021). Therefore, it was expected that the fundraiser's self-disclosure would be positively related to participants' feelings about the organisation. One possible explanation for this result is that participants are able to compartmentalise their feelings about the organisations they support and

the fundraisers with whom they work and thus their feelings about the fundraiser do not affect

their feelings about the organisation.

However, the semi-structured interviews in Phase 2 found contradictory results. Participants'

perceptions were that their self-disclosures improved the way donors felt about them, the

fundraisers, *and* the institutions they represented. For example,

"Yes, I do. So, yeah, I think I if I'm building that relationship with them, and they enjoy that
relationship, then yeah, I think they would think favourably of the University."
Participant M10

"I think in general, the more vulnerable you can be and the more you share, the stronger
relationship to an institution, yeah."
Participant M17

One possible explanation for the contradictory findings from Phase 2 is that different constructs

other than connection, commitment and communal strength should be measured. It's possible

that while donors do not experience increased feelings of constructs measured in the current

research, they may feel increased feelings of other constructs like intimacy, liking, or attraction,

for example.

Another possible explanation for the contradictory findings is that the research design of the

cross-sectional survey using vignettes was problematic. The literature suggests that sometimes

research utilizing vignettes is not effective if survey respondents are unable to respond from the

perspective of the vignette character (Hughes & Huby, 2002), for example, from the perspective

309

of the hypothetical donor that was described in Phase 1. Although the researcher attempted to

address this potential methodological pitfall by piloting the survey with fundraisers and major

donors prior to data collection (see more information in Section 3.4.5), it is possible that the

vignettes influenced participants' responses.

3. To determine whether variables identified from the literature review mediate or moderate the relationship between a fundraiser's self-disclosure and a donor's giving intention.

This objective was addressed through the cross-sectional survey, which tested specific mediating

and moderating variables. The only result that provided evidence for mediation was related to

connection and was discussed previously as part of research objective 1.

Moral identity was included as a potential moderator in the Phase 1 research; and identified as a

variable of interest because the literature finds that individuals' social identities, like moral

identity, guide the way they process social interactions and behave (Kang & Bodenhausen,

2015), and major donors may be more likely to have high moral identity, which also may

influence their giving (Shang et al., 2020).

Results from the cross-sectional survey indicate that moral identity is an important variable to

include in investigations of the fundraising process and fundraising relationships. Two of the

three significant findings from Phase 1 results were conditional upon moral identity. That is, the

results were significant only for participants with lower moral identity. Donors with lower moral

identity gave more after fundraisers disclosed, as a result of feeling more connected to the

fundraiser. This suggests that the interactions with fundraisers, and feeling emotionally connected to the fundraisers, may be more important for donors with lower moral identity. Donors with lower moral identity may be more likely to donate based on feeling close to the fundraiser, rather than feeling it is the morally 'right' thing to do.

Similarly, as described in the discussion of research objective 1a, results showed that donors with lower moral identity felt increased feelings of communal strength for female-identifying, but not male-identifying fundraisers, after they disclosed. One possibility for this result is that self-disclosure may be perceived as more typical behaviour for females (versus males), thus donors may feel more comfortable and more compelled to help them.

The results contradict findings from the literature review. For example, Kennedy, Kray and Ku (2017) find that women's sense of moral identity can be explained by relational terms. That is, women are socialised to learn that being moral helps them build relationships with others, which influences their identity as a moral person (Kennedy et al., 2017). Using this logic, we would have expected female donors (survey respondents) with high moral identity to show increased feelings of communal strength, commitment, and connection with fundraisers because all of those constructs are related to relationship-building. Instead, the results of the current research show that the donor's gender did not increase their relational feelings toward the fundraiser. One explanation for this is that morality was not at respondent's top of mind when they were completing the survey. Past research (Aquino et al., 2009) shows that moral identity can influence behaviour (i.e., giving) more strongly when it is situationally salient. Therefore, one possible explanation for the results of the current research is that respondents were not thinking

311

about morality when they were making their giving decisions, which reduced the effect of moral identity on their giving.

4. To investigate fundraisers' lived experiences utilizing self-disclosure during interactions with major donors.

This research objective was addressed using the semi-structured interviews in Phase 2. The literature identified that self-disclosure is critical to building personal relationships (i.e., with friends, roommates, romantic partners) (Derlega et al., 2008) professional B2B relationships (Koponen & Julkunen, 2022), and some recent research suggested it could also be important in fundraising relationships (Shaker & Nelson, 2021). However, a gap was identified in that self-disclosure had not intentionally been studied in a fundraising context, and additional information was needed to understand *how* fundraisers utilise their self-disclosure in interactions with major donors.

Results from the Phase 2 research build on past research and provide additional rich detail and information related to fundraisers' lived experience using self-disclosure in fundraising relationships. For example, the results suggest that most relationships between fundraisers and major donors progress in a linear fashion and are characterised by low-depth disclosures early in the relationship (i.e., factual information like hometown, past work experience) to high-depth disclosures later in the relationship (i.e., emotion or values-based disclosures describing difficult life experiences, hopes, worries), supporting social penetration theory (Altman & Taylor, 1973) and past research describing the evolution of fundraising relationships (Shaker & Nelson, 2021).

However, a key finding of the current research is that while fundraisers' conversations typically becoming incrementally more intimate, some describe searching for opportunities to make an emotional, deeply personal connection with donors early on in the relationship, especially if they sense the donor needs or wants to make a personal connection. For example, the following excerpt describes an interaction Participant M04 had with a donor at their first meeting:

"So, I told him about how I really, really struggled in high school with dyslexia, and I dove into what it meant for me to have a 1.2 GPA and the told story about it how a teacher had me stand up and read in front of the class, and how she asked me what grade I was in and belittled me, and so I told… So, I told him about that part of the story."
Participant M04

These results suggest that while fundraisers initiate relationships by sharing more superficial information, they are looking for opportunities to quickly increase the depth of the disclosure if possible. This builds on past research (Breeze, 2017) which shows that fundraisers must have high emotional intelligence to understand whether an intimate self-disclosure such as the excerpt by Participant M04 would be well-received early in the relationship. These results also indicate that fundraising relationships may develop in ways that deviate from how other professional relationships develop. For example, Koponen and Julkunen (2022) find that self-disclosure in B2B relationships also slowly progresses from low to high depth.

Results from the semi-structured interviews also suggest that the context in which disclosures occur is very important to fundraisers. Omarzu's (2000) disclosure decision model indicates that while individual differences (i.e., natural tendencies to be more or less open in sharing with others) play a role in what and how people disclose to others, situational factors also come into

313

play. Results from the current research build on Omarzu's (2000) findings by suggesting that in fundraising relationships, fundraisers quickly make assumptions about donors and adjust, vary, and edit their disclosure based on what type of person they perceive the donor to be and how favourably they anticipate the donor will respond. Similarly, Shaker and Nelson (2021) find that fundraisers use unspoken cues to gauge the relational norms about how much – or how little – information to share with donors. However, this is the first known research to describe how conversational partners edit their disclosure content based on assumptions they make about each other.

The results also build on past research that emphasises the importance of storytelling in fundraising relationships. Storytelling has been studied in a fundraising context, typically related to grant seeking (Clarke, 2009) or, more frequently, related to sharing the personal stories of non-profit beneficiaries, such as through direct mail pieces or other organization-focused communications (Merchant et al., 2010; Clark, 2009; Kaufman, 2003). In the current research, almost all of the fundraisers who participated indicated that they always share personal stories with donors. The results also indicate that storytelling is important even for fundraisers who prefer not to share personal information. These more reserved fundraisers rely on the personal stories of students (who are also beneficiaries) and institutional leaders to help engage donors on an emotional level and narratively describe the impact of their institution's mission on those in need.

Other results were unexpected. For example, this is the first known research to suggest that fundraisers plan – and sometimes rehearse or practice their self-disclosures in a professional

314

setting – before they meet with donors. One participant described how he has a running list of

topics he can disclose prior to a donor meeting. These were usually related to common points of

interest (i.e., attending the same college, playing the same sport, belonging to the same sorority).

Another participant described how the fundraising department at her institution practices their

disclosures in a group setting, during team meetings. For example:

"So, my other team members will be like (giving her feedback), okay, PARTICIPANT, like you forgot to mention that your dad was in the military. Like he worked there for 35 years. People wanna hear that, or the way that you talked about you know ORG (where she worked in the past) was really great, but you skipped over like this one thing that people, you know, would love to hear, so talk about that."
Participant F24

Because of the time and energy participants put into planning for and thinking about the

information they disclose to donors indicates that it is an important strategy in developing

relationships with major donors.

5. To understand how fundraisers perceive their self-disclosure impacts their relationships with donors or donors' giving decisions.

This research objective was addressed during Phase 2, using data from the semi-structured

interviews. The literature review revealed that self-disclosure is an effective tool for building

strong personal (Greene et al., 2006) and professional (Haytko, 2004) relationships, yet it had not

been intentionally studied in a fundraising context. This was identified as a gap because

developing relationships with major donors is a primary concern for non-profit leaders (Buteau

et al., 2019), including colleges and universities, and is the most important part of major gift fundraisers' work (Hartsook & Sargeant, 2010).

The results suggest that fundraisers utilise their self-disclosure in a way that is strategic and tactical. They are looking to make an emotional connection with donors, as explained previously, but they are doing so because building an emotional connection makes strategic sense. For example, the current research indicates that fundraisers use their self-disclosure to differentiate themselves and their cause from other fundraisers or organizations. The excerpt below exemplifies this point:

"So, what makes computer science at UNIVERSITY for our donors different than at their alma mater and schools around them? Why do we care? And so, when I can add that personal touch to, whether it is me personally, or students' personal story, faculty members' personal story, whatever it is that connection, and that that genuine, I don't know, feelings, I think come through and I think that's what kind of clinches it for us, often."
Participant M22

Once again, this differs from the marketing literature. Koponen and Julkunen (2022), for example, find that salespeople disclose to customers to influence switching costs. They find that salespeople's disclosure discourages switching among customers who become socially bonded with salespeople who disclose. The current research, however, suggests that fundraisers disclose to set themselves and their organizations apart from other causes to which donors may consider contributing.

The current research builds on past research in two important additional ways. The first is related to how fundraisers use self-disclosure to build trust. Research by Shaker and Nelson (2021) and

Koponen and Julkunen (2022) both suggest that individuals in fundraising and B2B relationships use self-disclosure to build trust with partners. The current research goes further to describe how. First, the current research suggests that fundraisers use disclosures to "humanise" themselves with donors. Fundraisers share personal stories to demonstrate to donors that they are interested in more than just raising money, and fundraisers perceive that donors find this comforting. These results build on Shaker and Nelson's (2021) research which finds that fundraisers disclose to demonstrate professional competence, thereby building donors' trust that their donations will be spent correctly. Results from the current reseach suggest that, in additional to demonstrating their professional competence, fundraisers also disclose to demonstrate that they are "good people". Fundraisers share stories about pets, kids and family to convey that they are upstanding individuals who are worthy of donors' trust. For example:

"I share my values, and I you know I share my, you know, my opinions in in some regard. Because I, because I think it shows that you're a person, and that you have a heart, and that you believe in something, you know, beyond just, you know, kind of the classic box of fundraising, right? Like, you also have hopes and dreams and thoughts and ideas."
Participant F03

The results suggest that fundraisers also build trust with donors by communicating to the donors, *we are the same*. Fundraisers disclose about shared interests and experiences (i.e., they attended the same college, worked with the same coach, were from the same hometown) to create common ground and facilitate future conversations. This suggests that fundraisers disclosures help show donors they are both part of the same in-group, thereby reducing uncertainties and building donors' trust and confidence in the fundraiser.

Finally, results build on past research that suggests that donors' fundamental human need to feel connected to others can be met through their relationships with the organizations they support (Edworthy et al., 2022). For example, Edworthy et al. (2022) find that donors donate more, and experience improved psychological wellbeing when the text in a direct mail piece emphasises the donors' connection to the organization. The current research supports Edworthy et al.'s (2022) call for organisations to work to meet the psychological needs of donors rather than the needs of the organisation or its beneficiaries. Results from the current research are important because they show that fundraisers – through their interpersonal connections with donors – may play an even more important role in improving donors' psychological wellbeing than through the organisation's communication via the direct mail and other communications (the written word). This may be particularly important in major gift fundraising when some donors seem to need a person-to-person connection to add meaning to their giving decision. The fundraisers in the current research perceive that they have a role to play in meeting donors' needs to feel connected, as the excerpt below exemplifies:

"But for whatever reason, when we were talking about this, you know, he just kept looking at me, and like, I could sense that he was... He was trying to understand who I was, a little bit, too, and because it was our first meeting, he probably didn't have any sense of you know of a background. And you know we're talking about where we grew up, and families, and you know."
Participant F03

As the excerpt above indicates, fundraisers perceive that their willingness and ability to meet the psychological needs of donors, at least in some cases, is critical. If they cannot meet donors' needs in this way, the fundraisers in the current research perceived that the relationships would not move forward. This indicates that both fundraisers and their self-disclosures play an

318

important role in meeting donors' needs and also contributing to the psychological wellbeing of donors during the fundraising process.

6. To describe whether the lived experiences and perceptions of male and female fundraisers differ.

This objective was addressed using Phase 2, the qualitative research. Results build upon past research that finds that fundraising work, especially major gift fundraising work, is closely aligned with stereotypical female behaviour, including good communication, warmth, an ability to build strong relationships with others and manage emotion (Dale, 2017). Participants in the current research perceived that female-identifying fundraisers were better able than their male counterparts to engage emotionally with donors and discuss heartfelt topics. Importantly in the current research, female fundraisers were perceived to have a relational advantage in being able to connect with donors on stereotypically feminine topics like fashion, jewellery and other subjects related to aesthetics. This is important to understand in the context of relationship building. As fundraisers are working to create a social bond or common point of interest with donors, female fundraisers were perceived as having an advantage, as indicated in the excerpt below:

"I was watching one of my colleagues just the other day, and I'm talking to this donor -- this is a donor that I had found years ago on a discovery list. And I'm talking to her about her profession, and how retirement is, and then this colleague walks up and the donor said **'***Oh, my gosh, I love those earrings! They match your dress perfectly! Where did you get them?!'** You know, and it's like all of a sudden…(snaps) 'I love yours, too', you know…. there's this this back and forth. I was like… hmmmm… that's interesting!"*
Participant M10

Being able to connect with donors in this way may give female fundraisers a professional

advantage. However, results from the current research also suggest that female fundraisers

encounter risks in how and what they disclose to donors. The results build on existing research

that finds that female fundraisers may be vulnerable because of the intimate and social nature of

interactions with donors (Dale & Breeze, 2021). The current research suggests that female

fundraisers do face additional risks when they are disclosing information to donors, especially

related to their romantic partners, and dating lives, and aligns with research by Dale and Breeze

(2021) which finds that female fundraisers commonly report instances of being propositioned for

dates and more by donors. Results from the current research indicate that the power imbalance

that exists in these relationships require that female-identifying fundraisers be more aware that

these risks exist, establish strong and clear boundaries and be more adept at steering the

conversation back to professional matters than their male counterparts. For example:

*"I'm really good at moving conversation. So, I think, even if they started down that path you
know I've been pretty good about refocusing a conversation back to having them share with me,
or asking him a question that might be a subject changer. But it is moving the conversation
forward."*
Participant F11

5.5 Chapter summary

This chapter provided a detailed discussion and interpretation of the results of the current two-

phased research. Gaps identified in the literature review were revisited and a discussion of how

the research objectives helped address these gaps and contribute to new understandings were

described.

Results from the current research, especially the lack of significant findings in the first phase, were surprising. Although the hypotheses and predictions for the cross-sectional survey were grounded in theory and a strong conceptual framework, the findings did not demonstrate that fundraisers' disclosure predicted donors' giving intention, and although potential mediating and moderating variables were explored, few significant results were found. This chapter explores several possible reasons for the lack of findings.

Rather, the most interesting and helpful results came from Phase 2 of the research, which included semi-structured interviews to explain how fundraisers use self-disclosure in their interactions. Results from the current research built on past research, for example, and went beyond identifying that fundraisers use self-disclosure to build trust in their relationships to explain how they do so – by using their self-disclosure to humanise themselves and demonstrate that they are not just a "good" professional, but also a "good" person. The results described in this section demonstrate that fundraisers play an important role in building relationships with major donors by helping meet their psychological needs to create interpersonal connections with others. In addition, results from the current research suggest that female-identifying fundraisers may face unique rewards and risks associated with how they use their self-disclosure when interacting with donors. The following chapter describes the contributions to knowledge, implications for practitioners, ideas for future research and limitations of the current research.

Chapter 6: Conclusions

6.1 Introduction

This chapter provides a conclusion for the doctoral research. The chapter begins with a discussion of the contributions to knowledge, as well as implications for practitioners for both Phase 1 and Phase 2 research. Next, suggestions for future research are included. The chapter ends with a discussion of the limitations of the current research.

6.2 Contribution to knowledge

The research identified four contributions to knowledge. The first contribution is the finding that there is a significant and positive relationship between a female-identifying (but not a male-identifying) fundraiser's self-disclosure and the donors' feelings of communal strength. This indicates that when female fundraisers self-disclose, donors experienced increased feelings of be willing to sacrifice, incur costs and experience distress to meet the needs of the fundraiser. However, these feelings for the fundraiser were not related to donors' decisions to give. This suggests that donors may be willing to emotionally – but not financially –sacrifice, incur costs and experience distress to meet the needs of the fundraiser, and provides further understanding of the role communal strength plays in major gift fundraising relationships.

The second contribution is the incremental advancement of social penetration theory. The current research tested the theory in a new context, fundraising, and investigated its predictive power on donors' giving intention. This was the first study to test whether self-disclosure could affect behaviour. It was expected that a fundraiser's self-disclosure would lead to donors' increased giving, however, this was found to be true only for individuals with lower moral identity. This suggests that further study is necessary to understand whether social penetration theory can, in fact, predict behaviour and in what situations it is most impactful.

The third contribution to knowledge is that the current research further expands the understanding of the role fundraisers play in the fundraising process. Major gift fundraisers work closely with donors who can make transformational gifts to institutions, and yet very little is known about how what fundraisers say and do affects donors' decisions, feelings and actions. Results from the semi-structured interviews suggest that fundraisers work to improve donors' psychological wellbeing and develop relationships with them that help meet their fundamental human need to connect with others. This finding builds on recent research (Edworthy et al., 2022) that indicates that this may be an effective strategy for major gift fundraisers to employ. As a result of the current research, we know more about how donors build relationships with major donors.

The fourth and final contribution to knowledge is that the current research identifies self-disclosure as an effective tool for relationship development and increases our understanding of how fundraisers use self-disclosure to build relationships with donors. This was the first time

self-disclosure was intentionally studied in a fundraising context. Results from the semi-structured interviews suggested that fundraisers recognise self-disclosure as strategy to improve donor cultivation and the giving experience overall. Fundraisers in the current research make strategic decisions about what and when they share information about themselves with donors and acknowledge the value of self-disclosure in the fundraising process. They use self-disclosure to build trust with donors and as a strategy to improve cultivation.

The following section describes how the findings and contributions from the current research can be utilised by fundraising practitioners and non-profit organizations.

6.3 Implications for practice

Findings from the current research are important for fundraising practitioners and non-profit fundraising leaders to understand. The process of developing strong, long-lasting relationships with major donors requires significant resources and understanding any mechanism that could influence whether or how much a donor gives to a cause will no doubt be of interest. The current research found that donors' moral identity may influence their giving intention and feelings about the fundraisers with whom they work. Although it may not be realistic to screen donors for their moral identity, education and training for fundraising managers should describe the importance of donors' moral identity in the fundraising process. This understanding and awareness may help fundraising managers make decisions, for example, about which fundraisers are assigned to work with which donors.

The findings also showed that fundraisers regularly utilise self-disclosure to build relationships with donors. However, the literature review demonstrated that self-disclosure comes with risks. For example, self-disclosure opens individuals up to possible rejection or vulnerability (Altman & Taylor, 1973), and some fundraisers may be concerned about their privacy (Derlega et al., 2008) if they are interacting with donors who want them to share more than they are comfortable. Developing trainings that help build fundraisers' disclosure skills could be helpful, especially for fundraisers who naturally disclose less than their counterparts. Fundraisers could benefit from trainings that help them establish clear personal boundaries and guidance on what, when and how to disclose to have the most significant positive impact on the donor relationship.

The findings suggest that self-disclosure is extremely prevalent in fundraising relationships. As such, fundraising managers should be aware of how their fundraising team members are utilizing self-disclosure in their interactions with donors. Managers should check-in with their staff and ask them to share examples of moments they disclosed (or did not) to donors, especially in relationships that seemed to be stalled or deteriorating to determine if either too much or too little self-disclosure was the culprit. Practicing fundraisers could benefit from coaching or support if they are working with a donor who seems to require more self-disclosure than they are comfortable giving.

Finally, the findings suggest that developing new coaching and support systems geared specifically toward female fundraisers may be particularly important. The results of the semi-structured interviews indicate that female fundraisers face unique risks in what information they disclose to donors, especially information related to their dating life or romantic interests.

Fundraising managers should be aware of these risks and, once again, check-in with their fundraising staff members about what type of personal information they are sharing with donors and whether they feel pressured by donors to share more than they are comfortable. Findings suggest that training for female fundraisers may also be important so that they are prepared to deal with inappropriate questions from donors and can implement strategies to ensure the relationship remains respectful and professionally appropriate.

The next sections describe limitations of the current research and suggestions and opportunities for future research.

6.4 Limitations

As with all research, the current research consisted of some limitations, which are discussed here.

First, the research design consisted of a mixed method approach using two phases of research – both quantitative and qualitative. A limitation of this approach is the expertise of the researcher. In mixed method research, the researcher needs to be familiar with collecting and analysing both qualitative and quantitative data. As the researcher of this dissertation is inexperienced, this may have affected the results of the current research.

Several limitations associated with the quantitative Phase 1 research were identified. First, only participants from one institution, a university in higher education in the U.S. were used. By using

only one institution for the research, the findings cannot be generalised outside of one sector of non-profit organizations (higher education) and because it is a snapshot of the experiences of donors at only one institution. Participants self-selected to participate in the study and a high number of individuals chose not to participate – 509 individuals of approximately 3,000 who were sent the survey responded and 290 finished the survey. Incomplete responses were not included in the statistical analysis, which could have resulted in biased findings. In addition, a lack of diversity among survey respondents also could be considered a limitation of the current research. Most participants in Phase 1 (96%) were Caucasian. Although other studies have found that a majority of major donors are Caucasian (i.e., Osili et al., 2021), they reported greater diversity among respondents, which may have affected the findings of the current research.

Two other limitations of the quantitative research were related to research design. First, several variables, including mission-related and high depth disclosures, were not perceived accurately by participants. A failed manipulation check could be the result of an inadequate measure of the independent variable (i.e., the manipulation check question was poorly worded) or a misinterpretation of the variable. Thus, this is a limitation of the current study.

Another limitation of the Phase 1 quantitative research is that it utilised vignettes to convey scenarios in which hypothetical fundraisers were disclosing to participants (donors). Although steps were taken (i.e., piloting the survey content with major donors and fundraisers to address authenticity) to rigorously develop the vignette content, vignette-based research requires that participants imagine an experience other than their own, and sometimes participants are unable to respond from the perspective of the vignette character (Hughes & Huby, 2002). There are no

standardised procedures for developing the content included in a vignette, and no vignette can capture all possible aspects of any participant's experience. This means that even a well-developed vignette could inadvertently omit important details, which may affect the study's validity (Matza et al., 2021). In addition, participants may not have liked the use of an imaginary university and/or fundraiser or the role play nature of the experiment, which may have affected participant responses, or they may have provided socially desirable responses because the request for participation came from an institution they support, Indiana University.

The second qualitative phase of research also consisted of limitations. First, there was a lack of diversity among fundraisers who participated in the semi-structured interviews. All participants in this study were white except one, who identified as black. Although other studies have indicated that fundraisers tend to be a homogeneous group (Breeze, 2017; Shaker & Nathan, 2017), the lack of diversity in the current research may limit the expansion of knowledge related to non-white fundraisers.

Another limitation of the semi-structured interviews is that they only investigated the subjective experiences of fundraisers. Although this information was helpful to the current research by providing rich detail related to the context and environment in which self-disclosure occurs, the data does not consider the experiences of donors. That is, the phase two research investigates an interpersonal process from only one perspective. In addition, the participants may have natural tendencies to disclose (i.e., they may be more open and more willing to disclose) than fundraisers who did not choose to participate in the current research.

A limitation of most qualitative research is its lack of generalizability of findings. Although the purpose of the semi-structured interviews in the current research was to help explain the results from Phase 1 and fully answer the overall research question rather than generalise about a large population, this limitation should be noted. Similarly, qualitative research typically cannot draw causal conclusions.

A further limitation of the qualitative research is related to the chosen sampling procedures. Phase 2 utilised the chain-referral method (Bagheri & Saadati, 2015) to obtain a non-probabilistic, purposive sample of fundraisers. Limitations of the chain-referral method are that because participants are socially linked, there is a chance that they all have similar experiences and thus the data obtained could be biased.

Similarly, the findings from the semi-structed interviews were based on participants' ability and willingness to honestly describe and share their experiences utilizing self-disclosure during interactions with major donors. Participants may have provided biased or socially desirable responses to interview questions, which could have influenced the outcome of the study.

6.5 Suggestions for future research

Several of the research limitations mentioned can be addressed by future research. Table 6.1 shows the main contributions to knowledge and how they link to suggestions for future research. The overall aim of the study was to investigate what role fundraisers' self-disclosure plays in

fundraiser-major donor interactions. Results from both phases of research helped achieve this

aim, however, future research will strengthen our understanding even further.

Table 6.1: Contribution to knowledge and opportunities for future research

Contributions to knowledge	Opportunities for future research
Donors experienced increased feelings of being willing to sacrifice, incur costs and experience distress to meet the needs of a female-identifying (but not male-identifying) fundraiser. However, feelings of increased communal strength were not related to giving.	Future research is needed to investigate whether gender stereotypes or socialization affects donors' preference to receive self-disclosure from female-identifying (rather than male-identifying) fundraisers. Additional research opportunities should investigate whether increased feelings of communal strength are related to a willingness to incur financial – rather than emotional – sacrifices, costs and distress.
Tested social penetration theory's ability to predict donors' giving, and found it was effective only for donors with lower moral identity.	Additional research is needed to investigate whether self-disclosure can predict behaviour changes for more donors – beyond just those who have lower moral identity.
Fundraisers build relationships with major donors to improve donors' psychological wellbeing and meet their fundamental human need to connect with others.	Research is needed to investigate the impact of these psychologically beneficial relationships on donors' decisions to make transformational gifts, and whether these relationships improve donors' overall quality of life.
Fundraisers use self-disclosure as a relationship development tool, including to build trust with major donors, and as a strategic cultivation tactic.	Additional research is needed to explore the stage of the relationship and its impact on disclosure, further examination, and empirical testing of how trust is developed using self-disclosure, examination of the valence (positivity versus negativity) of the self-disclosures that fundraisers share with donors.

Although the current research did not expect to find gender differences between the self-

disclosures of male- and female-identifying fundraisers, some significant results occurred. More

research is needed to determine whether receiving self-disclosure from female-identifying

fundraisers are related to constructs other than communal strength, as was found in this research.

In addition, although the literature review revealed that communal strength increased some

prosocial behaviours (Mills et al., 2004), findings from the current research indicate that communal strength may not be related to giving. Additional research could help determine whether this is, in fact, the case.

The current research findings revealed that a fundraiser's self-disclosure can predict a donor's giving behaviour, however, this was only true for donors with lower moral identity. Future research should investigate whether making morality more salient either during the time of disclosure or when a donor is deciding how much to give affects the relationship between self-disclosure and giving.

Future research is needed to investigate whether gender stereotypes or socialization affects donors' preference to receive self-disclosure from female-identifying (rather than male-identifying) fundraisers. Additional research opportunities should investigate whether increased feelings of communal strength are related to a willingness to incur financial – rather than emotional – sacrifices, costs and distress.

Recent research has suggested that to be successful, fundraisers should not just consider how to meet the needs of their organizations, but rather, they should consider how to meet the psychological needs and improve the psychological health of the donors with whom they work (Edworthy et al., 2022). Findings from the current research suggest that fundraisers know this intuitively and they are picking up on unspoken cues donors send that indicate donors want to create or maintain a strong connection with fundraiser as part of the fundraising process. Additional, intentional research would strengthen these initial findings and could suggest a

paradigmatic shift away from the current relationship fundraising model to one that emphasises the positive mental state of donors and meeting their fundamental human needs, as suggested by Edworthy et al., (2022).Further research is needed to examine how fundraisers use self-disclosure to develop relationships with major donors. The current research was interested in investigating the predictive power of different self-disclosure content (for example, self-related, mission-related and high depth). Manipulation checks for the mission-related and high depth self-disclosure initially included in the Phase 1 research indicated that participants who received the mission-related and high depth treatments did not perceive the disclosures appropriately. Thus, future research should include different disclosure content to determine whether different disclosure content has different predictive power or affects the fundraiser-donor relationship in a unique way. Additional research related to self-disclosure in fundraising relationships could consider the stage of the relationship, further examination and empirical testing of how trust is developed using self-disclosure, examination of the valence (positivity versus negativity) of the self-disclosures that fundraisers share with donors.

Finally, an interesting topic for future research could investigate major donors' moral identity to understand whether moral identity plays a role in major donors' interactions with/feelings about the fundraisers with which they work. Future research could consider priming donors' feelings of morality during either the disclosure process or when making their giving decision to identify whether that that has a greater effect on donors' feelings.

6.6 Conclusion

This dissertation research achieved its aim by answering the question of what role fundraisers' self-disclosure plays in fundraiser-major donor interactions.

Six contributions to knowledge were identified, including that self-disclosure is an effective tool that fundraisers commonly use to establish, maintain, and strengthen relationships with major donors. The current research goes beyond acknowledging that these relationships are important and makes a significant contribution by describing how the relationships are formed and guided using self-disclosure.

The implications of these findings for practitioners could affect education, trainings, and support systems for practicing fundraisers as well as fundraising managers and non-profit leaders. For example, education for managers and fundraisers which increases awareness of the use of self-disclosure in relationship development to improve interactions with donors and fundraisers' performance, trainings which build fundraisers' disclosure skills to help mitigate risks in utilizing self-disclosure in the relationship development process and the development of support systems which could provide coaching and assistance, especially for female fundraisers who may face unique risks in sharing personal information with donors.

The contributions and implications of the current research helped to identify several suggestions for future research. As this was the first research to identify self-disclosure as a strategy for building relationships with donors, additional research is needed to further confirm and build

upon these findings. For example, a deeper understanding of how donors' and fundraisers' characteristics affect the disclosure process, or the development of the relationship or the fundraising process, should be examined. The current research suggests that fundraisers intuitively use self-disclosure to meet donors' psychological needs, however, additional research is needed to confirm these suggested findings.

This chapter concluded with a discussion of the limitations of the current research, including a potential research design flaw related to the use of vignettes and the possibility of bias among fundraisers who participated in the semi-structured interviews. Limitations exist in all research due to restrictions in methodology or research design and they should not undermine the contributions of the current research.

Bibliography

AFP, 2014. *Code of ethical standards.* [Online] Available at:
https://afpglobal.org/ethicsmain/code-ethical-standards [Accessed 3 November 2022].

Alborough, L., 2017. Lost in translation: A sociological study of the role of fundraisers in mediating gift giving in non-profit organisations. *International Journal of Non-profit and Voluntary Sector Marketing,* 22(4), p. e1602.

Alborough, L., 2019. *Fundraisers and the Mediated Gift: Investigating the role of fundraising in gift giving to non-profit organisations,* United Kingdom: University of Kent.

Alborough, L. and Hansen, R.K., 2023. Reframing fundraising research: The challenges and opportunities of interpretivist research practices and practitioner researchers in fundraising studies. *Journal of Philanthropy and Marketing*, 28(1), p.e1775.

Alharahsheh, H.H. and Pius, A., 2020. A review of key paradigms: Positivism VS interpretivism. *Global Academic Journal of Humanities and Social Sciences*, 2(3), pp.39-43.

Aliyu, A., Bello, M., Kasim, R. & Martin, D., 2014. Positivist and non-positivist paradigm in social science research: Conflicting paradigms or perfect partners. *Journal of Management & Sustainability,* Volume 4, p. 79.

Altman, I. & Taylor, D., 1973. *Social penetration: The development of interpersonal relationships.* Holt, Rinehart & Winston.

Altman, I., Vinsel, A. & Brown, B. B., 1981. Dialectic conceptions in social psychology: An application to social penetration and privacy regulation. *Advances in experimental social psychology,* pp. 107-160.

Andreoni, J., Rao, J. M. & Trachtman, H., 2017. Avoiding the Ask: A Field Experiment on Altruism, Empathy, and Charitable Giving. *Journal of Political Economy,* 125(3), pp. 625-653.

Anon., 1999. *Merriam-Webster's Collegiate Dictionary.* 10 ed. Merriam-Webster Incorporated.

335

Aquino, K. & Reed, A. I., 2002. The self-importance of moral identity. *Journal of personality and social psychology,* 83(6), p. 1423.

Armat, M.R., Assarroudi, A. and Rad, M., 2018. Inductive and deductive: Ambiguous labels in qualitative content analysis. *The Qualitative Report*, *23*(1).

Aron, A., Melinat, E., Aron, E.N., Vallone, R.D. and Bator, R.J., 1997. The experimental generation of interpersonal closeness: A procedure and some preliminary findings. *Personality and social psychology bulletin*, *23*(4), pp.363-377.

Axelrod, T., 2004. *Raising More Money: A Step-by-step Guide to Building Lifelong Donors.* Boylston Books Limited.

Bagheri, A. & Saadati, 2015. Exploring the effectiveness of chain referral methods in sampling hidden populations. *Indian Journal of Science and Technology,* 8(30), pp. 1-8.

Bantham, J. H. K. G. C. a. C. J. K., 2003. A perspective of partnerships based on interdependence and dialectical theory. *Journal of Business Research,* 56(4), pp. 265-274.

Baumann, J. and Le Meunier-FitzHugh, K., 2015. Making value co-creation a reality–exploring the co-creative value processes in customer–salesperson interaction. *Journal of Marketing Management*, *31*(3-4), pp.289-316.

Baumeister, R.F. and Leary, M.R., 1995. The need to belong: desire for interpersonal attachments as a fundamental human motivation. *Psychological bulletin*, *117*(3), p.497.

Beaton, E. E., LePere-Schloop, M. & Smith, R., 2021. "Whatever it takes": Sexual harassment in the context of resource dependence. *Journal of Public Administration Research and Theory,* 31(4), pp. 617-633.

Berg, J. & Clark, M., 1986. Differences in social exchange between intimate and other relationships: Gradually evolving or quickly apparent?. In: *Friendship and social interaction.* Springer, pp. 101-128.

Berg, J. H., 1987. Responsiveness and self-disclosure. In: *Self-disclosure.* Boston: Springer, pp. 101-130.

Beymer, M. R., Holloway, I. W. & Grov, C., 2018. Comparing self-reported demographic and sexual behavioral factors among men who have sex with men recruited through Mechanical Turk, Qualtrics, and a HIV/STI clinic-based sample: Implications for researchers and providers. *Archives of sexual behavior,* 47(1), pp. 133-142.

Bisel, R. S. & Adame, E. A., 2017. Post-positivist/functionalist approaches. *The international encyclopedia of organizational communication,* pp. 1-22.

Black, T. R., 1999. *Doing quantitative research in the social sciences: An integrated approach to research design, measurement and statistics.* Sage.

Boenigk, S. and Scherhag, C., 2014. Effects of donor priority strategy on relationship fundraising outcomes. *Nonprofit Management and Leadership*, *24*(3), pp.307-336.

Boer, D. et al., 2011. How shared preferences in music create bonds between people: Values as the missing link. *Personality and Social Psychology Bulletin,* 37(9), pp. 1159-1171.

Bolton, R. N., Smith, A. K. & Wagner, J., 2003. Striking the right balance: Designing service to enhance business-to-business relationships. *Journal of Service Research,* 5(4), pp. 271-291.

Braun, V. & Clarke, V., 2006. Using thematic analysis in psychology. *Qualitative research in psychology,* 3(2), pp. 77-101.

Breeze, B., 2017. *New Fundraisers.* Bristol: Policy Press.

Breeze, B., 2021. Interviewing Elite Donors: Gaining access, developing rapport and dealing with the dazzle. *VOLUNTAS: International Journal of Voluntary and Non-profit Organizations,* pp. 1-8.

Breeze, B. & Jollymore, G., 2017. Understanding solicitation: Beyond the binary variable of being asked or not being asked. *International Journal of Non-profit and Voluntary Sector Marketing,* 22(4), p. e1607.

Breeze, B. & Lloyd, T., 2013. Why Do Rich People Give?. *London: Directory of Social Change.*

Burnett, K., 1992. *Relationship Fundraising.* London: White Lion Press.

Bruk, A., Scholl, S.G. and Bless, H., 2018. Beautiful mess effect: Self–other differences in evaluation of showing vulnerability. *Journal of personality and social psychology*, *115*(2), p.192.

Burnett, K., 2002. *Relationship fundraising: A donor-based approach to the business of raising money.* John Wiley & Sons.

Burk, P., 2008. *Donor Centered Fund-raising*. Cygnus Applied Research.

Buteau, E., Martin, H. & Loh, C., 2019. *Crucial donors: How major individual givers can best support non-profits.* Centre for Effective Philanthropy.

Cantarelli, P., Belle, N. & Longo, F., 2020. Exploring the motivational bases of public mission-driven professions using a sequential-explanatory design. *Public Management Review ,* 22(10), pp. 1535-1559.

Carbone, E., Loewenstein, G., Scopelliti, I. and Vosgerau, J., 2021. He Said, She Said: Gender Differences in Disclosure. *Advances in Consumer Research*, *49*, pp.871-872.

Carpenter, A. & Greene, K., 2015. Social penetration theory. *The international encyclopedia of interpersonal communication,* pp. 1-4.

Castillo, E. A. & Jones, J. A., 2020. The paradox of growth and giving: Critical case sampling to illuminate the catalytic potential of an underresearched phenomenon. *International Journal of Non-profit and Voluntary Sector Marketing,* 25(1), p. e1648.

Caton, C. S., 1999. Preference for Prestige: Commentary on the Behaviour of Universities and their Benefactors. *Canadian Journal of Higher Education,* 29(2/3), pp. 145-173.

Chapman, C., Louis, W., Masser, B. & Thomas, E., 2022. Charitable Triad Theory: How donors, beneficiaries, and fundraisers influence charitable giving. *Psychology & Marketing,* 39(9), pp. 1826-1848.

Chaudoir, S.R. and Fisher, J.D., 2010. The disclosure processes model: understanding disclosure decision making and postdisclosure outcomes among people living with a concealable stigmatized identity. *Psychological bulletin*, *136*(2), p.236.

Chronical.com. (2022). *Major private gifts to higher education* [online]. Available from: https://www.chronicle.com/article/major-private-gifts-to-higher-education/ [accessed 27 September 2022]

Clark, C., 2009. How storytelling and branding techniques can be used to create an effective fundraising communications programme. *Journal of Communication in Healthcare,* 2(1), pp. 47-53.

Clarke, C. A., 2009. *Storytelling for grantseekers: A guide to creative non-profit fundraising.* John Wiley & Sons.

Cluff, A., 2009. Dispelling the myths about major donor fundraising. *International Journal of Non-profit and Voluntary Sector Marketing,* 14(4), pp. 371-377.

Cole, J.C., 2008. How to deal with missing data. *Best practices in quantitative methods*, pp.214-238.

Collins, N. L. & Miller, L. C., 1994. Self-disclosure and liking: a meta-analytic review. *Psychological bulletin,* 116(3), p. 457.

Colvin, C. R. & Longueuil, D., 2001. Eliciting self-disclosure: The personality and behavioral correlates of the opener scale. *Journal of Research in Personality,* 35(2), pp. 238-246.

Connelly, L. M., 2016. Cross-sectional survey research. *Medsurg nursing,* 25(5), p. 369.

Conley, A. and Shaker, G.G., 2021. Understanding Donor Motivation. *Fundraising Principles for Faculty and Academic Leaders*, pp.67-86.

Constant, D., Kiesler, S. and Sproull, L., 1994. What's mine is ours, or is it? A study of attitudes about information sharing. *Information systems research*, *5*(4), pp.400-421.

Corden, A. & Sainsbury, R., 2006. Exploring 'quality': Research participants' perspectives on verbatim quotations. *International Journal of Social Research Methodology,* 9(2), pp. 97-110.

Couper, M. P., Tourangeau, R. & Kenyon, K., 2004. Picture this! Exploring visual effects in web surveys. *Public Opinion Quarterly,* 68(2), pp. 255-266.

Cozby, P. C., 1973. Self-disclosure: a literature review. *Psychological bulletin,* 79(2), p. 73.

Creswell, J. & Clark, V., 2017. *Designing and conducting mixed methods research.* Sage publications.

Creswell, J. & Plano Clark, V., 2018. *Designing and Conducting Mixed Methods Research.* 3rd ed. Sage Publications.

Creswell, J. W., 2009. *Research design: Qualitative, quantitative, and mixed methods approaches.* 3rd ed. Sage Publications, Inc..

Cropanzano, R. & Mitchell, M. S., 2005. Social exchange theory: An interdisciplinary review. *Journal of management,* 31(6), pp. 874-900.

Crosby, L. A., Evans, K. R. & Cowles, D., 1990. Relationship quality in services selling: an interpersonal influence perspective. *Journal of marketing,* 54(3), pp. 68-81.

Croteau, J. D. & Smith, Z. A., 2011. *Making the case for leadership: Profiles of chief advancement officers in higher education.* Rowman & Littlefield Publishers.

Cuevas, J., Julkunen, S. & Gabrielsson, M., 2015. Power symmetry and the development of trust in interdependent relationships: The mediating role of goal congruence. *Industrial Marketing Management,* Volume 48, pp. 149-159.

Current Term Enrollment Estimates National Student Clearinghouse Research Center.

Dale, E. J., 2017. Fundraising as women's work? Examining the profession with a gender lens. *International Journal of Non-profit and Voluntary Sector Marketing,* 22(4), p. e1605.

Dale, E. J. & Breeze, B., 2021. Making the tea or making it to the top? How gender stereotypes impact women fundraisers' careers. *Voluntary Sector Review,* 13(1), pp. 19-32.

Derlega, V. J., W. & Greene, K., 2008. Self-disclosure and starting a close relationship. In: S. S, W. A & H. J, eds. *Handbook of relationship initiation.* pp. 153-174.

Derlega, V. J., Winstead, B. A., Mathews, A. & Braitman, A. L., 2008. Why does someone reveal highly personal information? Attributions for and against self-disclosure in close relationships. *Communication Research Reports,* 25(2), pp. 115-130.

DiCicco-Bloom, B. & Crabtree, B. F., 2006. The qualitative research interview. *Medical education,* 40(4), pp. 314-321.

Dindia, K. & Allen, M., 1992. Sex differences in self-disclosure: a meta-analysis. *Psychological bulletin,* 112(1), p. 106.

Dindia, K. & Canary, a. D. J., 1993. Definitions and theoretical perspectives on maintaining relationships. *Journal of social and personal relationships,* 10(2), pp. 163-173.

Dindia, K., Fitzpatrick, M. A. & Kenny, D. A., 1997. Self-disclosure in spouse and stranger interaction: A social relations analysis. *Human Communication Research,* 23(3), pp. 388-412.

Dittmar, K., 2014. *Money in Politics with a Gender Lens.* National Council for Research on Women (in collaboration with the Center for American Women and Politics and the Center for Responsive Politics.

Drezner, N.D., 2018. Philanthropic mirroring: Exploring identity-based fundraising in higher education. *The Journal of Higher Education*, *89*(3), pp.261-293.

Drollinger, T., 2018. Using active empathetic listening to build relationships with major-gift donors. *Journal of Non-profit & Public Sector Marketing ,* 30(1), pp. 37-51.

Duck, S., 1994. *Meaningful relationships: Talking, sense, and relating.* Sage Publications, Inc.

Dunn, J. & Schweitzer, M., 2005. Feeling and believing: the influence of emotion on trust. *Journal of personality and social psychology,* 88(5), p. 736.

Dwyer, F. R., Schurr, P. H. & Oh, S., 1987. Developing buyer-seller relationships. *Journal of marketing,* 51(2), pp. 11-27.

Eckerd, S. et al., 2021. On making experimental design choices: Discussions on the use and challenges of demand effects, incentives, deception, samples, and vignettes. *Journal of Operations Management,* 67(2), pp. 261-275.

Edwards, K. D. & Konold, T. R., 2020. Moderated mediation analysis: A review and application to school climate research. *Practical Assessment, Research, and Evaluation,* 25(1), p. 5.

Edworthy, K., Sargeant, A. & Shang, J., 2022. *Relationship Fundraising 3.0: A Review, Assessment & Experimental Results,* Institute for Sustainable Philanthropy.

Ellemers, N., 2018. Gender stereotypes. *Annual review of psychology*, *69*, pp.275-298.

Emerson, Richard M., 1976. Social Exchange Theory. *Annual Review of Sociology*, 2, pp. 335–62.

Erikson, E. H., 1964. *Childhood and society.* Oxford, England: Nornton.

Fehr, B., 1999. Laypeople's conceptions of commitment. *Journal of personality and social psychology*, *76*(1), p.90.

File, K. M. & Prince, R. A., 1995. Cause-related marketing, philanthropy, and the arts. *Non-profit management and leadership,* 5(3), pp. 249-260.

Flick, U., Kardoff, E. v. & Ines Steinke, e., 2004. *A companion to qualitative research.* s.l.:Sage.
Foundation, G. U., 2022. *Giving USA 2022: The annual report on philanthropy for the year 2021.* Giving USA Foundation.

Fowler Jr, F. J., 2014. *Survey research methods.* Sage.

Galletta, A., 2018. *Mastering the semi-structured interview and beyond: From research design to analysis and publication.* 18 ed. NYU Press.

Geiger, S. and Turley, D., 2005. Personal selling as knowledge-based activity: communities of practice in sales. *Irish Journal of Management*, *26*(1), pp.61-70.

Gibson, K. R., 2018. Can I tell you something? How disruptive self-disclosure changes who "we" are. *Academy of Management Review,* 43(4), pp. 570-589.

Giving USA Foundation. (2022). Giving USA 2022: The annual report on philanthropy for the year 2021. Giving USA Foundation.

Gore, J. S., Cross, S. E. & Morris, M. L., 2006. Let's be friends: Relational self-construal and the development of intimacy. *Personal Relationships,* 13(1), pp. 83-102.

Gouldner, A. W., 1960. The norm of reciprocity: A preliminary statement. *American sociological review,* pp. 161-178.

Grant, C. & Osanloo, A., 2014. Understanding, selecting, and integrating a theoretical framework in dissertation research: Creating the blueprint for your "house". *Administrative issues journal: connecting education, practice, and research,* 4(2), pp. 12-26.

Gray, A. W., Parkinson, B. & Dunbar, R. I., 2015. Laughter's influence on the intimacy of self-disclosure. *Human Nature,* 26(1), pp. 28-43.

Greenberg, M. A., Wortman, C. B. & Stone, A. A., 1996. Emotional expression and physical health: Revising traumatic memories or fostering self-regulation?. *Journal of Personality and social Psychology,* 71(3), p. 588.

Greene, K., Derlega, V. J. & Mathews, A., 2006. Self-disclosure in personal relationships. In: *The Cambridge handbook of personal relationships.* pp. 409-427.

Groves, R.M. and Peytcheva, E., 2008. The impact of nonresponse rates on nonresponse bias: a meta-analysis. *Public opinion quarterly*, *72*(2), pp.167-189.

Guba, E. G. & Lincoln, Y. S., 1994. Competing paradigms in qualitative research. *Handbook of qualitative research,* Volume 2, pp. 163-194.

Guba, E.G. and Lincoln, Y.S., 1981. *Effective evaluation: Improving the usefulness of evaluation results through responsive and naturalistic approaches*. Jossey-Bass.

Guest, G., Bunce, A. & Johnson, L., 2006. How many interviews are enough? An experiment with data saturation and variability. *Field methods,* 18(1), pp. 59-82.

Hansen, J. D. & Riggle, R. J., 2009. Ethical salesperson behavior in sales relationships. *Journal of personal selling & sales management,* 29(2), pp. 151-166.

Hartsook, R. F. & Sargeant, A., 2010. Major Gift Fundraising. In: *Funhdraising Principles and Practice.* John Wiley & Sons, pp. 351-376.

Hawkes, J. & Marsh, W., 2005. *Discovering Statistics.* Hawkes Pub.

Hayes, A.F., 2017. *Introduction to mediation, moderation, and conditional process analysis: A regression-based approach*. Guilford publications.

Hayes, A. F., 2018. *Introduction to Mediation, Moderation and Conditional Process Analysis.* 2 ed. The Guilford Press.

Hayes, A. F. & Scharkow, M., 2013. The relative trustworthiness of inferential tests of the indirect effect in statistical mediation analysis: does method really matter?. *Psychological science,* 24(10), pp. 1918-27.

Haytko, D., 2004. Firm-to-firm and interpersonal relationships: perspectives from advertising agency account managers. *Journal of the Academy of Marketing Science,* 32(3), pp. 312-328.

Heale, R. and Twycross, A., 2015. Validity and reliability in quantitative studies. *Evidence-based nursing*, *18*(3), pp.66-67.

Hennink, M. a. B. N. K., 2021. Sample sizes for saturation in qualitative research: A systematic review of empirical tests. *Social Science & Medicine,* p. 114523.

Herzog, P. S. & Price, H. E., 2016. *American generosity: Who gives and why.* Oxford University Press.

Hill, C.T. and Stull, D.E., 1987. Gender and self-disclosure: Strategies for exploring the issues. *Self-disclosure: Theory, research, and therapy*, pp.81-100.

Holt-Lunstad, J., 2018. Fostering social connection in the workplace. *American Journal of Health Promotion*, *32*(5), pp.1307-1312.

Homans, G. C., 1958. Social behavior as exchange. *American journal of sociology,* 63(6), pp. 597-606.

Hook, M.K., Gerstein, L.H., Detterich, L. and Gridley, B., 2003. How close are we? Measuring intimacy and examining gender differences. *Journal of Counseling & Development*, *81*(4), pp.462-472.

Howell, K. E., 2013. *An introduction to the philosophy of methodology.* Sage.
Hughes, R. & Huby, M., 2002. The application of vignettes in social and nursing research. *Journal of advanced nursing,* 37(4), pp. 382-6.

Hughes, R. and Huby, M., 2004. The construction and interpretation of vignettes in social research. *Social work and social sciences review*, *11*(1), pp.36-51.

Igo, L. B., Kiewra, K. A. & Bruning, R., 2008. Individual differences and intervention flaws: A sequential explanatory study of college students' copy-and-paste note taking. *Journal of Mixed Methods Research,* 2(2), pp. 149-168.

Israel, G. D., 1992. *Determining sample size,* Gainesville, FL: University of Florida.

Ivankova, N. & Stick, S., 2007. Students' persistence in a distributed doctoral program in educational leadership in higher education: A mixed methods study. *Research in Higher Education,* 48(1), pp. 93-135.

Ivankova, N. V., Creswell, J. W. & Stick, S. L., 2006. Using mixed-methods sequential explanatory design: From theory to practice. *Field methods,* 18(1), pp. 3-20.

Jackson, S. L., 2015. *Research methods and statistics: A critical thinking approach.* Cengage Learning.

Johnson, R. B., Onwuegbuzie, A. J. & Turner, L. A., 2007. Toward a definition of mixed methods research. *Journal of mixed methods research,* 1(2), pp. 112-133.

Jourard, S.M., 1961. Self-disclosure patterns in British and American college females. *The Journal of Social Psychology*, *54*(2), pp.315-320.

Jourard, S. M. & Lasakow, P., 1958. Some factors in self-disclosure. *The Journal of Abnormal and Social Psychology,* 56(1), p. 91.

Jourard, S.M. and Richman, P., 1963. Factors in the self-disclosure inputs of college students. *Merrill-Palmer Quarterly of Behavior and Development*, *9*(2), pp.141-148.

Kallio, H., Pietilä, A., Johnson, M. & Kangasniemi, M., 2016. Systematic methodological review: developing a framework for a qualitative semi-structured interview guide. *Journal of advanced nursing,* 72(12), pp. 2954-65.

Kardas, M., Kumar, A. and Epley, N., 2022. Overly shallow?: Miscalibrated expectations create a barrier to deeper conversation. *Journal of Personality and Social Psychology*, *122*(3), p.367.

Kang, S.K. and Bodenhausen, G.V., 2015. Multiple identities in social perception and interaction: Challenges and opportunities. *Annual review of psychology*, *66*, pp.547-574.

Kaufman, B., 2003. Stories that sell, stories that tell: effective storytelling can strengthen an organization's bonds with all of its stakeholders. *Journal of Business Strategy,* 24(2), pp. 11-16.

Kennedy, J. A., Kray, L. J. & Ku, G., 2017. A social-cognitive approach to understanding gender differences in negotiator ethics: The role of moral identity. *Organizational Behavior and Human Decision Processes,* Volume 138, pp. 28-44.

Knowles, P. & Gomes, R., 2009. Building relationships with major-gift donors: A major-gift decision-making, relationship-building model. *Journal of Non-profit & Public Sector Marketing,* 21(4), pp. 384-406.

Koponen & Julkunen, 2022. Development of long-term realtionships: the role of self-disclosure and relational cost/benefit evalutaion. *European Journal of Marketing,* 56(13), pp. 194-234.

Korsgaard, M. A., Meglino, B. M., Lester, S. W. & Jeong, S. S., 2010. Paying you back or paying me forward: understanding rewarded and unrewarded organizational citizenship behavior. *Journal of applied psychology,* 95(2), p. 277.

Laurenceau, J., Rivera, L., Schaffer, A. & Pietromonaco, P., 2004. Intimacy as an interpersonal process: Current status and future directions. *Handbook of closeness and intimacy,* pp. 71-88.

LePere-Schloop, M. & Beaton, E., 2022. *Speaking Truth to Power in Fundraising: A Toolkit.* Available at SSRN.

Levine, T. R., Kim, S. Y. & Ferrara, M., 2010. Social exchange, uncertainty, and communication content as factors impacting the relational outcomes of betrayal. *Human communication,* 13(4), pp. 303-318.

Lincoln, Y., Lynham, S. & Guba, E., 2011. Paradigmatic controversies, contradictions, and emerging confluences, revisited. *The Sage handbook of qualitative research,* 4(2), pp. 97-128.

Love, H.R. and Corr, C., 2022. Integrating without quantitizing: two examples of deductive analysis strategies within qualitatively driven mixed methods research. *Journal of mixed methods research*, *16*(1), pp.64-87.

Lysakowski, L., 2013. Non-profit essentials: The development plan. John Wiley & Sons.

Mackenzie, N. & Knipe, S., 2006. Research dilemmas: Paradigms, methods and methodology. *Issues in educational research,* 16(2), pp. 193-205.

MacQuillin, I., Sargeant, A. and Shang, J., 2016. Relationship Fundraising.

Madden, S., Harrison, V. and Vafeiadis, M., 2022. Relational care in communication as the basis of nonprofit fundraising: Theorizing professional ethics based in stewardship and ethics of care. *Journal of Philanthropy and Marketing*.

Maner, J.K., DeWall, C.N., Baumeister, R.F. and Schaller, M., 2007. Does social exclusion motivate interpersonal reconnection? Resolving the" porcupine problem.". *Journal of personality and social psychology*, *92*(1), p.42.

Markus, H., 1977. Self-schemata and processing information about the self. *Journal of personality and social psychology*, *35*(2), p.63.

Marshall, T.C., 2008. Cultural differences in intimacy: The influence of gender-role ideology and individualism—collectivism. *Journal of Social and Personal Relationships*, *25*(1), pp.143-168.

Matza, L. S. et al., 2021. Vignette-based utilities: usefulness, limitations, and methodological recommendations. *Value in Health,* 24(6), pp. 812-821.

McDonald, K., Scaife, W. & Smyllie, S., 2011. Give and take in major gift relationships. *Australian Journal of Social Issues,* 46(2), pp. 163-182.

McGregor, S. L. & Murnane, J. A., 2010. Paradigm, methodology and method: Intellectual integrity in consumer scholarship. *International journal of consumer studies,* 34(4), pp. 419-427.

McLoughlin, J., 2017. Advantage, meaning and pleasure: Reframing the interaction between major-gift fundraisers and philanthropists. *International Journal of Voluntary Sector Marketing,* 22(4), p. e1600.

Mehl, M.R., Vazire, S., Holleran, S.E. and Clark, C.S., 2010. Eavesdropping on happiness: Well-being is related to having less small talk and more substantive conversations. *Psychological science*, *21*(4), pp.539-541.

Merchant, A., Ford, J. B. & Sargeant, A., 2010. Charitable organizations' storytelling influence on donors' emotions and intentions. *Journal of Business Research,* 63(7), pp. 754-762.

Milek, A., Butler, E.A., Tackman, A.M., Kaplan, D.M., Raison, C.L., Sbarra, D.A., Vazire, S. and Mehl, M.R., 2018. "Eavesdropping on happiness" revisited: A pooled, multisample replication of the association between life satisfaction and observed daily conversation quantity and quality. *Psychological science*, *29*(9), pp.1451-1462.

Mills, J., & Clark, M. S. (1982). Exchange and communal relationships. In L. Wheeler (Ed.), Review of Personality and Social Psychology (Vol. 3, pp. 121–144). Beverly Hills, CA: Sage.

Mills, J., Clark, M. S., F. T. E. & Johnson, M., 2004. Measurement of communal strength. *Personal relationships,* 11(2), pp. 213-230.

Molm, L. D., 2006. The social exchange framework. *Contemporary social psychological theories,* pp. 24-45.

Morgan, R. M. & Hunt, S. D., 1994. The commitment-trust theory of relationship marketing. *Journal of marketing,* 58(3), pp. 20-38.

Murry Jr., J. & Heide, J., 1998. Managing promotion program participation within manufacturer-retailer relationships. *Journal of marketing,* 62(1), pp. 58-68.

Myers, T.A., 2011. Goodbye, listwise deletion: Presenting hot deck imputation as an easy and effective tool for handling missing data. *Communication methods and measures*, *5*(4), pp.297-310.

Nagaraj, A., 2015. *Gifted and talented: What makes a top fundraiser in the age of venture philanthropy,* Washington, D.C.: Education Advancement Board.

Nazim, A. & Ahmad, S., 2013. A comparison between Ordinary Least Square (OLS) And Structural Equation Modeling (SEM) methods in estimating the influencial factors of 8th grades student's mathematics achievement in Malaysia. *International Journal of Scientific & Engineering Research,* 4(7), pp. 717-722.

Nguyen, M., Bin, Y. S. & Campbell, A., 2012. Comparing online and offline self-disclosure: A systematic review. *Cyberpsychology, Behavior, and Social Networking,* 15(2), pp. 103-11.

Nwakpuda, E.I., 2020. Major Donors and higher education: are STEM donors different from other donors? *Nonprofit and Voluntary Sector Quarterly*, *49*(5), pp.969-988.

Nyman, J., Pilbeam, C., Baines, P. & Maklan, S., 2018. Identifying the roles of university fundraisers in securing transformational gifts: lessons from Canada. *Studies in Higher Education,* 43(7), pp. 1227-1240.

Omarzu, J., 2000. A disclosure decision model: Determining how and when individuals will self-disclose. *Personality and Social Psychology Review,* 4(2), pp. 174-185.

Osili, U., Clark, C. & Bergdoll, J., 2021. *The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households.*

Osili, U., Clark, C., St Claire, M. & Bergdoll, J., 2019. *The US Trust® study of high net worth philanthropy.*

Panhwar, A. H., Ansari, S. & Shah, A. A., 2017. Post-positivism: An effective paradigm for social and educational research. *International Research Journal of Arts & Humanities,* p. 45.

Park, Y.S., Konge, L. and Artino, A.R., 2020. The positivism paradigm of research. *Academic Medicine*, *95*(5), pp.690-694.

Pennington, N., 2021. Extending social penetration theory to Facebook. *The Journal of Social Media in Society,* 10(2), pp. 325-343.

Perry, R. D. & Schreifels, J., 2014. *It's Not Just about the Money: How to Build Authentic Major Donor Relationships.* Veritus Group.

Pietromonaco, P.R. and Collins, N.L., 2017. Interpersonal mechanisms linking close relationships to health. *American Psychologist*, *72*(6), p.531.

Pitman, M. A., 2008. *Ask Without Fear!: A Simple Guide to Connecting Donors with what Matters to Them Most.* Fundraisingcoach. com.

Preacher, K. J., Rucker, D. D. & Hayes, A. F., 2007. Addressing moderated mediation hypotheses: Theory, methods, and prescriptions. *Multivariate behavioral research,* 42(1), pp. 185-227.

Prince, R.A. and File, K., 1994. *The seven faces of philanthropy: A new approach to cultivating major donors*. San Francisco: Jossey-Bass.

Ragsdale, J. D., 1995. Quality communication in achieving fundraising excellence. In: *Communicating effectively with major donors.* pp. 17-31.

Rebetak, F. and Bartosova, V., 2019. Theoretical background of fundraising for non-profit organisations. *Economic and Social Development: Book of Proceedings*, pp.257-265.

Redmond, M., 2015. *Social exchange theory.* Iowa State University.

Reed, A. & Aquino, K. F., 2003. Moral identity and the expanding circle of moral regard toward out-groups. *Journal of personality and social psychology,* 84(6), p. 1270.

Reis, H. & Shaver, P., 1988. Intimacy as an interpersonal process. In: F. S. Duck, ed. *Handbook of Personal Relationships.* pp. 367-389.

Rooney, P., 2018. "The Growth in Total Household Giving Is Camouflaging a Decline in Giving by Small and Medium Donors: What Can We Do about It?. *Non-profit Quarterly*, Fall, Volume 13, p. 44–49.

Rooney, P. M. & Frederick, H. K., 2007. *Bank of America Study of High Net-Worth Philanthropy–Portraits of Donors,* s.l.: The Center on Philanthropy at Indiana University and Bank of America Philanthropic Management.

Rosen, L. D., Cheever, N. A., Cummings, C. & Felt, J., 2008. The impact of emotionality and self-disclosure on online dating versus traditional dating. *Computers in Human Behavior,* 24(5), pp. 2124-2157.

Rossignac-Milon, M. and Higgins, E.T., 2018. Epistemic companions: Shared reality development in close relationships. *Current opinion in psychology*, *23*, pp.66-71.

Rosso, H. A., 2003. A philosophy of fundraising. In: *Hank Rosso's achieving excellence in fund raising.* John Wiley & Sons, pp. 14-20.

Rousseau, D. M., Sitkin, S. B., Burt, R. S. & Camerer, C., 1998. Not so different after all: A cross-discipline view of trust. *Academy of management review,* 23(3), pp. 393-404.

Rusbult, C.E. and Buunk, B.P., 1993. Commitment processes in close relationships: An interdependence analysis. *Journal of social and personal relationships*, *10*(2), pp.175-204.

Ryan, R. M. & Deci, E. L., 2000. Self-determination theory and the facilitation of intrinsic motivation, social development, and well-being. *American psychologist,* 55(1), p. 68.

Sargeant, A., Eisenstein, A. and Kottasz, R., 2015. Major gift fundraising: Unlocking the potential for smaller nonprofits.

Sargeant, A., Ford, J. B. & West, D. C., 2006. Perceptual determinants of non-profit giving behavior. *Journal of business research,* 59(2), pp. 155-165.

Sargeant, A. & Lee, S., 2004. Donor trust and relationship commitment in the UK charity sector: The impact on behavior. *Non-profit and Voluntary Sector Quarterly,* 33(2), pp. 185-202.

Sargeant, A. & MacQuillin, I., 2020. Relationship Fundraising 2.0: Lessons from social psychology. In: *The Routledge Companion to Non-profit Management .* pp. 377-388.

Sargeant, A. & Shang, J., 2010. *Fundraising principles and practice* (Vol. 17). John Wiley & Sons.

Sargeant, A. & Woodliffe, L., 2007. Building donor loyalty: The antecedents and role of commitment in the context of charity giving. *Journal of Non-profit & Public Sector Marketing,* 18(2), pp. 47-68.

Satterwhite, C. & Cedja, B., 2005. Higher education fund raising: What is the president to do?. *International Journal of Educational Advancement,* 5(4), pp. pp.333-342.

Saunders, M., Lewis, P. & Thornhill, A., 2007. *Research methods: Business Students.* 4th ed. England: Pearson Education Limited.

Schakett, T., Flaschner, A., Gao, T. (. & El-Ansary, A., 2011. Effects of Social Bonding in Business-to-Business Relationships, Journal of Relationship Marketing. *Journal of Relationship Marketing,* 10(4), pp. 264-280.

Schafer, J.L. and Graham, J.W., 2002. Missing data: our view of the state of the art. *Psychological methods*, *7*(2), p.147.

Schervish, P. G., 2005. Major donors, major motives: The people and purposes behind major gifts. *New directions for philanthropic fundraising,* 2005(47), pp. 59-87.

Schindler, L. & Burkholder, G., 2014. A mixed methods examination of the influence of dimensions of support on training transfer. *Journal of Mixed Methods Research,* 10(3), pp. 292-310.

Schoonenboom, J. and Johnson, R.B., 2017. How to construct a mixed methods research design. *Kolner Zeitschrift fur Soziologie und Sozialpsychologie*, *69*(Suppl 2), p.107.

Shaffer, D. R., Pegalis, L. J. & Cornell, D. P., 1992. Gender and self-disclosure revisited: Personal and contextual variations in self-disclosure to same-sex acquaintances. *The Journal of social psychology,* 132(3), pp. 307-315.

Shaker, G. G. & Nathan, S. K., 2017. Understanding higher education fundraisers in the United States. *International Journal of Non-profit and Voluntary Sector Marketing,* 22(4), p. e1604.

Shaker, G.G. and Nelson, D., 2022. A grounded theory study of major gift fundraising relationships in US higher education. *Nonprofit and voluntary sector quarterly*, *51*(5), pp.1054-1073.

Shang, J., Reed, A., Sargeant, A. & Carpenter, K., 2020. Marketplace donations: The role of moral identity discrepancy and gender. *Journal of Marketing Research,* 57(2), pp. 375-393.

Sheldon, P., 2013. Examining gender differences in self-disclosure on Facebook versus face-to-face. *The Journal of Social Media in Society*, *2*(1).

Silverman, D., 2016. *Qualitative Research.* Sage.

Skarmeas, D. & Shabbir, H. A., 2011. Relationship quality and giving behaviour in the UK fundraising sector: Exploring the antecedent roles of religiosity and self-construal. *European Journal of Marketing ,* Volume May 31.

Skilling, K. & Stylianides, G. J., 2020. Using vignettes in educational research: a framework for vignette construction. *International Journal of Research & Method in Education,* 43(5), pp. 541-556.

Slepian, M.L. and Moulton-Tetlock, E., 2019. Confiding secrets and well-being. *Social Psychological and Personality Science*, *10*(4), pp.472-484.

Smith, J. A., 2015. Qualitative psychology: A practical guide to research methods. In: *Qualitative psychology.* pp. 1-312.

Smith, S.A. and Brunner, S.R., 2017. To reveal or conceal: Using communication privacy management theory to understand disclosures in the workplace. *Management Communication Quarterly*, *31*(3), pp.429-446.

Sprecher, S. & Hendrick, S. S., 2004. Self-disclosure in intimate relationships: Associations with individual and relationship characteristics over time. *Journal of Social and Clinical Psychology,* 23(6), pp. 857-877.

Sprecher, S. & Treger, S., 2015. The benefits of turn-taking reciprocal self-disclosure in get-acquainted interactions. *Personal Relationships,* 22(3), pp. 460-475.

Sprecher, S. et al., 2013. Taking turns: Reciprocal self-disclosure promotes liking in initial interactions. *Journal of Experimental Social Psychology,* 49(5), pp. 860-866.

Sürücü, L. and Maslakci, A., 2020. Validity and reliability in quantitative research. *Business & Management Studies: An International Journal*, *8*(3), pp.2694-2726.

Swaminathan, V., Page, K. & Gürhan-Canli, Z., 2007. "My" brand or "our" brand: The effects of brand relationship dimensions and self-construal on brand evaluations. *Journal of consumer research,* 34(2), pp. 248-259.

Tang, J.-H. & Wang, C.-C., 2012. Self-disclosure among bloggers: Re-examination of social penetration theory. *Cyberpsychology, behavior, and social networking,* 15(5), pp. 245-50.

Tashakkori, A. & Teddlie, C., 2003. Issues and dilemmas in teaching research methods courses in social and behavioural sciences: US perspective. *International journal of social research methodology,* 6(1), pp. 61-77.

Taylor, D.A., Wheeler, L. and Altman, I., 1973. Self-disclosure in isolated groups. *Journal of Personality and Social Psychology*, *26*(1), p.39.

Tempel, E., ed., 2010. *Hank Rosso's achieving excellence in fund raising.* John Wiley & Sons.

Tolstedt, B. E. & Stokes, J. P., 1984. Self-disclosure, intimacy, and the depenetration process. *Journal of Personality and Social Psychology,* 46(1), p. 84.

Tuli, F., 2010. The basis of distinction between qualitative and quantitative research in social science: Reflection on ontological, epistemological and methodological perspectives. *Ethiopian Journal of Education and Sciences,* 6(1).

Venkatesh, V., Brown, S. A. & Sullivan, Y., 2016. Guidelines for conducting mixed-methods research: An extension and illustration. *Journal of the AIS,* 17(7), pp. 435-495.

Waters, R.D., 2008. Applying relationship management theory to the fundraising process for individual donors. *Journal of Communication Management*, *12*(1), pp.73-87.

Waters, R. D., 2011. Increasing fundraising efficiency through evaluation: Applying communication theory to the non-profit organization—donor relationship. *Non-profit and Voluntary Sector Quarterly,* 40(3), pp. 458-475.

Weinstein, S. & Barden, P., 2017. *The complete guide to fundraising management.* John Wiley & Sons.

Wieselquist, J., Rusbult, C.E., Foster, C.A. and Agnew, C.R., 1999. Commitment, pro-relationship behavior, and trust in close relationships. *Journal of personality and social psychology*, *77*(5), p.942.

Wiseman, H., 2017. The quest for connection in interpersonal and therapeutic relationships. *Psychotherapy Research*, *27*(4), pp.469-487.

Worth, M. J., 2015. *Fundraising: Principles and practice.* SAGE Publications.

Worth, M. J. & Asp, J. W., 1994. *The Development Officer in Higher Education: Toward an Understanding of the Role. ASHE-ERIC Higher Education Report No. 4,* Washington, D.C.: ERIC Clearinghouse on Higher Education.

Zhang, J. Z., Watson Iv, G. F., Palmatier, R. W. & Dant, R. P., 2016. Dynamic relationship marketing. *Journal of marketing,* 80(5), pp. 53-75.

Appendix

Appendix 1. Faculty of Business Research Ethics Committee approval letter

Date: 01 June 2018

Dear Deanna,

Ethical Approval Application No: FREIC1718.22
Title: Self-disclosure in fundraising relationships

Thank you for your application to the Faculty Research Ethics & Integrity Committee (FREIC) seeking ethical approval for your proposed research.

The committee has considered your revised application and is fully satisfied that the project complies with Plymouth University's ethical standards for research involving human participants.

Approval is for the duration of the project. However, please resubmit your application to the committee if the information provided in the form alters or is likely to alter significantly.

The FREIC members wish you every success with your research.

Yours sincerely
(*Sent as email attachment*)

Dr James Benhin
Chair
Faculty Research Ethics & Integrity Committee
Faculty of Business

Appendix 2. Phase 2 participant recruitment materials

Example of text for email outreach:

A colleague of mine is currently pursuing a PhD through the University of Plymouth (UK). This research investigates how fundraisers build strong relationships with major donors, particularly when fundraisers and donors are talking one-on-one and getting to know each other. Specifically, the researcher is interested in how, when, and why major gift fundraisers share information about themselves with major donors in the process of building strong fundraising relationships. A study information sheet is attached that describes the project in greater detail.

As part of this project, the researcher is searching for participants who fit the following criteria:

- Current, full-time fundraiser who works primarily with major donors (i.e., Major Gift Officer, Director of Development, etc.)
- Working in higher education for at least 3 years
- Managing a portfolio of major donors
- Experience cultivating and soliciting gifts from major donors of $10k+

Participants will:

- Read the attached study information sheet
- Fill out a 2-minute online questionnaire (sent separately) indicating consent to participate in the study and collecting brief demographic information
- Participate in a Zoom interview with the researcher (lasting ~1.5 hours)

Interviews will be confidential and all identifiable information used after data collection and analysis in reports, publications or other materials will be anonymized or removed. More details about confidentiality are included in the study information sheet.

Finally, if you're interested in participating, the next steps will be:

- To respond to this message and let the researcher know!
- To read the attached study information sheet
- To schedule a time for you and the researcher to meet for the Zoom interview (~1.5 hours)
- To fill out a brief online survey (2 minutes), which the researcher will send you separately

The researcher is copied on this email. Please respond directly to her if you are interested.

Thanks so much for your consideration and hope to see you soon,

Phase 2 study information sheet

Self-Disclosure in Major Gift Fundraising Relationships

You have been invited to be part of the research project, Self-Disclosure in Major Gift Fundraising Relationships. Please read this information sheet to find out more about the research and why it is being conducted.

About the researcher
RESEARCHER NAME is a PhD candidate at the University of Plymouth (UK).

What the research is about
The purpose of this research project is to better understand the ways in which major gift fundraisers and major donors share information about themselves and get to know each other during the fundraising process. Topics will explore what type of information is shared, when it is shared, and why.

You were selected as a possible participant because you are a fundraiser who works with major donors in a higher education setting. Please read this information sheet carefully and ask any questions before agreeing to be in the study.

How information will be gathered
If you agree to be in the study, you will do the following things:
- Participate in one private interview with the researcher. The interview will be conducted via Zoom and is expected to take 1-2 hours.
- The interview will be recorded. You will be asked to answer questions about how you build relationships with major donors, the types of information you share, your thought process behind when or whether you choose to share information and the impact of sharing information on your relationship with donors.

Risks and benefits
You will be asked to discuss personal experiences during the fundraising process that you may not have discussed before. This could lead to some uncertainty during the interview and to possible new discoveries and reflections related to gifts that you have made or facilitated and gifts that you may be part of in the future. There is also a risk of loss of confidentiality (see below).

While one is not expected to benefit personally from this study, we do anticipate that this project may ultimately help fundraisers create more positive experiences for donors because the gift-making process will be better understood.

Confidentiality and anonymity

If you are willing to participate, please complete the online consent form (sent via link in an email), and reach out to the researcher if there are any parts of the project you would prefer not to take part in. Findings from this research project may be published in reports, conference papers, journals and books. Findings may also be shared with individuals in the fundraising industry or other researchers.

Your identity and identifiable information (i.e., names of donors, institutions or cities where you work) will be held in confidence and will be anonymized in reports in which the study University of Plymouth IRB (FREIC1718.22) may be published. Audio-recordings and transcripts will be password-protected and available only to those conducting the study. Recording will be destroyed following the completion of the study. All efforts will be made to keep your personal information confidential, however absolute confidentiality cannot be guaranteed.

Payment

You will not receive payment for taking part in this study.

Voluntary nature of the Study

You have the right to stop taking part in the research at any time, including during the data collection or afterwards up to the point at which the data is analyzed. You also have a right not to answer specific questions or to ask for audio and videorecording to stop.

Contacts for questions or problems

For questions about the study or to receive a summary of its findings, contact the Researcher, RESEARCHER NAME (RESEARCHER EMAIL or RESEARCHER PHONE NUMBER), Doctoral Candidate, University of Plymouth (UK). For questions about your rights as a research participant or to discuss problems, complaints or concerns about a research study, please contact Dr. Jane Hudson at jane.hudson@plymouth.ac.uk.

Thank you for taking the time to read this information sheet.

Please keep the other copy of this form and the information sheet for your own records.

Phase 2 online consent questionnaire

Question	Response options
1. By checking this box, I indicate that I have read the study information sheet related to the following research project: Self-Disclosure in Major Gift Fundraising Relationships.	• Yes, I consent. • No, I do not consent.

By checking this box I also indicate that I am willing to take part and give my permission for: • The audio/video recording of conversation • Written records of the research and its findings being held by University of Plymouth (UK) for a period of 10 years (in which all participants will be anonymous, unidentifiable and unnamed) • The use of this written research data for reports, presentations and publications	
2. Your responses to this questionnaire will be used in planning and in explaining the nature of the participating group. Your name and identifying information will remain private in all study products. How many years have you worked in fundraising?	Dropdown options: • 1 • 2 • 3 • 4 • 5 • 6 • 7 • 8 • 9 • 10+
3. How long have you worked in your current capacity/with the same population of donors?	• 1-3 years • 4 – 9 years • 10+ years
4. For approximately how many major donors (individuals/couples) are you the primary relationship manager?	• 1 – 25 donors • 26 – 50 donors • 51-75 donors • 76-100 donors • More than 100 donors
5. What is your age?	• 18 to 24 • 25 to 34 • 35 to 44 • 45 to 54 • 55 to 64 • 65 to 74 • 75 or older
6. What is your race or ethnicity?	• Asian • Black or African American • Hispanic or Latino • Middle Eastern or North African • Multiracial or Multiethnic • Native American or Alaskan Native

	• Native Hawaiian or other Pacific Islander • White • Another race or ethnicity, please describe below: (text box included)
7. What is your gender?	• Female • Male • Other/Nonbinary • Prefer not to answer
8. What is the highest level of education you have completed?	• Did not graduate high school • Graduated from high school • 1 year of college • 2 years of college • 3 years of college • Graduated from college • Some graduate school • Completed graduate school

Appendix 3. Nonsignificant results from Phase 1 hypotheses 4 - 8

Hypothesis 4:

To test hypothesis 4, a moderated mediation analysis (PROCESS model 59) was run. No evidence of moderated mediation occurred. Analyses of the effect of fundraiser's gender on giving intention ($b = 1.95$, $t(277) = .95$, $p = .34$), feelings of communal strength toward the fundraiser ($b = .29$, $t(277) = 1.32$, $p = .19$), feelings of communal strength toward the organization ($b = -.08$, $t(277) = -.34$ $p = .73$), and moral identity ($b = -.02$, $t(277) = .09$, $p = .93$) on giving intention were not significant.

Two-way interactions between fundraiser gender and moral identity ($b = -.10$, $t(277) = -.94$, $p = .35$), communal strength toward the fundraiser and moral identity ($b = -.01$, $t(277) = -1.16$, $p = .25$),communal strength toward the organization and moral identity ($b = .02$, $t(277) = 1.29$, $p = .20$), on giving intention also were not significant.

No significant results were found for the conditional direct or indirect effects of fundraiser gender on giving intention at any levels of moral identity. Results are displayed in Tables 3.1, 3.2 and 3.3

Table 3.1: Results for the conditional direct effect of fundraiser gender on giving intention at different levels of moral identity

Moderator Group	*b*	*t*	*p*	LLCI, ULCI
Low moral identity	.4005	.7593	.4483	-.6378, 1.4388
Average moral identity	-.0636	-.16.08	.8723	-.8415, .7143
High moral identity	-.2182	-.4619	.6445	-1.1483, .7118

Table 3.2: Results for the conditional indirect effect of fundraiser gender on giving intention through feelings of communal strength toward the organization at different levels of moral identity

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	-.1442	.1266	-.4528, .0490
Average moral identity	-.0074	.0335	-.0857, .0609
High moral identity	.0009	.0422	-.0948, .0891

Table 3.3: Results for the conditional indirect effect of fundraiser gender on giving intention through feelings of communal strength toward the fundraiser at different levels of moral identity

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	-.1954	.1480	-.4676, .1133
Average moral identity	-.0634	.1328	-.3171, .2130
High moral identity	.0107	.1828	-.0948, .0891

Hypothesis 5:

To test hypothesis 4, a moderated mediation analysis using PROCESS model 59 was run. The nonsignificant results from the analysis are reported here. Analyses of the effect of disclosure type on giving intention (b = -1.28, $t(277)$ = -.54, p = .59), feelings of connection toward the fundraiser (b = -.49, $t(277)$ = 1.55 p = .12), feelings of connection toward the organization (b = -.40, $t(277)$ = -1.26, p = .21), and moral identity (b = -.24, $t(277)$ = -.94, p = .35) on giving intention were not significant.

Two-way interactions between disclosure type and moral identity (b = .06, $t(277)$ = .49, p = .62), connection toward the fundraiser and moral identity (b = -.01, $t(277)$ = -.87, p = .38) and connection to the organization and moral identity (b = .03, $t(277)$ = 1.62, p = .11) were not significant.

No significant conditional direct effect of disclosure type on giving was found, as demonstrated in Table 3.4.

Table 3.4: Results showing the conditional direct effect of disclosure type on giving intention at different levels of the moderator:

Moderator Group	b	t	p	LLCI, ULCI
Low moral identity	-.3525	-.5955	.5520	-1.5177, .8128
Average moral identity	-.0745	-.1820	.8557	-.8802, .7312
High moral identity	.0182	.0366	.9709	-.9613, .9977

Conditional indirect effects of disclosure type on giving intention through feelings of connection

to the organization were not significant.

Table 3.5: Conditional indirect effects of disclosure type on giving intention through feelings of connection to the organization at various levels of moral identity.

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	-.0013	.0621	-.1813, .0872
Average moral identity	.0188	.0612	-.1034, .1515
High moral identity	.0358	.0933	-.1636, .2291

Hypothesis 6:

To test hypothesis 6, a moderated mediation analysis (PROCESS model 59) was run. No

evidence of moderated mediation occurred. Analyses of the effect of fundraiser gender on giving

intention ($b = .68$, $t(277) = .34$ $p = .73$), feelings of connection toward the fundraiser ($b = -.41$,

$t(277) = 1.49$ $p = .13$), feelings of connection toward the organization ($b = -.32$, $t(277) = -1.07$, p

$= .29$), and moral identity ($b = -.18$, $t(277) = -.66$, $p = .51$) on giving intention were not

significant.

Two-way interactions between fundraiser gender and moral identity ($b = -.04$, $t(277) = .36$, $p =$

.72), connection toward the fundraiser and moral identity ($b = -.01$, $t(277) = -.71$, $p = .48$),

connection toward the organization and moral identity ($b = -.02$, $t(277) = 1.45$, $p = .15$), on

giving intention also were not significant.

The conditional direct and indirect effects of fundraiser gender on giving were not significant, as

displayed in Tables 3.6, 3.7 and 3.8.

Table 3.6: Results showing the conditional direct effect of fundraiser gender on giving intention at different levels of moral identity:

Moderator Group	b	t	p	LLCI, ULCI
Low moral identity	.1066	.2060	.8370	-.9122, 1.1253
Average moral identity	-.0644	-.1603	.8727	-.8553, .7265
High moral identity	-.1214	-.2547	.7992	-1.0599, .8171

Table 3.7: Results showing conditional indirect effects of fundraiser gender on giving intention through feelings of connection to the fundraiser at various levels of moral identity.

Moderator Group	b	BootSE	LLCI, ULCI
Low moral identity	-.1044	.1767	-.4579, .2679
Average moral identity	-.0798	.0996	-.3046, .0971
High moral identity	-.0721	.1126	-.3342, .1187

Table 3.8: Results showing conditional indirect effects of fundraiser gender on giving intention through feelings of connection to the organization at various levels of moral identity.

Moderator Group	b	BootSE	LLCI, ULCI
Low moral identity	-.0334	.0955	-.1886, .2121
Average moral identity	-.0264	.0625	-.1721, .0897
High moral identity	.0080	.0910	-.1805, .2027

Hypothesis 7:

To test hypothesis 7, a moderated mediation analysis (PROCESS model 59) was run. No evidence of moderated mediation occurred. Analyses of the effect of disclosure type ($b = .64$, $t(277) = .30$, $p = .76$), feelings of commitment toward the fundraiser ($b = .10$, $t(277) = .41$ $p = .68$), feelings of commitment toward the organization ($b = -.15$, $t(277) = -.52$, $p = .61$), and moral identity ($b = -.26$, $t(277) = -1.03$, $p = .30$) on giving intention were not significant.

Two-way interactions between disclosure type and moral identity ($b = -.04$, $t(277) = -.37$, $p = .71$), commitment to the fundraiser and moral identity ($b = .01$, $t(277) = .47$, $p = .64$, commitment to the organization and moral identity ($b = .02$, $t(277) = .98$, $p = .33$, on giving intention also were not significant.

The conditional direct and indirect effects of disclosure type on giving were not significant, as displayed in Tables 3.9, 3.10 and 3.11.

Table 3.9: Results showing the conditional direct effect of disclosure type on giving intention at different levels of moral identity:

Moderator Group	*b*	*t*	*p*	LLCI, ULCI
Low moral identity	.0062	.0115	.9908	-1.0609, 1.0734
Average moral identity	-.1829	-.4472	.6550	-.98880, .6222
High moral identity	-.2460	-.5012	.6166	-1.2121, .7201

Table 3.10: Results showing conditional indirect effects of disclosure type on giving intention through feelings of commitment to the fundraiser at various levels of moral identity.

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	.2090	.1535	-.0557, .5475
Average moral identity	.1440	.1130	-.0630, .3810
High moral identity	.1171	.1365	-.1318, .4118

Table 3.11: Results showing conditional indirect effects of disclosure type on giving intention through feelings of commitment to the organization at various levels of moral identity.

Moderator Group	*b*	BootSE	LLCI, ULCI
Low moral identity	-.0049	.0744	-.2020, .1217
Average moral identity	.0200	.0639	-.1116, .1571
High moral identity	.0340	.0898	-.1517, .2176

Hypothesis 8:

To test this hypothesis a moderated mediation analysis (PROCESS model 59) was run. No evidence of moderated mediation occurred. Analyses of the effect of fundraiser gender on giving intention ($b = .03$, $t(277) = .02$ $p = .99$), feelings of commitment to the fundraiser ($b = .13$, $t(277) = .58$ $p = .56$), feelings of commitment to the organization ($b = -.17$, $t(277) = -.59$, $p = .55$), and moral identity ($b = -.28$, $t(277) = -1.09$, $p = .28$) on giving intention were not significant. Two-way interactions between fundraiser gender and moral identity ($b = -.01$, $t(277) = -.14$, $p = .89$), commitment to the fundraiser and moral identity ($b = .00$, $t(277) = .35$, $p = .72$), commitment to the organization and moral identity ($b = .02$, $t(277) = 1.04$, $p = .30$), on giving intention also were not significant.

The conditional direct and indirect effects of fundraiser gender on giving were not significant, as displayed in Tables 3.12, 3.13 and 3.14.

Table 3.12: Results showing the conditional direct effect of fundraiser gender on giving intention at different levels of moral identity

Moderator Group	b	t	p	LLCI, ULCI
Low moral identity	-.1855	-.3553	.7229	-1.2131, .8421
Average moral identity	-.2513	-.6282	.5304	-1.0388, .5362
High moral identity	-.2733	-.5785	.5634	-1.2031, .6566

Table 3.13: Results showing conditional indirect effects of fundraiser gender on giving intention through feelings of commitment to the fundraiser at various levels of moral identity

Moderator Group	b	BootSE	LLCI, ULCI
Low moral identity	.2104	.1569	-.0603, .5578
Average moral identity	.1333	.1154	-.0727, .3866
High moral identity	.1037	.1390	-.1644, .4006

Table 3.14: Results showing conditional indirect effects of fundraiser gender on giving intention through feelings of commitment to the organization at various levels of moral identity

Moderator Group	b	BootSE	LLCI, ULCI
Low moral identity	-.0679	.0876	-.2346, .1382
Average moral identity	-.0279	.0634	-.1621, .1037
High moral identity	.0079	.0894	-.1644, .2144

Appendix 4. List of initial ideas generated during the first phase of the thematic analysis process, as described in section 4.2.3

- Self-disclosure is a tactic fundraisers use to get donors to open up
- Sharing is VERY COMMON – most fundraisers interviewed share personal stories at every donor visit
- Sharing is about what the donor needs or wants to hear
- Sharing builds trust with donors
- Some fundraisers generally keep things superficial, find donors do not want to know them personally
- Waiting until the donor shares first
- Sharing makes cultivation go further faster – helps with the cultivation process
- Fundraiser looks for connections to his/her own life
- Sharing brings the fundraiser/donor relationship closer
- It's not about me! (the fundraiser)
- For some donors, giving money is emotional so they want/need the fundraiser to "get emotional" with them
- Being able to share with a donor = job satisfaction
- Female fundraiser more comfortable talking to female donors
- Becoming too close makes it hard to solicit
- Environment affects disclosure decision – institutional culture and/or unit area (i.e, education vs engineering/business)
- Fundraisers have to be vulnerable with donors
- Meeting an expectation to share
- Sharing progresses the relationship
- Plans what personal stories might be shared
- Sharing is spontaneous
- Wary of boundaries between "friends" and professional friends
- Got too close to donors
- Being seen as "human" is important
- Sharing is meeting the donor's human need to create a human connection
- Sharing because it's what the donor wants
- Editing self-disclosure based on assumptions made about the donor
- Sharing helps reveal donor passions
- Sharing helps inspire donor giving
- Sharing creates balance in the relationship so that the donor is not the only one revealing
- Sharing helps when conflict arises in the future
- Not every interaction is about money – sharing helps accomplish this
- Tells the story of students and the institution rather than own story
- Importance of reciprocation
- Sharing is giving the donor what they want
- Sharing is storytelling
- Shared experiences help build trust

- Self-disclosure says to the donor: WE ARE THE SAME
- Fundraisers who are reluctant to share use stories from others at the university to create a feeling of reciprocation
- Sharing is not manipulative
- It's good to be vulnerable
- Female fundraisers have to be more careful with their self-disclosures
- Fundraiser models norms for the relationship (related to sharing) – communicates his/her expectations
- Institution must remain the focus
- Direct connection between fundraiser's vulnerability and donor's generosity
- Fundraiser sharing communicates permission for donor to share
- Pull back on sharing if sense it's not what the donor wants
- Fundraiser sharing eases concerns about manipulation
- Having "a feeling" the donor is "ready" for the fundraiser to share
- Importance of authenticity
- Self-disclosure builds credibility
- Role-playing, practicing self-disclosure, coaching others on how to disclose personal stories
- Self-disclosure helps differentiate the fundraiser and his/her organization
- Self-disclosure helps the fundraiser pull on the donor's heart strings
- Self-disclosure helps the fundraiser make assumptions about the donor that they use in future interactions
- Sharing because fundraisers genuinely care for donors and it would be weird not to share with a person you care for
- Rewards of sharing are personal care and feeling like you are part of "something bigger"
- Giving is personal so the fundraiser has to get personal
- Self-disclosure is more important with donors who are interested in heart strings versus data and numbers

Appendix 5. Disclosure examples from all 20 Phase 2 participants

Number	Participant ID	Excerpt	Example of
1	F03	But you know certainly I think, you know, I I share my values, and I you know I share my, you know, my opinions in in some regard. Because I, because I think it shows that you're a person, and that you have a heart, and that you believe in something, you know, beyond just, you know, kind of the classic box of fundraising, right? Like, you also have hopes and dreams and thoughts and ideas and, you know, this meeting isn't for me to talk about all of that, right? You know, with with you. But certainly to to just try to… "Oh, well, my husband and I, you know…" "This is some things that are important to us…", or you know, "I grew up in this, you know, with this access to education," or, you know, like… So, you try to…	Self-related
		And I'm trying to remember how it came up, but I remember telling him. I said, you know, I understand what you're saying. I said, "I'm married to a black man", and I don't often tell people that. Especially donors because they don't, they don't know how to react. And it, you know, it makes people uncomfortable. And I said I was telling him how hard it was the first time I brought him home. This teeny tiny, small town, and how nobody else in town looks like him, and acts like him and…	High depth
2	M04	It's just, every time I meet with a donor, I'm not afraid to kind of dive, dive into what's going on currently in your life, because I think sometimes what's going what's going on in our current life and our current situation… I think that we're actually… You'll be… it's amazing how it ties up with what's going on with their life, just because people's experience… I don't know if it's a timing thing or a chance thing, or if it's something it's like the universes have aligned to have you guys speak… But it's amazing all of a sudden, you like 'Oh, my Gosh! We're going through this… or we're…', you know, it's just It's just so interesting	Self-related
		So, I really dove into… cause he, one of his gifts is to education. So, I told him about how I really, really struggled in high school with dyslexia, and I dove into what it meant for me to have a 1.2 GPA and the told story about it how a teacher had me stand up and read in front of the class, and how she asked me what grade I was in and belittled me, and so I told… So, I told him about that part of the story.	High depth
3	F05	I always keep it superficial, but I talk, I think sometimes, because up here it feels a little exotic, although it's strange to me that it would you know my X heritage and growing up in STATE, and growing up in a bilingual environment. So I sometimes will talk about that just because it's memorable and easy and authentic. But if it's you know if it's about my family, I select. So I might speak to someone who has an engineering link you know I might talk	Self-related

		about my husband because he works in engineering. I might talk about my kids who were Boy Scouts because a lot of our donors are voice scout leaders, or were Scout leaders, Eagle scouts, and so on, are involved in Boy Scouts of America. So it depends. It depends. I have one donor who loves nature, and we talk about nature and we talk about gardening and birds, and so I'll mention things about mine, my animals and my gardening, and you know it just depends. I pick what resonates most with the donor.	
		She was like a second mother to me, I know we talked about her before. I ended up living with her, I went through a divorce, and she'd lost a daughter to a serial killer and we met in the court advocacy system. So there was emotion again and loss of a child at the center point of that relationship. And so when I knew our worldview and politics were aligned, and we worked together side by side. She was my volunteer when I was a court advocate before she was my donor.	High depth
4	F07	So as we would sit down to have a conversation about the leadership of the organization, we were also, she was telling me about the trials and tribulations of raising her kids, and I was coming back with Oh, yeah, I've got my own issues raising 3 step kids you know so I think it would… it's probably a give and take kind of a conversation.	Self-related
		But it was the week after their reunion celebration. I had a miscarriage, and of course I was out of the office for a couple of weeks, and we were trying to tie up staff and everything, and (DONOR) actually called me at home. Because my boss had shared what had happened with me, and this was before, really, I was all about my cell phone and all that. So, but I got a call at home, and he said you don't need to say anything. All you need to know is that we love you and we're cheering for you, and we all have stories of our own. So, when you're ready to talk, we're ready to talk. And would you know that fall at homecoming a bunch of them were there, and we talked. We talked about loss. We talked about situations that that they had all dealt with as well. And I don't know I think it brought me closer to them as a group of people, but also them as… they knew something about me that was important to me.	High depth
5	F08	So if we're having a discussion and… So let I get a lot, because of the college that we work at, a lot of folks are first generation college students, and I have that link with people. So when they start talking about how hard it was for them to get to college because they didn't have an example to follow, I'm like … that's exactly what happened to me, and we start comparing notes about our college experience and that dovetails into what a difference they could make, in the life of someone else, by being able to serve as an example, and showing what you can do with the opportunity that was given to. So that's just one example… But, you really have to you have to be able to share of yourself, and be somewhat	Self-related

375

		vulnerable. And if you can't do that, you will never be good at this job. (laughs)	
		And then I shared, you know I grew up in a very poor home. So, if not for our church and kind people, there were times that we would never have eaten.	High depth
		Entering into higher education was terrifying for me. Because I had no one who could tell me what to do, what the right thing was to do, how I was going to finance it, how I was going to fund it. And so I relied on the people at the university that were there to work with me. My financial aid officer. My counselor. My academic advisor. You know I had to rely on people outside of my family to get me through college, and that's why coming here and taking the job is very important to me, because I am living proof that education changes a life. I would not be where I am today, with… see, I'm getting choked up again!... without my bachelor's degree.	Mission-related
6	M09	They talked about Covid and their grandkids, and you know in some ways, again, I kind of engaged the conversation. I talked about my family having 3 kids under 3 in how scary that was, and it could be relatable to their kids, you know… grandkids But then that kind of directed the conversation so it's not necessarily about the Major gift or what we're planning to do. But it makes it more personable and I don't know what the word I'm looking for is…. But it humanizes the process. Maybe that's a good way to put it? But, so I do a lot of stuff like that.	Self-related
		He came from a well-established family in the area, and he was talking, you know, about his wife and them trying to get pregnant and you know, trying… about in vitro and some of the issues that they are having. And we had similar issues and again, I didn't know him that well, I mean I knew I mean you know this first time we actually met, I mean met and sat down. So, we got… I say, wow! We went through the same thing. He was like, you did? And I was like yeah, and he's... I feel like it happens so much more and people won't talk about it. I'm like Yeah, it does.	High depth
7	M10	Well building those common things with donors. I tell them stories about myself all the time. It may be my family, one of my sons, and how I might evoke, you know. It might be a football thing where they are into football, and their kids played football, and so I would tell them a story about my son and experience.	Self-related
		Yeah, so I talk about my college experience when I'm here with a donor. A particular example of that would be when I talk about engagement and how the university has grown since I was here as a student. So, I was here in the nineties. And so I talked about the difference between the university then and the university now.	Mission-related
8	F11	So we got in this very lengthy conversation about pies, and what kind of pies, and where to eat them. And I just happen to also enjoy pie, so that you know… and I mean food. Yeah, right?	Self-related

		Food becomes common conversation, but I think travel, books, you know. I think when you get into the whole person you start to find that there's you know, there's places to connect.	
		My oldest son, was having problems getting him to kind of connect with us, and so I was talking through (with a donor), you know, just some challenges that we had had with him, which were very much in the line with some challenges he was having with his younger son at the time who had moved to another part of the country, and kind of didn't have a career focus or a path. And so we just, you know, had some commonality in that conversation. And so it was it, you know, kind of advice, sharing, you know what are some strategies you've used as a parent of a boy who kind of doesn't know what they want to do next?	High depth
9	M12	So when it comes to talking about the arts, I can talk about Yeah, my mom tried to get me to play, you know. Take piano lessons when I was in fifth and sixth grade, and it only lasted for a year and a half and boy do I regret not sticking with taking piano lessons.	Self-related
		You know, I am the oldest of four kids, and all four of us ended up graduating from UNIVERSITY. Our family had no connection with the university at all before we started, and my father was a high school principal. So, you know, yeah, there are situations, there might be cases where I will talk personally about people who influenced me during my four years here.	Mission-related
10	M13	But I would definitely say that the more… for example, when I would when I worked in STATE, and I had an opportunity to visit with donors from OTHER STATE, that we shared that, that we were from OTHER STATE, that that it was just easier to jump right in or there's somebody that loved college athletics, or was a college athlete like myself, that that you just kind of jump in, and instead of starting at, you know, if it's one to 100, for a 100 that being an outstanding relationship and one is just get started, I think you kinda start at 5 or 10 for some people based on shared experiences	Self-related
		For me, frankly, it was I'd been divorced twice by age 35. So, I always had professional life down, and shared shared that only with a few donors. And frankly, I felt more comfortable sharing it with donors than, and sometimes my work colleagues, because, you know I wasn't a peer. I was the boss or perceived as the boss, right? And so, for me that's one of the stories always opened up and told them. And now, if I felt like I was comfortable enough with them and not feeling judged because I probably would have judged like, Oh, my God, what's wrong with this kid? He's 35? There's clearly, he's got to have something crazy about him, and so I was always kind of embarrassed and and shy to mention that. But after a while you just get comfortable with someone, and you just tell them kinda who you are, and what you're about and life events that have shaped you.	High depth

11	M14	I mean I'll tell stories about my dad. My dad was a preacher. I'll talk about how hanging out with my dad when I was younger… I have 2 older sisters and our family, we all sing. My parents and sisters enjoy it more than I do, but I can sing. So when I was a kid, my dad… See, you're hearing all these stories! My Dad would always once a month, have to do nursing home duty. And so on a Sunday after church we'd go home have lunch, and then all the kids and mom we'd all go to the nursing home, and he would do a little, We'd have a little service thing we'd sing hymns. We typically as a family would sing a song.	Self-related
		I talk about how my educational experience changed my life. I'm a preacher's kid… you're going to get to hear the story! My parents couldn't afford to send me to a small private liberal arts college. So, I needed scholarship aid, and I got scholarship aid, and I had the opportunity to go to UNIVERSITY, and my life was changed significantly. It was an important part of who I am today, and how I got to where I am today. The faculty, the staff that helped get me there, get me through UNIVERSITY, provided help find aid and all the things that I needed, so that I could get that kind of education that I think was most important for me and so my life was changed in those four years. No doubt about it. I had a great experience and I wouldn't trade that for the world.	Mission-related
12	M15	I just simply say something like, you know I have a have a daughter who herself has a couple of kids and you know they live in they live in CITY, STATE, and you know we right now, my wife and I are living with them. We haven't found a place to live here yet.	Self-related
		Alright. So let's say somebody fly fishes not because they like to catch fish, but because standing, you know, up to your chest in water in a stream, and a beautiful place is one is the only place on the planet you can clear your head, because you're running a fortune 500 company, and that gets you away. That's what that's what sailing does for me. It gets me out, and that's the one place I can go where the time passes very quickly. I can get my head cleared out. So I'm generally gonna be looking for those kinds of ties as opposed to just the fly fishing itself. Oh, I made pun there! I worked 'tie' in. That was that was terrible and unintentional. Sorry.	High depth
13	M16	But you know people in conversation share stores about their kids, you know. Now that I'm a dad, that's another common ground that I can share my stories with to just you know, relate to them, especially in in the early on stages of getting to know somebody.	Self-related
		So again, and I'll connect through him to a lot of those people by telling them stories about COACH and my experiences here at UNIVERSITY that makes not have included him. A regular occurrence.	Mission-related
14	M17	I would say, like 90% of the time I'm totally fine saying like you know like and in past relationships like, Oh, yeah, my boyfriend, and I took a vacation to CITY for New Years or you know, I talk	Self-related

		about my family. A lot of folks asked me like, where did your charitable inclination come from? I talk about my grandma who's no longer with us, I talk about my mom. Of course I've already mentioned I talk about my sisters, and my father's sister, who passed, so I mean sometimes it's like a high level of detail.	
		I tell my own story. I talk about my own charitable giving and it's very easy for me, because, like I'm only 33 but I already have a plan gift set aside for UNIVERSITY. I am currently paying off a major gift scholarship pledge myself. And so I typically like to go at it from like if they're not so open to just starting with their story, I start with mine, kind of to let them know like it's okay, like I'm in the same space as you and you know, even though we might be different ages or from different parts of the country or went to different schools, we still have similar experiences in that you know our education paved for the way for us, and you know we want to give back. So just kind of like creating that common bond.	Mission-related
15	F18	If you know they have asked if I am an alum, and I usually answer that question by no. So you know, Did you graduate from UNIVERSITY? No, I'm associated with UNIVERSITY by choice. And you know I had an opportunity to come and work here, and I jumped on it. And then my personal story, which I think I mentioned a little bit. I'm a first-generation college student. I, you know, had that whole imposter syndrome for many years when I worked I worked in higher ed publishing and I worked for big companies, and I was calling on authors of you know, our the econ books and the accounting books and the chemistry books that we all you know everybody uses and these PhDs think everybody it comes from you know family that colleges the only way to go. And it's bizarre when people realize that well, you know. No, my dad begged me not to go to college. I tell that story a lot, because it's a similar situation to what a lot of our students experience.	Self-related
		I often use them my personal story of my dad, who didn't did not want me to go away to college because he didn't want me out of the house. He wanted me to stay there. So it was it was sort of a battle, and I can relate that story to the experiences that a lot of our students have because it's one of our hardest problem in admissions is we have these very bright, low income students and they're either gonna get full rides to the flagship institutions in our state, and they fill that diversity hole for the Ivys and whatnot or they go to the community college because they don't only home. So, the idea of a school like this is foreign to them and it was very foreign to me, that idea of a small liberal arts college.	Mission-related
16	F20	I said I would love to come visit (the donor). And so and in that conversation though unfortunately they had had Covid. And so then I share you know a little bit about it my Covid journey, or they were talking about the venue, and how fall is, you know, and my niece is getting married, this fall. So then they get a little bit of information. So now they know that I've had Covid they know that I have a niece like, so that's kind of how… you don't share tons,	Self-related

		but you open it up. It's that shared connection in if they're willing to share with you, then you share with them.	
		I think it's the story of how education changes lives, and I and so I can share that, how it's impacted my life and that that doesn't change. That story is, I was raised by a single mom, first generation. The education was never, and if it was where you know because she understood what education had done for her sister, who did have a college degree.	Mission-related
17	M22	I'm a product of what I am fundraising for. So I'm a graduate of Berea so I know firsthand the life changing the mission of UNIVERSITY. And so it's personal to me and so I often will, you know, talk about either myself you know friends of mine family members that have had a couple of family members go here to talk about stories of where whatever we're talking about the instance that that I can relate to.	Self-related
		So, when I talk about how intimidating it can be to get to the college campus coming from a small mountain town. Then I can really speak to that because I lived that. And so, I do bring that personal experience in because it is relevant exactly to what I'm trying to get across to them of why their support is so important.	Mission-related
18	F24	I share personal stories with donors every time I meet with them. So whether it's like what my husband and I did over the weekend with our dog, or what our family is doing for holidays, I mean that that exchange is just sent natural	Self-related
		So definitely what my experience was like being a military kid, growing up in the area where I grew up in and just like my exposure to the community. So we have a big, there's a big Navy base in my community, and so people always want to know like, were you around when this was there. Or this was there. And so we talked a lot about that, and just the community that I grew up in.	Mission-related
19	F25	(Sharing an example of stories she shares with donors.) I can tell you (the donors), here's what it feels like when you're one of several, and you get overlooked because you're in a packed classroom and there's only one teacher and they're dealing with a lot of different kinds of issues and every student has a situation that they need to pay attention to, the best rise to the top. You're a star student. That's fine, but if you're a star student who has some learning disabilities, and you're in a public institution that does not have the resources, you get left behind. Doesn't mean you can't be successful. You just can't be successful in that space.	Self-related
		(Sharing an example of the type of personal story the participant shares with donors.) So going through to college, not having the, you know, what I thought were coping mechanisms to, you know, ask for help, study techniques, writing assistance, those you know things that every college has but if you are first generation you don't know where to go, what to ask for, or if you can, because that means some places that's seen as weakness… it means that your first year is going to be a bit of a struggle. Now, I made it through.	Mission-related

		I think I made it through, passing through very, very, very, very precariously.	
20	F27	But once we have a relationship, I do bring up things or share things about my life and sometimes I'll share things about, especially my daughter, who is an alum of UNIVESITY you know and she was a you know she graduated in nursing. So I'll share about her so I try to share about my points of connection with (UNIVERSITY) Yeah, my husband's a he was a teacher. He was an alum from the college of education. So I'll share from that perspective. Yeah. And when I was going through a lot with my mom, I probably shared that a little bit more easily.	Self-related
		And so then my mom passed away, not very long after that, and I made sure to tell them. It's just felt important because they had been checking in about my mom for so long. And so I made sure to tell them.	High depth