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Empirical Questionnaire Methods for Fund-Raising Campaign Preparedness in Extension

Catherine Comley Adams
University of Missouri

Douglass A. Butler
University of Missouri

Kaleb Esplin
Utah State University

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Empirical Questionnaire Methods for Fund-Raising Campaign Preparedness in Extension

Abstract

Amid waning public financial support for Extension program offerings, highly strategic and professional fund-raising practices are necessary for gaining momentum among private philanthropists and closing the fiscal gap. University of Missouri Extension conducted a precampaign survey that invited feedback from stakeholders to inform Extension leadership on how to execute fund-raising initiatives tailored to the audience. As a result, University of Missouri Extension is better positioned to serve the needs of its constituents by recruiting significant private financial support according to donors' unique interests.

Catherine Comley Adams
Director of
Advancement
comleyc@missouri.edu

Douglass A. Butler
Advancement
Associate
butlerdo@missouri.edu
[u](#)

University of Missouri
Extension
Columbia, Missouri

Background

The decline in state appropriations for higher education has required heightened urgency among Extension leaders in developing strategies for diversifying funding streams and protecting program offerings (Romich & Campbell, 2015; Stiehl, Bessey, & Schmall, 1992; Taylor & Anderson, 2008). Tapping diverse funding opportunities requires deliberate, thorough cultivation and the use of thoughtful fund-raising practices, such as proposal writing, community investment, and targeted marketing (Carroll, Gross, & Leist, 2003). Likewise, funding success is positively correlated with both a commitment to stakeholder involvement and consistent branding of community benefits (Carroll et al., 2003; Hughes & Ledbetter, 2009). To effectively incent prospective supporters, it is critical to understand who they are and what motivates them (Taylor & Anderson, 2008).

Although individual donors contribute 87% of Extension charitable dollars, Extension professionals tend to focus on effort-intensive endeavors such as grant writing, membership drives, and product sales (Carroll et al., 2003; Taylor & Anderson, 2008). Individual donors are more likely to accept proposals when Extension clearly defines community needs in terms that resonate with their funding audience (Angima, Etuk, & King, 2014). Conducting a strategic survey of stakeholders accomplishes a number of tasks. Most important, any pertinent information gained can be used to remove barriers to quantifying Extension's value to individuals and the community as a whole (Haskell & Morse, 2015; Hughes & Ledbetter, 2009). Moreover, asking stakeholders strategic questions elicits their buy-in, provides rationale for requesting funds from key prospects by discerning the interests they have in common, and builds the platform on which to attract other individuals in the community with whom Extension's mission aligns (Hughes & Ledbetter, 2009; Taylor & Anderson, 2008).

Context

The University of Missouri (MU) launched its \$1.3 billion comprehensive campaign in October 2015. This was the first university-wide campaign to include Extension; therefore, Extension did not have a foundation on which to build a fund-raising strategy. In an effort to expedite the strategic planning process, a survey was prepared for gathering feedback from existing stakeholders and designing a campaign tailored to their specialized interests.

Preparation

In coordination with experts from the office of institutional research, a team of Extension staff and fund-raising professionals drafted a 39-question survey. The survey may be viewed at extension.missouri.edu/2015survey. We tested the survey instrument with all program leadership directors and volunteer campaign committee members. The final version was distributed in either print or electronic form to approximately 7,500 participants.

Results

For the 7,500 distributed surveys, there was a 12% response rate (931 partially answered) and 10% completion rate (756 at least one third complete). The median age reported was 65 years, and women made up 66% of respondents. The lack of diversity in age and gender presents the largest limitation to the study.

Table 1 lists five integrated programmatic areas recommended by campaign feasibility study findings as important topics around which to build campaign messaging. However, only two of the programmatic areas—education and community development—were identified by the overwhelming majority of respondents in our study as most important. We were surprised that our survey findings differed from the feasibility study in this way.

Table 1.

Importance of Integrated Programming Priorities to Respondents

Which of these University of Missouri Extension priorities is the most important to you?	%
Educational programs that encourage people to never stop learning	50%
Economic, business, and workforce programs that strengthen communities	25%
Food systems to help producers grow smarter and to help people eat better	14%
Human health systems that encourage people to get healthy	7%
Environmental programs that help people live green while saving green	4%

Table 2 illustrates the program areas of Extension that respondents deemed most important. It is significant that a plurality of respondents designated 4-H. One cause for concern is that national, state, and local county 4-H foundation charities are soliciting funding for 4-H programs separately from Extension in many cases. This disunited effort may saturate prospects with solicitations, possibly limiting Extension's opportunities to foster funding relationships with this particular audience.

Table 2.

University of Missouri Extension Programs Most Important to Respondents

Which University of Missouri Extension program area(s) is (are) most important to you?	%
4-H	48%
Agriculture	12%
Master gardener/gardening	10%
Health and nutrition	8%
Livestock	4%
Business development	4%
Community development	4%
Family	3%
Environment and natural resources	3%
Agronomy	3%
Horticulture	3%
Financial education	2%
Osher Lifelong Learning Institute/continuing education	2%
Human environmental sciences	1%
Other	10%

Note. Percentages reflect the proportions of respondents who selected given programs as respondents were permitted to identify multiple programs of importance.

Tables 3–5 illustrate findings from questions related to philanthropic behaviors. Apart from self-directed influences, respondents acknowledged Extension faculty, staff, and volunteers as most influential in motivating them to make financial commitments. Surprisingly, respondents are more influenced to make a contribution to Extension by someone within the organization than they are by their own spouses. This finding illustrates the great significance of relationships between Extension personnel and clientele as part of the development process. Similarly, key motivating factors for contributing were largely tied to Extension's people and projects. Only 11% were motivated by public recognition or tax purposes, which are often among the first suggestions many printed solicitation materials promote. Moreover, only 11% of respondents expressed interest in membership in the university's donor recognition society. Hence, 89% of Extension's constituency either find a different method of stewardship more appealing or are not aware of the program and are thereby unlikely to make campaign commitments in response to donor society membership as the inducement.

Table 3.

People Having Influence on Respondents' Charitable Giving Decision Making

Who is most influential in motivating you to contribute to University of

Missouri Extension?	%
Self	49%
Extension faculty, staff, or volunteer	25%
Children	8%
Council member	6%
Spouse	4%
Other	6%

Note. Percentages do not sum to 100% as figures were rounded to the nearest whole number.

Table 4.

Respondents' Motivations for Giving to University of Missouri Extension

What are the motivating factors in your decision to contribute to University of Missouri Extension? (Select all that apply.)	%
Belief in the mission	75%
Interest in a specific project	28%
Respect for Extension leadership	25%
Gratitude	20%
Tax considerations	10%
Public recognition	1%
Other	5%

Note. Percentages reflect the proportions of respondents who selected given answers as many respondents selected multiple items.

Table 5.

Importance of Donor Recognition Society Membership

Is receiving credit for membership in a university donor recognition society important to you?	%
Not important	63%
I'm not familiar with the recognition society	26%
Somewhat important	9%
Very important	2%

The data shown in Tables 6 and 7 represent great opportunities for and challenges to Extension's campaign.

Table 6 illustrates that 56% of respondents place Extension in the middle or higher among organizations to which they donate. From a professional fund-raiser's standpoint, this finding suggests a high rate of constituent giving propensity. However, as indicated by Table 7, only 6% of respondents have worked with a professional on the university advancement team to formalize a major planned commitment to Extension, and the vast majority were unaware that doing so is important.

Table 6.

Ranking of University of Missouri Extension Among Respondents' Giving Priorities

Where does University of Missouri Extension rank in your giving priorities?	%
In the middle of my priorities for giving	47%
Low priority for giving	39%
High priority for giving	9%
I have not given to University of Missouri Extension	3%
I didn't realize until now that University of Missouri Extension welcomes gifts	2%

Table 7.

Respondents' Connections with Fund-Raising Staff in Estate Gift Process

Is a fund-raising professional in Extension aware that you intend to make an estate gift?	%
I did not realize the importance of sharing my intent to make a gift	53%
The university has already acknowledged my estate gift	3%
I am in contact with a fund-raising professional	3%
I would like to be in contact with a fund-raising professional	2%
Other	39%

Conclusion

On the basis of the survey, we may surmise that the "typical donor" profile for MU Extension is as follows: female, approximately 65, affiliated with 4-H, volunteer, grateful client, farming community resident. This profile may serve as an elemental tool in the absence of something more sophisticated, but generalizability is limited by our small sample and respondent demographics. Most notably, 38 prospective donors self-identified their giving intentions, which translated into \$2 million in new funding proposals. Subsequent relationship management strategies included personalized correspondence, individualized strategic communications, and exclusive events to foster connections between constituents and professional fund-raisers.

The survey revealed that we must be innovative in our fund-raising approach as Extension constituents require different stewardship strategies than other university donors. Survey respondents expect targeted messaging about what Extension is doing and how its programs affect the people in their communities. Therefore, MU

Extension's campaign strategy is shifting toward messaging about educational, community development, and 4-H programming that has impact and warrants private philanthropic support in coordination with advocacy by respected faculty and volunteers.

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