CHARACTERISTICS OF DEVELOPMENT DIRECTORS
IN CHARITABLE HOMES FOR THE AGED

DISSERTATION

Presented to the Graduate Council of the
North Texas State University in Partial
Fulfillment of the Requirements

For the Degree of

DOCTOR OF EDUCATION

By

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May, 1988

This study concerns the characteristics of fund development directors employed in selected homes for the aged. The first purpose of this study is to develop a profile of job functions, through task analysis, among development directors in charitable homes for the aged. The second purpose of this study is to develop a profile of personal characteristics of development directors of charitable homes for the aged based on the following characteristics: age, sex, educational background, experience outside development, membership in community organizations and amount of specific training in fund development.

One instrument was used to gather data for the study. It was distributed to a population of 29 development directors in charitable homes for the aged in Arkansas, Louisiana, Oklahoma, New Mexico, and Texas. This population was predetermined by an initial survey form sent to 193 chief executive officers in the five states mentioned above. Twenty-nine reported formalized programs employing a full-time person with at least a part-time involvement in fund development activities. Of the twenty-nine development
directors surveyed, fifteen usable instruments were received (52 percent).

A program was used for the survey that included crosstabulation of social characteristics, success in fund raising, length of time in position and educational preparation. Coded responses were manually typed into the computer. To accomplish the desired analysis, percentages and frequencies were used to treat the data. These non-parametric procedures provide an understandable overview of the data obtained and are appropriate for the research questions. These procedures permit a summarization of the data in a manageable form.

Following the tabulation of frequencies and percentages, Fischer's Exact Probability Test was computed to determine if significant relationships between actual preparation and needed preparation, personal characteristics, educational preparation, and success and usefulness of experience exist.
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CHAPTER I

INTRODUCTION

The institutional care of the elderly in nursing homes and congregate living situations is an ever increasing facet of our society. Shanus and Maddox (15) say that nursing homes have become increasingly important as an in-patient facility serving the elderly in the United States. In 1985, an estimated 1.5 million elderly persons resided in nursing homes (11). In 1987, an estimated two percent (295,000) of those aged 65 to 74 years will be in a nursing home compared to about seven percent (627,000) of persons aged 75 to 84 years, and about sixteen percent (489,000) of persons 85-plus). The rate of nursing home use by the elderly has almost doubled since the introduction of Medicare and Medicaid in 1966, from 2.5 to 5 percent of the over 65 population (20).

In regard to demographic trends, the rapidly growing numbers of persons over 75 years old, about one in ten of whom are now in nursing homes, make it certain that the demand for nursing home beds will continue to grow. A recent report projected the population aged 75 and over in the year 2000 to be 17.3 million, a 46 percent increase over the 1985 population of that age group. For people 85 years of age or
older, one in five of whom is currently in a nursing home, the numbers are projected to increase from 2.85 million to 5.1 million in 2000, an 80 percent increase (18).

These institutions meet the needs of the frail and the sick who lack family support or whose families are no longer able to care for them (18). These institutions are also involved in the transmittal of education to clientele as well as staff members. One of the major tasks confronting the long-term care field is the need to upgrade and professionalize personnel at all levels (2). This educational process includes the entire life cycle and is literally one of life-long learning for the employee of the charitable home. The overall goal is to improve services to older people residing in long-term care facilities and to their families through understanding of their social needs (2).

Because of the cost, few individuals or families can afford a prolonged nursing home stay (17). Seventy-seven percent of the nursing homes in the United States are operated for profit, according to a subcommittee report on long-term care (19), which leaves a remainder of twenty-three percent that are nonprofit facilities. In most states medicaid reimbursement rates are lower than the rates charged by the same nursing homes to private-pay residents (13).

Many non-profit charitable homes for the aged in these times of low government reimbursement and government funding
cut-backs are establishing fund development functions within their administrative organizations in order to maintain or upgrade services, such as educational activities. Thompson (16) points out that there is no legal barrier to combining funds from different sources either to achieve more enriching environments beyond the limit of regulatory agency approval or to guarantee the service element in the institutional setting.

The fund development function in a charitable non-profit administrative organization is usually directed by a development officer or development director. Whether this function exists in a hospital, university, home for the aged, or other charitable administrative organization, the same basic job functions seem to be present although the purpose may differ. Mehl (10) states that the functions are the same; the difference would be in the make-up of the constituencies—but even then, there are parallels.

The Evangelical Lutheran Good Samaritan Society, the largest non-profit, charitable organization providing nursing care and housing services to the elderly, began their fund development program in 1982. In 1985, after four full years of operation, 55 of the over 200 facilities had established fund development programs in their administrative organization with the guidance of the corporate development director. In 1985 (2), over $2.5 million were raised for the local facilities through the
individual efforts of the local administrators and mostly part-time fund development personnel. Although limited consultative services are available through the corporate office, the responsibility for these fund development efforts remains at the local level.

The officers of this society are continually involved in expanding programming in fund development. They are also vitally interested in assisting in the selection of administrative personnel to coordinate the various fund development efforts at the local level. This includes offering periodic short courses for their fund development personnel, and identifying successful characteristics of development personnel. They are also concerned as to what may be appropriate background characteristics for the development directors to have both experientially and educationally.

The mission statement of the Society emphasizes development and educational innovation (5). Fund development efforts make it possible for the intent of this mission statement to be carried out.

Knowles (7), identifies a three-step process in diagnosing the needs of learners: (1) the development of a performance based model of desired behaviors or required competencies; (2) the assessment of the present level of performance by the individual in each of these behaviors or competencies; and (3) the assessment of the gaps between the
model and the present performance. Through the integration of Knowles' points, a profile of the successful development director seems possible. Knowles (7) further suggests that models of performance-based behavior on required competence can be developed in several ways:

1. through research;
2. through the judgements of experts;
3. through task analysis; and
4. through group participation.

This study will attempt to develop such a model by analyzing the tasks of selected development directors. If needs exist, a preparation program for development directors might meet the training needs of persons in these positions. It is evident then that the establishment of a data base is necessary to determine the components of a preparation program for development directors. By studying the fund development programs and development personnel of organizations such as the Good Samaritan Society, desirable characteristics of development directors can be identified and educational programming for fund development personnel can be established.

Statement of the Problem

This study concerns the characteristics of fund development directors employed in selected homes for the aged.
Purpose of the Study

The purposes of this investigation are as follows:

1. To develop a profile of job functions, through task analysis, among development directors in charitable homes for the aged; and

2. To develop a profile of personal characteristics of development directors of charitable homes for the aged based on the following characteristics: age, sex, educational background, experience in development, experience outside development, membership in community organizations and amount of specific training in development.

Research Questions

Based on the purposes of this study, the following research questions were developed:

1. What are the specific job functions that fund development directors perform in charitable homes for the aged?

2. What are the major social characteristics of fund development directors of charitable homes for the aged?

3. What are the major educational and experiential characteristics of fund development directors in charitable homes for the aged?

4. What do fund development directors in charitable homes for the aged recommend as valuable factors for their positions?
Background and Significance

Many worthwhile programs go unfunded because organizational efforts are directed by unprepared individuals who lack the knowledge and skill to seek out and secure the money to sufficiently fund them. The problem is where to secure this knowledge and these skills. Broce (1) determined in 1986 that fund raising does not have a formal body of knowledge upon which to draw. He also stated that no formal course in fund-raising methods had yet been successfully established at any American university or college. Education schools believe that training in fund raising techniques should be worked into their courses of study, while business schools believe that the field is a natural part of their programs (1). Broce (1) further states that persons educated and trained in other fields go into the work by chance or because of personal potential, rather than because of demonstrated skills. They learn the work by trial and error and attend workshops in the field, conducted by professional fund-raising organizations.

Lord (8) suggests that critical to the success of the fund-raising professional is the need for a certain make-up, certain characteristics, a certain group of personality traits. This aspect of measuring the factors for success in this field requires one to look at the professional's traits and characteristics.
Hurst says that screening applicants for a development job can be made easier with a basic understanding of an individual's characteristics. The position of development officer is a relatively new one, one which is in a state of flux and one in which the job demands vary considerably from one institution to another. Under such circumstances it is impossible to compare a simple straight-forward, scoreable test on which a high score means success and a low score means failure. Therefore, one is forced to fall back on more sophisticated interpretation and on common sense. If one knows about an individual's past, one can predict his future with more confidence than if ignorant of his life experiences. Ideas that can systematically improve screening efforts include: (1) people are more consistent than otherwise; (2) people in the same job categories are more alike than different; and (3) everything a person is, does, or says is reflective of his personality.

This study focuses on various educational, experiential, and organizational membership characteristics of development directors in charitable homes for the aged. Other studies have reported characteristics of development directors in the charitable hospital or medical setting, the charitable, non-profit association and the college or university campus while fund development studies for the charitable home for the aged are largely absent. There are many organizational similarities between the charitable home
and other charitable organizations such as charitable status, legitimacy of efforts and need for the resources that are derived from gifts and grants.

This study appears to be significant in that it provides data to

1. determine the specific job functions of development directors in charitable homes for the aged;

2. determine the characteristics i.e., the age, sex, marital status, educational background, experience in development, experience outside development, membership in community organizations and specific training of development directors in charitable homes; and

3. identify curriculum content for training persons to fulfill the development director position from a survey of education, experience and job function characteristics of persons currently employed in this position.

Basic Assumption

It is assumed that development directors in charitable homes for the aged could be profiled through task analysis of their job functions and through a determination of their characteristics.

Definition of Terms

The following terms are defined for this study.

1. Development Director—a full or part-time employee of the charitable home whose job is to provide
leadership for the fund development program.

2. A charitable home for the aged—a nonprofit, denominational, affiliated institution having a stated charitable mission for a portion of its activities and resources.

3. Fund development program—a program established and staffed for the purpose of identifying, cultivating and soliciting donations designated for either a restricted purpose or for the general welfare to aid the charitable purpose of the organization.

Organization of the Study

Chapter I has presented an introduction to the study by explaining the demographic trends for nursing homes and the aged population. The chapter also explains the necessity for fund development functions in non-profit homes for the aged.

Chapter II provides a review of the literature as it pertains to the fund raising function in general. The third chapter contains descriptions of the population, the methods used in collecting and analyzing the data, and the instrument utilized in obtaining the data.

Chapter IV presents the data findings from the research. The fifth chapter presents a summary of the investigation and its findings, conclusions drawn from the data findings, and recommendations for further research. Relevant appendices and a bibliography are also included.
CHAPTER BIBLIOGRAPHY


CHAPTER II

REVIEW OF THE LITERATURE

Introduction

Traditionally, fund development activities have been an integral part of the American pattern of voluntary non-profit agency support. The executive director and the fund development officer are the administrative persons responsible for the fund development functions in the charitable home for the aged.

Historical Perspective: The Charitable Home for the Aged

The Romans established homes for the aged, gerocemeia, in the eastern Empire. In Constantinople, Helen, mother of Constantine the Great, is said to have founded the first (3). Such institutions appeared throughout the Mediterranean, sustained by private gifts. In modern times, the dedication of the church to the salvation of souls did not exclude the humble, poor, ill, or aged. In earlier (seemingly caring) civilizations any accord given to the old tended to be reserved for those of privilege, wealth and position. The elderly of humble origins experienced horrendous lives--and deaths (3).

In our country, influenced by churches, homes for the aged were developed. "They sprang up in teeming
neighborhoods of rapidly growing cities. They dotted rural landscapes as 'old folks homes.' They appeared as boarding houses and as multi-family dwellings. These early homes for the aging were supported from the beginning by their communities. Through tithes, donations of money, clothing, furniture, buildings, and sheer human labor they were founded, struggled, survived, and prospered" (3, p. 8).

More people were staying healthy and living longer because of changing demographics in the elderly population after World War II. The charitable non-profit organizations responded by enlarging their programs and facilities for the aging. During this period nursing homes grew in number to care for those who had attained old age but who did not have a family member to care for them in their frailty.

Today, taking care of elderly parents places a heavy and expensive burden on families and there are few community resources available to help. "The costs of long-term care can be financially catastrophic for individuals and families" (4, p. 15). Fessler writes that federal, state and local governments, which pick up about three-fifths of the health care tab for the aged, are finding they can no longer continue to absorb such large, uncontrollable costs without impairing other programs (11).
Historical Perspective: Charitable Giving

The early Christian church had its common fund for care of widows and others in need. These efforts were gradually organized into special ministries to the sick, orphans, and widows, the poor, and strangers. "Clara Barton founded the first organized American charity, the Red Cross, [in] 1881" (12, p. 92). Kane also indicates that one of the first planned gifts in this country predated the birth of the nation by some 138 years. It was the bequest that helped launch the first institution of higher education. "Reverend John Harvard in 1638 bequeathed to Cambridge College 800 pounds and 300 books, a bequest worthy of renaming the college in honor of this benefactor" (12, p. 68).

Through the period of the 1930s and 1940s, fund raising became a recognized profession, and more and more charitable institutions began turning over the funding work to directors of development, taking that load off the presidents of colleges, chairmen of the boards, and founders of institutions (16). Thousands of voluntary organizations depend on private philanthropy for support of their programs and services. Because of the magnitude of private philanthropy, its power, and its corresponding impact on our society, the interaction between the private, voluntary and governmental sectors has become a matter of increasing concern (9). "It is in everyone’s self-interest to support
society through private social investments rather than through the complex and costly redistribution of tax dollars by the government" (13, p. 25). Thus the development director is given the challenge to help with this overwhelming social issue.

The Development Director and Charitable Giving

Charitable giving takes many forms such as bequests, grants from national religious philanthropic organizations, cash, stocks and bonds, insurance policies and real estate. Fund raising campaigns must be planned carefully to coordinate with other fund raising objectives of the facility. "Generally, successful fund raising based on charitable giving requires full-time professional talent to develop and sustain donations" (2, p. 18).

The Health and Welfare Ministries Board of the United Methodist Church in a recent guidebook states that every home should carry on a continuing program of cultivation of their constituents and recommends full-time staffing for larger facilities (10). They further state, "Coordination of fund raising efforts needs attention from some paid staff person, even if only on a part-time basis. It is of utmost importance to ensure prompt follow-up of all inquiries by swift correspondence, telephone and other professional contact. Major supplementing of this effort can come from volunteers, especially members of the Board of Trustees" (10, p. 3).
The best source of expertise in charitable giving is the professional fund development officer. "Knowing how much the organization can raise is a question for the professional fund raiser to answer" (1). The Development Director is the person to provide the leadership in a fund development effort to stimulate charitable giving.

The Fund Development Program

Broce (5) identifies fund raising as a sophisticated art. In the simplest terms it is the act of asking a person for a gift of money. Thousands of voluntary organizations depend on private philanthropy for support of their programs and services. He states that "while each program and each institution or organization, has its own special characteristics and style, the principals for success are basically the same" (5, p. 37).

Steps in the process that are to be taken in the total development program that will lead to successful fund raising are laid out by Broce (5). They are:

1. Determination of Institutional Goals
2. Determination of Fund Raising Goals
3. Prospect Identification and Evaluation
4. Leadership and Prospect Involvement
5. Case Preparation
6. Organization
7. The Timetable
8. The Solicitation of Gifts
He also recognizes four characteristics that are almost invariably present in a successful program.

1. The successful program is **professional**. It is skillfully planned and organized to serve the needs and objectives of the institution.

2. The successful program is **systematic**. It is so structured that the staff is capable of routinely handling the myriad of details to permit maximum utilization of personnel, time resources, and talent.

3. The successful program is **goal oriented**. It has defined, stated objectives. Thoughtful donors support institutions, programs, and projects.

4. The successful funds raising program is **productive**. It is geared to produce many times over the investment in the operation.

The Fund Development Function

Broce (5) identifies characteristics of a successful fund raiser. An effective fund raiser

1. is genuinely concerned for the well being of the institution or organization he serves;

2. accepts responsibility, establishes standards, originates action, sustains a mood, and keeps things going;

3. understands people and knows how to organize, direct, and to motivate them;
According to Schrader and Bolton (15), the ideal institutional fund development professional would incorporate the following seven characteristics:

1. A deep dedication to higher education and an understanding of its many facets;
2. A dedication to the institution, working continually at understanding it better;
3. Acceptance, as a member of the administrative team; and acceptable to the governing board, the chief executive fellow administrators, the faculty, students, and alumni;
4. is not afraid of hard work, long hours, disappointments along the way—or a few words of appreciation;
5. has the capability to coordinate special events to take advantage of such occasions;
6. communicates honestly and effectively the goals of the institution, and describes accurately the ways in which those goals will be met;
7. is versatile, able to assist the chief executive officer and volunteer workers in a wide range of duties;
8. has the skills (or is acquiring them) to provide the mechanical and professional support necessary in all phases of the development process;
9. continues to grow professionally; and
10. is a person of integrity who respects the integrity of others.
4. Knowledge of principles of good management and sound administration, clearly demonstrating this knowledge in difficult situations;

5. An expert communicator in the written and spoken word, who constantly tries to improve techniques in the use of language and the transmission of ideas;

6. Possession of the endurance of the extrovert and the patience and analytical skills of the introvert, belief in the worth of the effort, and the ability to ask for help and money; and

7. The professional enthusiasm to stay current with the relevant literature in the field, including that which deals with government affairs and tax information; new techniques for institutional relations, development and communications; the best thinking and writing by practitioners in other institutions; and the writings and speeches of educational leaders on campus and in government.

Ciervo (8) suggests that possessing good characteristics is not enough and what really counts is how well the characteristics are applied to performance and productivity. In the final analysis, practitioners are judged not by what they know, but what they accomplish. Ciervo (8) also offers a list of suggestions that are intended to help the development professional increase professionalism, performance and productivity. They are:
1. Set high ethical standards.

2. Avoid the "dumping ground" syndrome. (refers to the assignment of tasks that are non-development)

3. Set objectives and stick to them.

4. Serve as an ombudsman.

5. Use research in your work.

6. Emphasize the role of counseling.

7. Study your organization.

8. Understand your president.

9. Complete staff work.


11. Advance your education.

12. Learn all you can about public opinion.

13. Work on productivity.

14. Utilize time.

15. Organize the work.


17. Insist on deadlines.

18. Expect and Inspect.


According to Payton (14), the work of the development officer requires certain kinds of skills: (1) Verbal skills, so as to make a good case to the community at large and not just faculty members; (2) Interpersonal skills, because development is almost entirely dependent on human relations skills; (3) Organizational skills, because
development is a management function that requires the ability to work with and through others; (4) Ethical, because development work requires working with sensitive information, peoples' trust and confidence and the integrity of the institution; and, (5) Technical, because of the necessity to interpret financial data.

Chandler (7) suggests that the success of the development officer depends upon skills in management and planning, sales and marketing, communication, and educative and research roles. Also important for this professional are leadership, energy, patience, and gratitude. Since development is primarily a team concept, following set communication channels is essential. Professional improvement is encouraged and involves attendance at local, district, and national conferences to share ideas with other professional development officers, and participation in professional organizations.

Summary

Fund development activities are an integral part of the American pattern of support for charitable non-profit agencies of all kinds. Their development has been influenced by church groups. Because more people were staying healthy and living longer charitable organizations continued to expand their services and programs for the aging.
Charitable giving takes many forms such as bequests, grants from national religious philanthropic organizations, cash, stocks and bonds, insurance policies, real estate and trust instruments. The professional fund development officer is the best source of expertise in charitable giving. Each program and each institution or organization has its own special characteristics and style but the principals for success are basically the same.

Broce (5) identifies characteristics of a successful fund raiser. Schrader and Bolton (15) detail characteristics of the ideal fund development professional. Ciervo (8) offers a list of suggestions that are intended to help the development professional increase professionalism, performance and productivity. Payton (14) identifies certain skills that the development officer should possess. Chandler (7) suggests that the success of the development officer depends upon skills in management and planning, sales and marketing, communication, and educative and research roles.

No studies have been identified that relate to the development function in the charitable home for the aged. This underscores the importance of the contribution made by the study to the understanding of the fund development function in charitable homes for the aged.
CHAPTER BIBLIOGRAPHY


CHAPTER III

PROCEDURES OF THE STUDY

Introduction

The purpose of this study is to identify and describe the educational and experiential characteristics and job functions of developmental directors in charitable homes for the aged. Particular emphasis is placed on actual and needed educational preparation for the position. An explanation of the procedures that were used to achieve the purpose is presented in this chapter.

Design of the Study

A mailed questionnaire is used to identify the personal, educational, and experiential characteristics and the job functions of development directors in charitable homes for the aged. This is the most efficient means of contacting individuals over a widespread geographical area. The mailed questionnaire allows one to obtain accurate specific responses to numerous questions in a convenient manner.

Population of the Study

The population studied using descriptive statistics were 29 development directors employed in charitable homes for the aged in Arkansas, Louisiana, Oklahoma, New Mexico
and Texas. These include facilities that are church sponsored and affiliated, have fraternal sponsorship, have nonprofit foundation sponsorship or have other nonprofit corporation ownership. All of these facilities are tax exempt entities whose donors would receive a tax consideration for a gift, and the revenues to the organization from gifts are not taxed.

A survey form was sent to the chief executive officer of each of the 193 nonprofit homes for the aged in this five state area. The purpose of the survey was to determine which homes had functioning fund development programs and employed a development director or designated someone to direct the organization's development activities on a full-time basis. The responses were elicited through the mailing of two rounds of forms. The second round to those who did not respond to the first mailing. The remainder of the non-respondents to the survey were contacted by telephone. Twenty-nine indicated that they had formally established a fund development program. Forty-eight homes indicated they had no formal program but that they had a person whose part-time responsibility it was to conduct fund raising activities or that this activity fell within the role of the chief executive officer. One hundred sixteen homes indicated that no formal program existed and no one was designated to coordinate fund raising activities.
Survey Instrument Development

A questionnaire was developed after a review of related literature on the job functions and on the personal and educational characteristics of developmental directors. Instrument development focused on the primary factors that are thought to influence the performance of a development director. These factors are job functions, personal, educational, occupational and social characteristics. Educational and experiential factors are also explored to identify useful and needed experiences in formal educational preparation. A brief outline of the questionnaire follows.

Outline of the Development Directors
Survey Form

Personal Factors:
- Marital Status
- Age
- Sex
- Salary Level

Job Functions:
- Position title
- Length of time in position
- Specific Job tasks
- Fundraising goal

Background Factors:
- Prior experience
Specific Job tasks

Internships

Educational Factors:
- Past Job Specific Training or Education
- Recent Job Specific Training or Education
- Educational Level Achieved

Social Factors:
- Organizational Membership

The initial outline for the questionnaire was derived from a review of relevant books, professional journals, personal work experiences, and discussion with experts in the field.

After the first drafts of the questionnaire were discussed with the researcher's advisor, the revised instrument was submitted to a panel of two experts who are actively involved in development director fund raising activities. On their recommendations, revisions and changes were made and the instrument was printed in final form.

A pilot study was conducted for the questionnaire using three development directors. Content revisions were made a second time as indicated by the results of the pilot study.

Survey Procedures

A questionnaire was mailed to charitable homes for the aged to identify which employed a development director or had an individual responsible for fund raising as an
integral part of their job. Following this a questionnaire was mailed to the identified fund development directors. The response rate was 38 percent. A second mailing of questionnaires was done to bring the response rate to a total of 52 percent.

Procedures for Analyzing the Data

The Statistical Packages for the Social Sciences (SPSSX) and the university computer services were used in the analysis of data. Responses to the items on the questionnaire were coded by number. Unstructured items were analyzed first by content analysis followed by numerical coding.

A program was used for the survey that included crosstabulation of social characteristics, success in fund raising, length of time in position and educational preparation. Coded responses were manually typed into the computer.

To accomplish the desired analysis, percentages and frequencies were used to treat the data. These non-parametric procedures provide an understandable overview of the data obtained and are appropriate for the research questions. These procedures permit a summarization of the data in a manageable form.

Following the tabulation of frequencies and percentages, Fischer's Exact Probability Test was computed
to determine if significant relationships between actual preparation and needed preparation, personal characteristics, educational preparation, and success and usefulness of experience exist.

Summary

The focus for the collection and analysis of data in this study is the identification of personal, educational, and experiential characteristics and the job functions of development directors in charitable homes for the aged. Questionnaires were mailed to persons identified as fund development directors in charitable homes.
CHAPTER IV

ANALYSES OF DATA FINDINGS

Introduction

This study identifies and describes the job functions and the social, educational, and experiential characteristics of fund development directors in charitable homes for the aged. Areas of needed educational programs are also assessed.

This chapter includes the statistical treatment and analyses of data collected. The data are presented and analyzed in accordance with the research questions designed for the purposes of this study.

Personal Characteristics

Respondents to the questionnaire were asked to provide information about their age, sex, marital status, and salary level. Table I presents a profile of the subjects. The mean age of the fifteen respondents was 48.7 years, and the median age was 52 years. Eleven of the respondents were male. All but 3 of the respondents were married, and the reported salary level was equally divided between the three categories.
### TABLE I

**PERSONAL CHARACTERISTICS OF THE SAMPLE**

<table>
<thead>
<tr>
<th>Variable</th>
<th>F</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age Groups</strong></td>
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</tr>
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<td>29 to 39 years</td>
<td>3</td>
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<tr>
<td>40 to 49 years</td>
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<td>26.7</td>
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<tr>
<td>50 to 59 years</td>
<td>5</td>
<td>33.3</td>
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<tr>
<td>60 to 67 years</td>
<td>3</td>
<td>20.0</td>
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<tr>
<td><strong>Sex</strong></td>
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<td>Male</td>
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<tr>
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<td><strong>Marital Status</strong></td>
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<td><strong>Salary Level</strong></td>
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<tr>
<td>20K to 40K</td>
<td>5</td>
<td>33.3</td>
</tr>
<tr>
<td>Over 40K</td>
<td>5</td>
<td>33.3</td>
</tr>
</tbody>
</table>

The modal practitioner is a male who is 50 to 59 years of age, married with an annual salary in the $20,000 to $40,000 range. The second career nature of these positions is possibly the reason that the age is fairly high.

**Job Functions of Development Directors**

Research Question one refers to the job functions that fund development directors perform in charitable homes for the aged. Five areas were investigated relative to job
functions: 1) position title; 2) length of time in position; 3) amount of time spent in role; 4) specific job tasks; and 5) achievement of fundraising goal.

**Position title.**—Three of the fifteen respondents listed their title as administrator or executive director. Two listed their title as vice-president for development. One individual was a resource coordinator. Three of the respondents listed a dual title involving development and public relations. One individual was director of development and assistant chaplain, and another director of community relations and planned giving. And, one individual held three titles: resource development coordinator; inservice coordinator; and purchasing agent. Eleven of the job position titles listed included the term development. None of the titles listed included the word fund. Although the literature in development work in general refers to fund development, charitable homes for the aged do not use this more descriptive term in association with the titles for these positions.

**Length of time in position.**—The length of time spent in their current positions by the respondents ranged from 3 months to 12 years. The mean was 3.65 years and the median 2 years. Table II presents the data.
TABLE II
LENGTH OF TIME IN CURRENT POSITION

<table>
<thead>
<tr>
<th>Time</th>
<th>F</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than one year</td>
<td>2</td>
<td>13.3</td>
</tr>
<tr>
<td>One to two years</td>
<td>6</td>
<td>40.0</td>
</tr>
<tr>
<td>Three to five years</td>
<td>4</td>
<td>26.7</td>
</tr>
<tr>
<td>More than five years</td>
<td>3</td>
<td>20.0</td>
</tr>
</tbody>
</table>

The relative newness of this function in charitable homes is reflected in the fact that most of the respondents have been in the fund development position for a short period of time. This could also be an indication of personnel turn-over in these positions in charitable homes.

Time spent in fundraising activities.--Ten of the respondents worked part-time in the fund development function and five were employed full-time in fund development. They were all nevertheless full-time employees of the homes. Table III reflects the percentage of the respondents work time that was allotted to fund development. The data reflects the multiple positions held by many of the respondents.
### TABLE III

PERCENTAGE OF TIME SPENT IN FUNDRAISING ACTIVITIES

<table>
<thead>
<tr>
<th>Percentage of Time</th>
<th>F</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Five percent</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Twenty percent</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Twenty-five percent</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Forty percent</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Fifty percent</td>
<td>5</td>
<td>33.3</td>
</tr>
<tr>
<td>Sixty percent</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>One hundred percent</td>
<td>5</td>
<td>33.3</td>
</tr>
</tbody>
</table>

Other administrative activities of the charitable home account for the majority of the remainder of the time the development director spent in non-fund development job functions. These are possibly very closely related activities that were not addressed among the listing of job tasks and/or not perceived to be related tasks by the respondent. This also reflects the diversity of the position which may also be related to the relative newness of such functions in the charitable home.

**Specific job tasks.**--Respondents were asked to indicate amount of time, in percentages, that they expended on specific fund development activities in their current position and for a prior position in fund development. Table IV presents the information provided by 5 respondents for a prior position and by 14 respondents for their current position.
TABLE IV

PERCENTAGE OF TIME SPENT ON SPECIFIC FUND DEVELOPMENT JOB TASKS IN PRIOR AND CURRENT POSITION

<table>
<thead>
<tr>
<th>Task</th>
<th>Prior Position Percentage</th>
<th>Current Position Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N₁  N₂  Range  Mean</td>
<td>N₁  N₂  Range  Mean</td>
</tr>
<tr>
<td>Volunteer training</td>
<td>0   5   0-00  0.0</td>
<td>6   14  0-55  6.6</td>
</tr>
<tr>
<td>Grant applications</td>
<td>2   5   0-25  5.0</td>
<td>2   14  0-05  0.4</td>
</tr>
<tr>
<td>Mail solicitation</td>
<td>3   5   0-15  7.0</td>
<td>13  14  0-30  14.8</td>
</tr>
<tr>
<td>Special fundraisers</td>
<td>3   5   0-25  10.0</td>
<td>10  14  0-25  8.2</td>
</tr>
<tr>
<td>Foundation solicitation</td>
<td>4  5  0-80  38.0</td>
<td>9   14  0-60  14.3</td>
</tr>
<tr>
<td>Planned giving solic.</td>
<td>3  5  0-20  10.0</td>
<td>12  14  0-45  15.4</td>
</tr>
<tr>
<td>Corporate solicitation</td>
<td>4  5  0-20  10.0</td>
<td>6   14  0-30  5.1</td>
</tr>
<tr>
<td>Publications</td>
<td>3   5   0-20  7.0</td>
<td>10  14  0-40  13.6</td>
</tr>
<tr>
<td>Other</td>
<td>2   5   0-50  13.0</td>
<td>7   14  0-50  13.6</td>
</tr>
</tbody>
</table>

*N₁ = number of respondents reporting activity in task; N₂ = total N possible.

The relative lack of specific fund development activities in past positions is evident. The increasing sophistication of these positions is apparent by the consistency of responses in several areas that also account for the largest amount of time for the respondent.

The activities of mail solicitation, foundation solicitation, planned giving, and publications accounted for the greatest percentage of the fund development officers time in their current position and were cited with greater frequency than the other activities listed. Foundation solicitation occupied the greatest percentage of time during the prior positions. Time spent on grant applications was greater for the prior positions than for
the current positions. The time allotted to other activities may reflect the fact that several of the positions were part-time in the function of fund development and combined with another position.

**Attainment of fundraising goal.**—Respondents were asked who sets their fundraising goal and to state whether the goal was exceeded, met, or not met for the years 1981 through 1986. In seven instances the fundraising goal was set by the executive director. Four of the fund development directors set the goal themselves. Three individuals stated that the goal was set by their board of directors, and in one instance the goal was set by committee. In response to the question on attainment of the established fund raising goal for the years 1981 through 1986, the information was limited for the years 1981 through 1984. With the exception of 1983, the established goal was met or exceeded by over 75 percent of the directors who answered the question. Table V presents the data.

**TABLE V**

GOAL ACHIEVEMENT FOR THE YEARS 1981 TO 1986

<table>
<thead>
<tr>
<th>Year</th>
<th>Exceeded</th>
<th>Met</th>
<th>Not Met</th>
<th>No Program</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1981</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>1982</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>1983</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>1984</td>
<td>2</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>1985</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>1986</td>
<td>5</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>
Subsequently, the data on goal achievement was classified in two parts, goal achieved or goal not achieved, and examined to determine if goal achievement was related to sex, age group (over or under 50), length of employment (two years or less and more than two years), employment status (full or parttime) and by education (no college degree or college degree). Fisher’s exact probability test was employed and in all cases was found to be non-significant.

Based on the data the answer to research question one may be summarized as follows.

1. The position titles of the fund development directors surveyed include the word development, but not the word fund. The development director frequently holds more than one title (position), or as in 33 percent of this sample the position may be component of the administrator or executive director’s position.

2. The respondents had been in their current position in fund development an average of 3.65 years, with eight of the fifteen employed 2 years or less and only 3 more than 5 years.

3. For ten or 66.7 percent of the sample, the role in fund development was a part-time position. The role of the fund development director was combined with other duties in most instances.

4. The activities of planned giving, mail solicitation, foundation solicitation, and publications
were listed more frequently and allotted more work time by the respondents in reference to their current positions. The area of grant application was not an important component of the respondents work in fund development. For the prior positions more time was allotted to foundation solicitation than to any other task. Other areas of emphasis during the prior positions were special fundraisers, planned giving, and corporate solicitation.

5. Achievement of the annual fund raising goal for the years 1981 to 1986 was over 75 percent for each year excluding 1983 when the percentage was 66.7. Examination of goal achievement using Fisher’s exact probability test revealed no significant differences within the sample on the variables of age, sex, education, length of employment, and type of position (full or part-time).

Organizational Memberships Characteristics

Research Question two sought information on the professional, social-faternal, service, church, and other organizational memberships of those involved in fund development. Fourteen of the fifteen respondents supplied information on their organizational membership. Table VI summarizes the data.
TABLE VI
ORGANIZATIONAL MEMBERSHIP

<table>
<thead>
<tr>
<th>Type of Organization</th>
<th>0*</th>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional</td>
<td>4</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>Social-Fraternial</td>
<td>10</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Service</td>
<td>8</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Church</td>
<td>3</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

*Not reporting

The most frequently listed organizational membership was the National Society of Fund Raising Executives with six subjects citing the organization. Other professional organizations listed included the Association of Lutheran Development Executives, American College of Health Care Administrators, and the American Society of Professional and Executive Women. None of the organizations, other than the National Society of Fund Raising Executives was cited by more than two of the respondents.

Only 4 of the 14 respondents reported membership in a social-fraternal organization. Organizations listed included Rotary, The International Good Neighbor Council, Mensa, and an alumni association.

Six of 14 respondents reported belonging to a service organization, 4 with membership in one organization and 2 listing two service organizations. Organizations listed
included YMCA and Camp Fire Boards, Civitan International, Rotary, and two military related organizations.

Eleven of the fourteen or 78.6 percent of the respondents reported belonging to a church. Three individuals responded they were not church members. The specific denominations listed were all Protestant.

This response is not surprising since all of the respondents represented church related organizations. Membership in the church sponsoring the charitable home is apparently not a universal requirement and may not be a factor at all.

Only two individuals listed memberships in other types of organizations. Organizations listed included American Association of Retired Persons, Aircraft Owners and Pilot's association, and the Cousteau Society.

Organizational membership by those involved in fund development appeared to be limited primarily to church and professional organizations, most notable The National Society of Fund Raising Executives. Membership in other types of organizations though limited revealed that a number of respondents assumed leadership roles in highly respected organizations. The limited amount of membership in these organizations may be related to the fact that organizational membership is not perceived as important by the development directors.
Educational and Experiential Characteristics

Research Question three is concerned with the educational and experiential characteristics of fund development directors in charitable homes for the aged. In this section data relative to the educational, prior occupational experiences, and special work experiences, such as a mentor or internship are examined.

Prior Occupational Experience

Five of twelve (41.7 percent) respondents reported that they had held a previous position in fund development. None of the prior positions was associated with a home for the aged. Two of the prior positions were associated with a university, two were with a religious organization, and one position was with a community agency. Only two individuals reported having held more than two positions in the field of fund development. Table VII presents the data.

| TABLE VII |
| FREQUENCY OF PRIOR EXPERIENCE, MENTOR RELATIONSHIPS AND INTERNSHIPS IN FUND DEVELOPMENT |

<table>
<thead>
<tr>
<th>Variable</th>
<th>Yes</th>
<th>%</th>
<th>No</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior development experience</td>
<td>5</td>
<td>41.7</td>
<td>7</td>
<td>58.3</td>
</tr>
<tr>
<td>Mentor relationship</td>
<td>5</td>
<td>55.5</td>
<td>4</td>
<td>44.5</td>
</tr>
<tr>
<td>Internship</td>
<td>0</td>
<td>0.0</td>
<td>9</td>
<td>100.0</td>
</tr>
</tbody>
</table>
Respondents reported working at a wide variety of occupations prior to their assumption of a position in fund development. Three individuals had previously served as church pastors, one for 25 years, one for 32 years, and another for 43 years. Three individuals reported experience in upper level management positions in private industry and business. Experiences as an administrator, practical nurse, teacher, and military officer were also reported. Most of the positions reported were responsible management type positions.

Special Work Experiences

Respondents were asked to identify special work experiences, such as an internship or mentor relationship, that helped prepare them for their role in fund development. Four individuals responded, "none." Five subjects identified a type of mentor relationship as being helpful. In three of the five cases, the mentor was identified as a professional fund development officer or consultant associated with the employing agencies home or central office. No one reported having an internship in fund development. Internship experiences in charitable homes are non-existent due to the lack of formal education programs in fund development.

Educational Factors

For this area respondents were asked about formal education beyond high school, and about attendance at
seminars or short courses prior to and during their tenure as fund development officers. Table VIII displays the findings related to formal education and Table IX depicts the findings relative to the seminars and short courses attended.

**TABLE VIII**

**LEVEL OF FORMAL EDUCATION COMPLETED**

<table>
<thead>
<tr>
<th>Degree</th>
<th>F</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Bachelors</td>
<td>7</td>
<td>46.7</td>
</tr>
<tr>
<td>Masters</td>
<td>2</td>
<td>13.3</td>
</tr>
<tr>
<td>Doctorate</td>
<td>1</td>
<td>6.7</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>26.7</td>
</tr>
</tbody>
</table>

Examination of the formal education backgrounds of the respondents revealed that 66.6 per cent or ten held a bachelor’s or higher university degree. One individual reported no formal education beyond high school. Two of the respondents had completed non-degree programs, one as a licensed practical nurse and the other in nursing home administration. Only 1 individual was currently working on a bachelors degree. Over 10 different fields of study were listed by the respondents holding college degrees. Only 2 individuals reported completion of a university program with a focus on the elderly, 1 with a master’s in aging and the other a doctorate with a minor in gerontology. Fields of study cited included marketing
communications, history, theology, philosophy, sociology, physical education, English, drama, and mathematics.

Respondents were requested to identify the topics of specialized training they had received in short courses or seminars. Additionally, they were asked to identify the type of sponsoring organization (university, professional, religious) and to categorize the course as useful or not useful to them in their role in fund development. Table IX displays the findings.

**TABLE IX**

SEMINARS AND SHORT COURSES WITH TYPE OF SPONSOR COMPLETED PRIOR TO AND DURING CURRENT POSITION

<table>
<thead>
<tr>
<th>Topic</th>
<th>Prior Position</th>
<th>Current Position</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>U  P  R  0</td>
<td>U  P  R  0</td>
</tr>
<tr>
<td>Volunteer training</td>
<td>1  2</td>
<td>2  2</td>
</tr>
<tr>
<td>Grant application</td>
<td>2  3</td>
<td>1  1</td>
</tr>
<tr>
<td>Personal solicitation</td>
<td>1  3  1  1</td>
<td>5  3</td>
</tr>
<tr>
<td>Mail solicitation</td>
<td>4  4</td>
<td></td>
</tr>
<tr>
<td>Charitable bequests</td>
<td>5  5</td>
<td></td>
</tr>
<tr>
<td>Special fund raisers</td>
<td>1  3</td>
<td>4  2</td>
</tr>
<tr>
<td>Foundation solicitation</td>
<td>4  1</td>
<td>4  1</td>
</tr>
<tr>
<td>Planned giving solic.</td>
<td>4  9  1</td>
<td></td>
</tr>
<tr>
<td>Corporate solicitation</td>
<td>1  3</td>
<td>4  1</td>
</tr>
<tr>
<td>Publications</td>
<td>1  1</td>
<td>2  2</td>
</tr>
<tr>
<td>Other</td>
<td>1  3</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>7  34  3  1</td>
<td>5  35  1  12</td>
</tr>
</tbody>
</table>

U = University  P = Professional  R = Religious  O = Other

Examination of the data revealed that the majority (73.3 percent) of the courses or seminars attended were
sponsored by a professional organization. Five (7 percent) of the 69 courses offered by a professional organization were judged as not useful. In comparison, courses offered by a university accounted for 12 percent of the courses cited, two (16 percent) of which were judged not useful. Few programs offered by a religious organization were listed. The respondents did not identify the sponsoring organization associated with the 13 courses listed under other, 12 of which were attended during the time of the respondents current position.

Examination of the topics covered in the seminars revealed the topics of planned giving and personal solicitation were cited 14 times each, followed by the topics of mail solicitation, special fund raisers, and foundation solicitation with frequencies of 11, 10, and 10 respectively. Courses on grant application, volunteer training, and public relations were listed less frequently, 8, 7, 6 six times respectively. Courses in these areas are either not available or seen as less important activities by the respondents.

Examination of the experiential and educational experiences of the respondents relative to Research Question three revealed the following facts.

1. Five of the fifteen respondents (33 percent) had held a previous position in fund raising, none of which were associated with a home for the aged.
2. The respondents were employed in a wide variety of occupations prior to their position in fund development. Areas as diverse as the ministry, aerospace, textiles, nursing, teaching, and the military were cited.

3. None of the respondents had completed an internship, and a third reported a mentor relationship. The mentor relationship usually involved a professional development officer associated with the employing agency's main office. This may signify an on-the-job type of training situation.

4. Examination of the formal educational backgrounds of the respondents found very little commonality. Thirty-three percent of the sample of fifteen did not hold a bachelor's degree, and another 33 percent held a masters degree or higher. Major areas of study were almost as numerous as the number of respondents.

5. The majority of the short courses attended by the respondents were sponsored by a professional organization, 73 percent compared to 12 percent sponsored by a university.

6. Courses in planned giving, personal solicitation and mail solicitation had the greatest frequencies of attendance. The courses in grant writing, volunteer training and public relations were cited less frequently.
Recommendations of Fund Development Directors

Research Question four asked fund development directors to recommend what they view as valuable to their role. The directors were asked to identify specific college courses and organizational memberships, and to rank the importance of specified fund development activities. Finally, the need for university based programs of study were assessed.

When asked to identify specific college courses or curriculum that helped prepare them for their role in fund development, six of the fifteen respondents replied, "none" and three gave no response. Four individuals listed one course. Seven useful courses were listed by one individual and five by another. English composition was listed by three individuals. The related areas of speech, communication, and public and interpersonal relations were listed by five individuals. Courses in church management were cited twice, and courses in sociology and psychology were cited once. Sixty-two per cent of the courses listed were specifically related to communication, either oral or written.

When asked to identify specific organization or association memberships that were useful to them in their role in fund development, six individuals stated, "none," and six individuals listed the National Society of Fund Raising Executives. Other organizations listed included
the Texas Presbyterian Foundation, Lutheran Development Association, Public Relations Society of America, Texas Association of Homes for the Aged, and the American Association of Homes for the Aged.

To determine the importance of certain activities to a fund development director, the respondents were asked to rank in order of importance the 9 specified activities. The activities to be ranked were: volunteer training; government grant application; personal solicitation; mail solicitation; special fund raiser; corporate solicitation; special fund raisers; planned giving; and public relations/journalism. Table X presents the mean rank for each activity in order of descending importance (a mean value of 2 indicates greater value than a value of 5).

**TABLE X**

**RANKING OF DEVELOPMENT ACTIVITIES BY IMPORTANCE TO FUND DEVELOPMENT ROLE**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Mean Rank</th>
<th>Minimum value</th>
<th>Maximum value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal solicitation</td>
<td>2.93</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Mail solicitation</td>
<td>3.14</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>Planned giving</td>
<td>3.64</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Publications</td>
<td>4.32</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Special fund raisers</td>
<td>5.07</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Foundation solicitation</td>
<td>5.29</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Volunteer fund raiser training</td>
<td>5.43</td>
<td>2</td>
<td>9</td>
</tr>
<tr>
<td>Corporate solicitation</td>
<td>5.96</td>
<td>5</td>
<td>9</td>
</tr>
<tr>
<td>Government grant application</td>
<td>8.21</td>
<td>6</td>
<td>9</td>
</tr>
</tbody>
</table>
Calculation of the Kendall coefficient of concordance was performed to determine if there was agreement between the respondents on the ranking of the importance of the activities. The resultant value of $W$ (.4401) was tested for significance using a chi-square value of 49.29 and 8 degrees of freedom. The test was significant at $p<.0001$. The respondents were not in agreement.

The ranking of fund development activities was examined using the Mann-Whitney U test to determine if differences existed between the respondents on the variables age, length of employment, education, prior development experience, time of position, and sex. The respondents were divided into groups on each of the variables. The variable age was divided into those fifty and under and those over fifty. Length of employment was divided at two years or less and more than two years. Education was divided into no college degree and college degree. Prior development experience was classified as yes or no, and time of position was full or part-time. The resultant mean ranks are presented in Table XI. Obtained probabilities of less than .10 are identified. The small sample size and exploratory nature of the study justify the use of this level of significance.

The fund development directors responding to the questionnaire were asked to answer yes or no to three questions pertaining to the need for educational programs
TABLE XI
MEAN RANK OF IMPORTANCE OF DEVELOPMENT ACTIVITIES BY PERSONAL,
EDUCATIONAL AND EXPERIENTIAL CHARACTERISTICS

<table>
<thead>
<tr>
<th>Factor</th>
<th>Voluntary Training</th>
<th>Government Application</th>
<th>Personal Solicitation</th>
<th>Mail Solicitation</th>
<th>Foundation Solicitation</th>
<th>Solicitation</th>
<th>Corporate Solicitation</th>
<th>Planned Giving</th>
<th>Public Relations</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Group</td>
<td>5.73</td>
<td>8.50</td>
<td>3.07</td>
<td>3.67</td>
<td>5.27</td>
<td>5.27</td>
<td>7.21</td>
<td>3.87</td>
<td>4.37</td>
<td>15</td>
</tr>
<tr>
<td>Thru 50</td>
<td>6.58</td>
<td>8.29</td>
<td>3.29</td>
<td>3.71</td>
<td>5.14</td>
<td>5.43</td>
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<td>2 years or</td>
<td>4.50**</td>
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<td>7.00</td>
<td>5.00</td>
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* *<sub>p<.05</sub>; **<sub>p<.10</sub>

Note: The larger the value of the mean rank the lower the importance of the activity.
in a university setting. Table XII presents the findings. Examination of the data reveals that 93.3 percent or fourteen of the fifteen respondents feel there is a need for university course work in fund development methods. Thirteen or 88.7 percent of the respondents felt a need

TABLE XII

NEED FOR UNIVERSITY PROGRAMS IN FUND DEVELOPMENT

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Frequency</th>
<th>Percent</th>
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<tr>
<td>Does a need exist for university course work in fund development?</td>
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<td>1</td>
<td>6.7</td>
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<tr>
<td></td>
<td>Yes</td>
<td>14</td>
<td>93.3</td>
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<td>Does a need exist for university specialization or major?</td>
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</tr>
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<td></td>
<td>Yes</td>
<td>13</td>
<td>86.7</td>
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<td>Does a need exist for university degree program?</td>
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<td>8</td>
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<tr>
<td></td>
<td>Yes</td>
<td>7</td>
<td>46.7</td>
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</table>

existed for a university specialization or major in fund development. On the question on the need for a university degree program in fund development the group was almost equally divided. Eight or 53.3 percent of the group said there was not a need and seven (46.7 percent) said there was a need for a degree program. By use of Fisher’s exact probability test it was determined that no significant differences existed between the subgroup of age, length of employment, education, previous development experience, time, and sex and the answer to questions one or two. On
the question relating to the need for a university degree program, significant differences were found between those with a college degree and those without a degree and between males and females. Seven of the ten individuals holding a college degree compared to none of the five without a degree felt the need existed for a degree program ($p = .021$). Seven of the eleven male respondents compared to none of the four females felt there was a need for such a program.

Relative to Research Question four the following may be stated concerning what fund development directors feel to be important to their role.

1. College courses in the area of communications, in particular English, composition are valuable.

2. Membership in the National Association of Fund Raising Executive was cited as important by 6 of the 15 respondents.

3. Respondents were not in agreement in their ranking of the importance of specific activities to their role. Significant differences found were most often attributable to differences in prior experience in fund development and the sex of the respondent.

4. The activities of personal solicitation, mail solicitation, and planned giving were rated most important and grant activity was ranked least important.
5. The majority of the respondents felt there was a need for university course work and a university major or specialization in fund development.

6. On the need for a university degree program the group was almost equally divided. Those without a college degree and females did not believe a need existed for such a degree.

Summary of Data Findings

An analysis and interpretation of the data obtained by this study reveals the following major findings.

1. The majority of charitable homes do not have formalized fund development programs nor do they have an identified fund development function. Only 15 percent of the 193 charitable homes in this five-state area have formalized fund development programs and employ a full-time person with at least part-time responsibility for fund development activity.

2. The development director frequently holds more than one title or position within the organization. Six of nine respondents employed full time held two or more job titles. For ten or 66.7 percent of the sample, the role in fund development was a part-time position.

3. The activities of planned giving, mail solicitation, foundation solicitation, and publications were cited more often and allotted a greater percentage of the director's work time, than the activities of volunteer
training, special fund raising, personal solicitation, and grant writing.

4. Four or 26.6 percent of the development directors established their agency's annual fund raising goal. The remainder were set by the Executive Director or the Board of Directors of the charitable home.

5. Achievement of the annual fund raising goal for the years 1981 to 1986 exceeded 75 percent for each year excluding 1983, when the percentage was 67. Examination of goal achievement using Fisher's exact probability test revealed no significant differences within the sample on the variables of age, sex, education, length of employment, or type of position (full- or part-time).

6. Organizational membership was limited primarily to the National Association of Fund Raising Executives (6 of 15 respondents) and to church (11 of 15 respondents).

7. The respondents were employed in a wide variety of occupations prior to their current position. Only one-third cited previous experience in fund development.

8. None of the respondents had completed an internship in fund development, and five (33 percent) of the respondents reported a mentor relationship.

9. Examination of the formal educational backgrounds of the respondents revealed that one-third did not hold a bachelor's degree, one-third held a bachelor's degree, and one-third held a master's or higher degree.
10. Major fields of study cited were as numerous as the number of respondents.

11. The majority of short courses attended by the respondents were sponsored by a professional organization, 73 percent compared to 12 percent sponsored by a university.

12. Seminars with topics of planned giving, personal solicitation, and mail solicitation had the greatest frequency of attendance.

13. College courses in the area of communications, in particular English composition, were cited as valuable in preparing one for a role in fund development. Sixty-two percent of the courses listed were in the area of communication, either oral or written.

14. Respondents were not in agreement in their ranking of the importance of specific activities to their role. Significant difference found within the sample were most often attributable to differences in prior experience in fund development (prior experience or no prior experience).

15. The activities of personal solicitation, mail solicitation, and planned giving were rated most important, and grant activity was least important.

16. The large majority of respondents felt a need existed for university course work or a university major in fund development.

17. On the need for a university degree program the sample was almost equally divided. Those lacking a college
degree and females did not feel a need existed for such a degree.

Additional findings of interest include the following.

1. The fact that the term fund was not included in any of the job titles listed.

2. The respondents had held their current position in development an average of 3.65 years, with eight of the fifteen employed less than 2 years, and four employed more than 5 years.

3. The activity of foundation solicitation accounted for the largest use of the fund development officers time, an average of 20 percent for current positions.

4. All but 1 of 14 positions reported involved work in the area of mail solicitation, and the average time allotted was 14.8 percent.

5. Involvement in publications was reported by 10 of the 14 respondents.

6. Involvement in the area of government grant application was reported by only 2 subjects.

7. In 46.6 percent of the positions the annual fund raising goal was established by the executive director, and in 20 percent of the positions it was established by the board of directors.

8. Membership in a Protestant church was reported by 78.5 percent of the respondents.
9. None of the 5 previously held positions in fund development were associated with a home for the aged.

10. Areas of previous employment included positions as church pastor, aerospace engineer, textile and computer software salesman, as well as positions in teaching and health care.

11. The majority (93 percent) of the seminars attended by the respondents were classified as useful to them in their role in fund development.

12. Males differed significantly from females in the ranking of the importance of the activities of planned giving and public relations. Females ranked public relations as the most important development activity. Males ranked the importance of planned giving higher than females.

13. The activity of public relations was ranked significantly lower by those under age 50 than by those over 50.

Summary

Respondents to the questionnaire were asked to provide information about their age, sex, marital status and salary level. The modal practitioner is a male who is 50 to 59 years of age, married with an annual salary in the $20,000 to $40,000 range.

Research Question one investigated 5 areas relative to job functions: (1) position title; (2) length of time in position; (3) amount of time spent in role; (4) specific job
tasks; and (5) achievement of fund raising goal. Eleven of the job position titles listed included the term development. The mean length of time spent in their current position was 3.65 years. Ten of the respondents worked part time in the fund development function and five were employed full time in fund development. The activities of mail solicitation, planned giving, and publications accounted for the greatest percentage of the fund development officers time in their current position. Achievement of the annual fund raising goal for the years 1981 to 1986 was over 75 percent for each year excluding 1983 when the percentage was 66.7.

Research Question two sought information on the professional, social fraternal, service, church and other organizational memberships of those involved in fund development. Organizational membership appeared to be limited primarily to church and professional organizations, most notable the National Society of Fund Raising Executives.

Research Question three is concerned with the educational and experiential characteristics of fund development directors in charitable homes for the aged. Only five of the fifteen respondents (33 percent) had held a previous position in fund raising. The respondents were employed in a wide variety of occupations prior to their position in fund development. None of the respondents had
completed an internship, and only one-third reported a mentor relationship. Examination of the formal educational backgrounds of the respondents found very little commonality. The majority of the short courses attended by the respondents were sponsored by a professional organization. Courses in planned giving, personal solicitation and mail solicitation had the greatest frequencies of attendance.

Research Question four asked fund development directors to recommend what they view as valuable to their role. The directors were asked to identify specific college courses and organizational memberships, and to rank the importance of specified fund development activities. Finally, the need for university based programs of study were assessed.

Sixty-two percent of the courses listed were specifically related to communication, either oral or written. When asked to identify specific organization or association membership that were useful to them in their role in development 6 individuals stated "none," and 6 individuals listed the National Society of Fund Raising Executives. To determine the importance of certain activities to a fund development director, the respondents were asked to rank 9 in order of importance. The activities of personal solicitation, mail solicitation, and planned giving were rated most important and grant activity was ranked least important.
The majority of the respondents felt there was a need for university course work and a university major or specialization in fund development. On the need for a university degree program the group was almost equally divided. Those without a college degree and females did not believe a need existed for such a degree.
CHAPTER V

SUMMARY, DATA FINDINGS, CONCLUSIONS, IMPLICATIONS, INFERENCES AND RECOMMENDATIONS FOR THE FUTURE

Summary

The fund development process has been a generally accepted method of financing programs at institutions of higher education, charitable hospitals, charitable community organizations and some charitable homes for the aged. The development director’s role in the charitable home for the aged has not been reported in the literature, although there is ample information concerning the development director in charitable organizations in general.

The first purpose of this study is to develop a profile of job functions, through task analysis, among development directors in charitable homes for the aged. The second purpose of this study is to develop a profile of personal characteristics of development directors of charitable homes for the aged based on the following characteristics: age, sex, educational background, experience outside development, membership in community organizations and amount of specific training in development.

One instrument was used to gather data for the study. It was distributed to a population of 29 development directors in charitable homes for the aged in Arkansas,
Louisiana, Oklahoma, New Mexico and Texas. This population was predetermined by an initial survey form sent to 193 chief executive officers in the five states mentioned above. Twenty-nine reported formalized programs employing a full-time person with at least a part-time involvement in fund development activities. Of the twenty-nine development directors surveyed, fifteen usable instruments were received (52 percent).

Summary of Data Findings

An analysis and interpretation of the data obtained by this study reveals the following major findings.

1. The majority of charitable homes do not have formalized fund development programs nor do they have an identified fund development function. Only 15 percent of the 193 charitable homes in this five-state area have formalized fund development programs and employ a full-time person with at least part-time responsibility for fund development activity.

2. The development director frequently holds more than one title or position within the organization. Six of nine respondents employed full time held two or more job titles. For ten or 66.7 percent of the sample, the role in fund development was a part-time position.

3. The activities of planned giving, mail solicitation, foundation solicitation, and publications were cited more often and allotted a greater percentage of the
director’s work time, than the activities of volunteer training, special fund raising, personal solicitation, and grant writing.

4. Four or 26.6 percent of the development directors established their agency’s annual fund raising goal.

5. Achievement of the annual fund raising goal for the years 1981 to 1986 exceeded 75 percent for each year excluding 1983, when the percentage was 67. Examination of goal achievement using Fisher’s exact probability test revealed no significant differences within the sample on the variables of age, sex, education, length of employment, or type of position (full- or part-time).

6. Organizational membership was limited primarily to the National Association of Fund Raising Executives (6 of 15 respondents) and to church (11 of 15 respondents).

7. The respondents were employed in a wide variety of occupations prior to their current position. Only one-third cited previous experience in fund development.

8. None of the respondents had completed an internship in fund development, and five (33 percent) of the respondents reported a mentor relationship.

9. Examination of the formal educational backgrounds of the respondents revealed that one-third did not hold a bachelor’s degree, one-third held a bachelor’s degree, and one-third held a master’s or higher degree.
10. Major fields of study cited were as numerous as the number of respondents.

11. The majority of short courses attended by the respondents were sponsored by a professional organization, 73 percent compared to 12 percent sponsored by a university.

12. Seminars with topics of planned giving, personal solicitation, and mail solicitation had the greatest frequency of attendance.

13. College courses in the area of communications, in particular English composition, were cited as valuable in preparing one for a role in fund development. Sixty-two percent of the courses listed were in the area of communication, either oral or written.

14. Respondents were not in agreement in their ranking of the importance of specific activities to their role. Significant difference found within the sample were most often attributable to differences in prior experience in fund development (prior experience or no prior experience).

15. The activities of personal solicitation, mail solicitation, and planned giving were rated most important, and grant activity was least important.

16. The large majority of respondents felt a need existed for university course work or a university major in fund development.

17. On the need for a university degree program the sample was almost equally divided. Those lacking a college
degree as well as those who were females did not feel a need existed for such a degree.

Additional findings of interest include the following.

1. The fact that the term fund was not included in any of the job titles listed.

2. The respondents had held their current position in development an average of 3.65 years, with eight of the fifteen employed less than 2 years, and four employed more than 5 years.

3. The activity of foundation solicitation accounted for the largest use of the fund development officers time, an average of 20 percent for current positions.

4. All but 1 of 14 positions reported involved work in the area of mail solicitation, and the average time allotted was 14.8 percent.

5. Involvement in publications was reported by 10 of the 14 respondents.

6. Involvement in the area of government grant application was reported by only 2 subjects.

7. In 46.6 percent of the positions the annual fund raising goal was established by the executive director; and in 20 percent of the positions it was established by the board of directors.

8. Membership in a Protestant church was reported by 78.5 percent of the respondents.
9. None of the 5 previously held positions in fund development were associated with a home for the aged.

10. Areas of previous employment included positions as church pastor, aerospace engineer, textile and computer software salesman, as well as positions in teaching and health care.

11. The majority (93 percent) of the seminars attended by the respondents were classified as useful to them in their role in fund development.

12. Males different significantly from females in the ranking of the importance of the activities of planned giving and public relations. Females ranked public relations as the most important development activity. Males ranked the importance of planned giving higher than females.

13. The activity of public relations was ranked significantly lower by those under age 50 than by those over 50.

Discussion of the Findings

1. The majority of charitable homes report no formalized fund development program or fund development function in existence. Although, whether or not a program has been considered or is in the process of consideration was not asked of the chief executive officer in the survey form.

2. Because the development director frequently holds more than one title or position within the organization it
would seem that the role of the development director could be enhanced if more resources were allocated by the charitable home leadership to the fund development function.

Perhaps the development director in conjunction with the chief executive officer of the charitable home should initiate an organization development process to demonstrate to its board of directors through the use of human resource modeling. Human resource modeling is the visualization of individuals, units and groups that need to interact to achieve organizational goals.

Organization Development is the application of the planning, development, and problem-solving processes to the overall functioning of an organization in such a way that it strengthens the physical, financial, and human resources; improves the process of interface; helps the organization mature; and is responsive to the environment of which the organization is a part (4, p. 105).

3. Since the non-personal contact activities of planned giving, mail solicitation, foundation solicitation, and publications were cited more often and allotted a greater percentage of the director's work time than other specialized prospect contact activities such as volunteer training, special fund raising and personal solicitation it would seem that the respondents are less involved in prospect cultivation activities which are the stereotyped function of the fundraiser.

It can be assumed that these activities that are most cited and involve a greater percentage of time by the
development director are those which are granted the highest priority by the organizational leadership of the charitable home and consequently yield the most significant results toward achievement of the organizational fund raising goal.

Because the cited activities are granted a higher priority in terms of time and resource allocation by the charitable homes' leadership it would be important that persons employed as development directors possess appropriate experiential and educational background to demonstrate proficiency in these areas.

4. Some of the development directors reported setting their agency's annual fund raising goal; this implies an organization that allows the director a great deal of latitude. The development director position in these charitable homes is more likely to be an established executive function that allows the director a greater degree of independent action. However, even if the development director sets the annual fund raising goal the board of directors of a charitable organization would be responsible to finally approve the goal.

5. A relatively high degree of success in achieving the agency's annual fund raising goal denotes sophistication in fund raising goal setting. There were no significant differences between the personal characteristics of those achieving the fund raising goal and those not achieving the agency goal. The personal characteristics of age, sex,
education, length of employment, or type of position (full- or part-time) are not related to success in fund raising. Age, sex and education cannot be regarded as characteristics relative to successful fundraising exclusively when considering an individual for employment as a development director.

6. Many of the respondents reported organizational membership in the National Society of Fund Raising Executives (NSFRE) and a church. NSFRE is a professional organization that sponsors training and educational opportunities for fund raising executives and which an individual does not necessarily need to join to take advantage of educational opportunities. Local chapters are however only located in the metropolitan areas of Dallas-Fort Worth, Houston, Austin, San Antonio and El Paso. Those development directors located in rural charitable homes were least likely to have membership in NSFRE. It is also possible that a development director may not be aware of this association and the possibility of membership if their employment is in a rural charitable home.

7. Development experience is apparently not a requisite for employment as a development director because the respondents were employed in a wide variety of occupations prior to their current positions. Only one-third cited previous experience in fund development. It is
pertinent to note that the respondents all reported having prior management experience in many different jobs.

Management ability and organizational skills are cited as important traits by Broce, Schroder and Bolton, Ciervo, Payton and Chandler those addressing the area of characteristics held by development officers.

8. None of the respondents had completed an internship in fund development. As university curriculum are contemplated practical experience in addition to coursework for entrance into the field of development should be considered.

9. The majority of the respondents reported having formal education attainment at the bachelors level or beyond. Those reporting less than a bachelor’s degree were located in non-metropolitan areas where it may be difficult to locate a degreed person. This can also be a matter of resources. The smaller charitable home with limited revenues were less likely to employ a development director with educational attainment at the bachelor’s level.

10. Since each respondent reported having undergone a different field of study, for the present, there is not a field that is seen as useful preparation for the fund raiser. The variety of educational levels and experiences must be taken into account when considering educational curriculum as well as the content for seminars conducted by
professional organizations involved in education and training.

11. The majority of short courses attended by the respondents were sponsored by a professional organization while few were sponsored by a college or university. This appears to be an area that should be considered by curriculum committees in colleges and universities since fund development professionals in all types of charitable organizations could take advantage of such courses.

12. Because seminars with topics of planned giving, personal solicitation, and mail solicitation had the greatest frequency of attendance it may be considered that these are areas of greatest need for development directors. This fact should be considered when determining the content of courses at the post-secondary level.

13. College courses in the area of communication, in particular English composition, were cited by the respondents as valuable in preparing one for a role in fund development. This fact could be an employment consideration. Those individuals having fields of study with a concentration in the area of communication either written or oral possesses skills that are pertinent to a development director.

14. The variety of organizational structures of development departments and size of the sample contribute to the lack of agreement in their ranking of specific activities to their role as development director. The
importance of the specific fund raising activity depends on the expectation of the development director by the leadership of the charitable home. Those development directors having prior experience rate the activity of personal solicitation, planned giving and foundation solicitation as most important to their role. These are the more seasoned professional who should have a more sophisticated point of comparison.

15. The activities of personal solicitation, mail solicitation and planned giving were rated as most important by the respondents as a group. These activities of mail solicitation and planned giving were also rated as activities that the development director spent the most time with as part of their role. Personal solicitation although perceived as a very important function by the development director is rated low in terms of percentage of time allocation as an activity. Personal solicitation is a fund raising fundamental because it simply involves asking for funds on a one-to-one basis. The most basic of fund raising activities is under utilized as part of the development director's role which implies the need for this basic training and education need.

This need could very well be addressed through education in the area of speech communication. A review of basic communication principles and various personal
solicitation techniques would seem to be needed to address this gap.

16. The large majority of respondents felt a need existed for university course work or a university major in fund development. University course work or a major in fund development would not need to be specific to development in the charitable home. These would however need to be consideration for a course which would address special constituencies or courses that would limit themselves to a particular kind of fund raising sponsoring organization. The specialization that might be relative to a kind of sponsoring organization could be addressed through an internship or an independent study option in the curriculum.

17. On the need for a university degree program the sample was almost equally divided. Those lacking a college degree and females did not feel a need existed for such a degree. Those lacking a college degree and indicating that a need does not exist in this area is a predictable outcome. These are persons who do not feel the need for a college degree in general or else they might have reached that level of educational attainment themselves. Females were also least likely, in this sample, to have attained a college degree. The need for a degree program is not as apparent as the need for a university major or course work in development. The establishment of a degree program has greater and more far reaching consequences. Certainly the
presence of a degree program would stimulate further interest in the area of development. Either a degree program or a major in fund development could affect the availability of course work or short courses to the practicing development director or development officer.

Conclusions

The following conclusions appear justified based upon the major data findings.

1. Since many charitable homes do not have formalized fund development programs the leadership must not be aware of the potential of such programs and continue to use more conventional funding sources.

The establishment of the fund development function should be considered by the chief executive officers and the Board of Directors of the charitable home for the aged. Programs of care and services and educational activities of employees could be enhanced by the establishment of fund development program and activities.

2. The term fund development is not present in the titles of the respondents. It can be assumed that the title of fund development director is not a useful reference except as a descriptor for job tasks within the development director function.

3. Many of the respondents showed a significant amount of time in non-development activities although holding full-time positions. This implies that funding is not
sufficiently available to justify a full-time position in development activities alone.

4. The most useful educational seminars attended by the respondents were sponsored by a professional organization. Only a relatively small amount were sponsored by universities or colleges. Professional organizations seem to be more interested in developing such courses. The topics of choice for the courses were in the areas of the development directors most significant time expenditure in the current position.

5. The college courses that were seen as useful to the respondents were in most cases courses that were specifically related to the area of communication. This implies the importance of developing curriculum that addresses issues of communication in the program content.

6. There seems to be a need for additional university course work in fund development as well as for additional university specialization or major in the field of fund development.

Implications

Based upon a comparison of data findings from this study to those cited in the literature, the following inferences are suggested.

1. It appears that just as Broce (1, p. 113) suggests "the field is where this experience takes place." He also says
that "persons educated and trained in other fields go into the work by chance or because of personal potential, rather than because of demonstrated skills, learning the work by trial and error and attending workshops in the field, conducted by professional fund-raising organizations" (1, p. 137). This will continue to be the case for years to come until useful short courses are developed at the university or college level which meet the professional needs of the development director.

All of the surveyed development directors avail themselves of educational opportunities that relate to their positions in fund development. Chandler (2) stresses the importance of professional improvement and also cites membership in professional organizations as contributing to the success of the development officer. The successful development director will continue to seek educational opportunities which correspond with the needs of the position.

2. As all of the cited authors suggest and is borne out in this study, the work of the development officer requires certain kinds of skills the majority of which relate to communication with the various publics of the organization as well as communication skills to be applied within the organization and on an interpersonal level. Persons possessing these special communication skills will continue to be sought by the charitable home, the skills verified and
the individuals employed. There does not appear to be a substitute for this desirable personal characteristic in a development director.

3. The respondents are all achievers of the fund raising goal set by the organizational leadership. Ciervo (3) suggests that possessing good characteristics is not enough and what really counts is how well the characteristics are applied to performance and productivity. In the final analysis, practitioners are judged not by what they know, but what they accomplish. In other words, if the development director is not successful at meeting the organizational fund raising goal they would not continue to be employed by the charitable home in the position of development director.

Recommendations for the Future

The following recommendations for future research are suggested based upon the findings and conclusions of the study.

1. This study should be replicated for comparison purposes among a population of chief executive officers of charitable homes for the aged.

2. A study should be initiated among a similar population in the future to permit comparison responses to those generated by this study.
3. An analysis of responses to determine if among--and within--group relationships exist for the selected variables should be studied.

4. Fundraising goals relative to the charitable homes' organizational environment should be studied; such organization environmental factors might include size of operating budget, size and classification of the charitable home, and population served.

5. The charitable homes not having formalized fund development programs should be studied to determine their perception of fund development and if they are seeking to incorporate a fund development program into their administrative structure at some future date.
CHAPTER BIBLIOGRAPHY


APPENDIX A
APPENDIX A

FUND DEVELOPMENT QUESTIONNAIRE

1. Code Number ___________ Marital status _______ Age _______ Sex _______

2. Position title ________________________________

3. Length of time in current position ________________________________

4. Full-time fund development _______ Part-time fund development ______
   If part-time, what percentage? __________

5. Current salary level: (Check approximate amount)

   Less than $20,000 ______
   $20,000 - $40,000 ______
   Above $40,000 ______

6. Prior experience in other positions (including military service).

   Title ____________________________ Length of time ____________ Organization ____________
   __________________________________ ___________________________________________________________
   __________________________________ ___________________________________________________________
   __________________________________ ___________________________________________________________
   __________________________________ ___________________________________________________________
   __________________________________ ___________________________________________________________

7. Indicate the kinds of specialized resource development activities you have performed in your most recent previous position and are performing in your present position. (Please check all appropriate functions) Indicate approximate percentage of time, total should equal 100%.

   Development Activities       Prior Position % Time       Current Position % Time
   Volunteer Fundraiser Training ___ ___ ___            ___ ___ ___
   Government Grant Application  ___ ___ ___            ___ ___ ___
   Mail Soliciting               ___ ___ ___            ___ ___ ___
   Special Fund Raisers          ___ ___ ___            ___ ___ ___
   Foundation Solicitation       ___ ___ ___            ___ ___ ___
   Planned Giving Solicitation   ___ ___ ___            ___ ___ ___
   Corporate Solicitation        ___ ___ ___            ___ ___ ___
   Publications                  ___ ___ ___            ___ ___ ___
   Other                        ___ ___ ___            ___ ___ ___
8. Please specify for each educational program post high school your major and minor field of study. Also indicate whether degree is completed or in progress.

<table>
<thead>
<tr>
<th>Degree</th>
<th>Major</th>
<th>Completed</th>
<th>In Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bachelors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Masters</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doctorate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. While in your present position, what specialized training in terms of short courses or seminars have you completed? Indicate the number of completed courses or programs and indicate whether they were useful or not useful.

<table>
<thead>
<tr>
<th>Development Methods</th>
<th>Type of course</th>
<th>Usefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer Fundraiser Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government Grant Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Fund Raisers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planned Giving Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporation Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Relations-Journalism</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. Prior to accepting your present position, what specialized training in terms of college courses or seminar programs had you completed? Indicate the topic of completed courses or programs and indicate whether or not they were useful to your role as a fund officer.

<table>
<thead>
<tr>
<th>Development Activity</th>
<th>Type of course</th>
<th>Usefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant Application</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Individual Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Charitable Bequests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Fund Raisers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation Solicitation</td>
<td></td>
<td></td>
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<tr>
<td>Planned Giving Solicitation</td>
<td></td>
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<tr>
<td>Corporation Solicitation</td>
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<tr>
<td>Public Relations-Journalism</td>
<td></td>
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<tr>
<td>Other</td>
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<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11. Rank in order of importance the ten areas that you consider most valuable to your position. (Use one as the most important).

- Volunteer Fundraiser Training
- Government Grant Application
- Personal Solicitation
- Mail Solicitation
- Foundation Solicitation
- Special Fund Raisers
- Corporate Solicitation
- Planned Giving Solicitation
- Public Relations-Journalism

12. Identify the specific college courses or curriculum that prepared you for your role in fund development.

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13. Identify the specific association or organizational membership activities that prepare you for your role in fund development.

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- 


14. Identify the special work experience (such as an internship or mentor relationship) which prepared you for your role in fund development.


15. Is there an annual goal identified for your fund raising activities?  
(Circle one) Yes No

16. Who sets your annual fund raising goal? (Check the one most applicable)  
A. Board of Directors D. Self  
B. Committee Process E. Other (Please indicate)  
C. Chief Executive Officer

17. Indicate whether institutional fund raising goal was met or exceeded, during past six years?

<table>
<thead>
<tr>
<th>Year</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1981</td>
<td>1984</td>
</tr>
<tr>
<td>1982</td>
<td>1985</td>
</tr>
<tr>
<td>1983</td>
<td>1986</td>
</tr>
</tbody>
</table>

18. What percentage of your current efforts (1986-1987) are directed to the following fund development activities?  

   Capital building program %
   Annual Operations %
   Endowments %
19. Personal organizational membership? (Please list memberships)

Professional

Social-Frateranal

Service

Church

Other

20. Do you think a need exists for university course work in fund development methods?

Yes No

21. Do you think a need exists for university specialization or major in fund development programming?

Yes No

22. Do you think a need exists for a university degree program in fund development?

Yes No
APPENDIX B
Dear Non-Profit Administrator,

I would like your help in gathering certain information concerning the staff member in your organization responsible for fund development.

They will be receiving a questionnaire at a later time. The purpose of my gathering this information is for the development of our fund program and also a professional paper regarding the characteristics of a successful development director.

Doug Wuenschel
Administrator

1) Does your facility have a fund development program?
(Circle One) Yes No

a) If yes... What is the position, title, name, and address of the person responsible for the program?

b) The position is:

   Full-time ______

   Part-time ______

c) Are there other employees reporting to the fund development person?

   (Circle One) Yes No

2) If your facility does not have a formalized program, what is the position, title, and name of the person that does any sort of fund raising activities while substantially employed in another responsibility? __________________________
June 6, 1987

Dear Development Director,

Previous contact with your agency indicated that you as a fund development director would be helpful in determining job characteristics, job functions and educational needs for fund development officers in charitable homes for the aged. The position of the development officer in charitable homes for the aged has become more important as the federal funding has diminished and the number of elderly have increased. It is hoped that the results of this study will help in determining the educational needs and characteristics of fund development directors.

This study is part of the requirement for completion of the doctoral program at North Texas University in higher education administration and aging studies. In addition, my work experience for the past twenty years in administration of charitable homes for the aged has made me acutely aware of the important role of the fund development officer.

I would appreciate your assistance in this effort by completing the enclosed questionnaire. Please complete and return the questionnaire in the stamped envelope enclosed by July 15th if possible. If you have any questions concerning the study or its results, feel free to contact me.

Your assistance is greatly appreciated.

Doug Wuenschel
Administrator
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