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A thematic analysis of fundraiser characteristics in high-quality major donor fundraising relationships in US higher education

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Abstract

As nonprofits increasingly rely on large contributions, skillful major gift fundraisers are more important than ever. In contrast to the vast research on donor motivations, there are few examinations of fundraisers or fundraising relationships. This study responds to nonprofits' interest in understanding beneficial fundraising strategies and to the lack of empirical literature with the question: From the donor perspective, what characteristics do fundraisers demonstrate within high-quality major giving relationships? This exploratory, interview-based project used a codebook thematic analysis approach based on HEXACO personality theory to review participants' reflections about fundraisers. The 20 participating donors had given between USD$10,000 and USD$40 million to select colleges and universities in the US Midwest region. This study confirms much of what fundraisers believe to be important to major gift donors, with added nuance about the complex form of professionalism donors appreciate. The fundraiser characteristics show several dual emphases, including on field expertise *and* interpersonal acumen, attention to donor concerns *and* institutional interests, patience with the gift-making process *and* ability to facilitate its progression, and attention to ethical practice *and* empathetic interactions. The study shows the inner workings of the major giving relationship fundraising paradigm, reveals how societal perceptions of fundraisers are relevant for understanding donor preferences, and provides a framework for fundraisers to assess and enhance their interactions with major donors.

KEYWORDS
fundraising, fundraising relationships, higher education giving, major gift fundraising

Practitioner Points

What is already known about this topic

- There is ample research about donor motivations.
- There is research about what fundraisers believe is required to be successful in the field.
- The "relationship fundraising" paradigm guides much fundraising practice at the major gift level in the US.

What this paper adds

- This paper provides research about the major donor/fundraiser relationship.
- It provides new information from major donors' point of view.
- It includes a new structure for delineating fundraiser characteristics and behaviors within the relational context.
- HEXACO personality theory is used as a framework and codebook.

The implications of study findings for practioners

- It provides information about what donors see as positive characteristics in fundraising relationships, while also acknowledging the fundraisers' assessments of successful relationships.
- It shows donors' responsiveness to interpersonal practices based on the "relationship fundraising" paradigm as well as their respect for fundraiser expertise and ethical responsibility.
- It provides new information to inform fundraisers' analysis of their interactions with donors.

1 | INTRODUCTION

The public—across various cultural and national contexts—is often uninformed or misinformed about fundraising's purposes, methods, processes, standards, and philosophies (Breeze, 2017; Breeze & Scaife, 2015; Shaker et al., 2019). In the US, fundraisers are sometimes valorized for providing an important service for social needs and sometimes plagued by stigma stemming from conceptions that fundraising is "dirty work" tainted by its association with money (Meisenbach et al., 2019). Philanthropic dollars are a key financial input for nonprofits, accounting for approximately 20% of the US sector's organizational revenue (Pratt & Aanestad, 2020). In higher education, philanthropic dollars account for an average of 10% of college and university budgets (Seltzer, 2018). An overwhelming proportion of gifts follow a solicitation of some kind (Bryant et al., 2003; Yörük, 2012), and, according to international research, solicitation is a key mechanism that drives donor giving (Bekkers & Wiepking, 2011). Fundraisers seek charitable gifts of various sizes from donors (individuals and organizations) to fund nonprofit organizations and their missions. Kelly (1998) framed fundraising as organizational relationship building with constituents with shared interests and goals.

Some fundraisers focus on "major gifts," engaging with individual donors to garner donations at a financial level deemed organizationally significant (Hodge & Bout, 2022). The dominant paradigm for raising these gifts is "relationship fundraising," derived from "relationship marketing," which asserts that the best outcomes result from personalized fundraising strategies based on donors' unique preferences and needs (Breeze, 2017; Burnett, 2002; Kelly, 1998; MacQuillin & Sargeant, 2016). In the UK, this approach originated as a strategy for broad-based fundraising communications. In the US, relationship fundraising is prominent in major giving, whereby fundraisers learn about donors within the context of interpersonal relationships. The upward trajectory of philanthropic giving in the US (including within higher education) and increasing organizational emphasis on major gift fundraising indicate the strategy's effectiveness and feasibility (Council for Advancement and Support of Education, 2022; Giving USA Foundation, 2022).

Despite relationship fundraising's dominance and success, there is little research to help nonprofits understand the paradigm's fundamental components for major giving (Shaker & Nelson, 2022). Indeed, although ample attention is accorded to donors and their motivations, minimal attention is given to fundraisers and their interface with donors (Bekkers & Wiepking, 2011; Chapman et al., 2022). There is some new academic literature about fundraisers' experiences, behaviors, and views on fundraising published in the last decade (i.e., Alborough, 2019; Breeze, 2017; Breeze & Jollymore, 2017; Meisenbach et al., 2019; Nyman et al., 2018; Shaker et al., 2019; Shaker & Nathan, 2017). These studies provide crucial insights from the fundraisers' perspective but lack donors' points of view. The number of qualitative studies featuring major donors—particularly "elite" donors—is exceedingly small (Breeze, 2021). The studies typically examine the donors' overall philanthropic motivations and behaviors, providing only limited (if any) attention to donor and fundraiser interactions. In a systematic literature review of giving studies (1980–2020), Chapman et al. (2022) assert the need for more research on the "neglected fundraiser" and the fundraiser-donor dyad. They provide a strategy for examining giving, arguing in "charitable triad theory" that donors, fundraisers, beneficiaries, and their relationships all require attention. Of the approximately 1169 studies in the review, less than 7% (83) focused on either the fundraiser or the fundraiser-donor relationship.

This study responds to the need to study fundraising more holistically, including by researching the neglected fundraiser, while reflecting nonprofits' practical interest in fruitful major donor relationships. It considers fundraisers within the context of their relationships with donors. It features major donors' perceptions of fundraisers, a rarity in fundraising research; the specific fundraisers of interest worked with the donors to complete a significant gift, also a novel research criterion. The research question was: From the donor perspective, what characteristics do fundraisers demonstrate within high-quality major giving relationships? The study took place within the US higher education context, known for its success in garnering major gifts and recipient of a notable proportion of philanthropic dollars in the US (Giving USA Foundation, 2022). Twenty alumni donors, with gifts from USD$10,000–USD$40 million to 14 Midwest colleges and universities participated in this exploratory, interview-based study. HEXACO personality theory served as the basis of the study's codebook thematic analysis and is a strategy for examining personality differences using everyday language (Lee & Ashton, 2009); it facilitated a comprehensive examination of the donors' views of the fundraisers.

The analysis identified a set of fundraiser characteristics (comprised of both traits and behaviors) that were foundational for fundraising relationships (from the donors' perspectives), showing the relationship fundraising paradigm's effectiveness and empirically illuminating these donors' responses to fundraisers. The donors identified the fundraisers as *technical virtuosos* who were highly proficient in fundraising mechanics, *even-handed representatives* who attended to donor and organization alike, *dedicated collaborators* who worked patiently with donors to craft gifts, *altruistic supporters* who were sincerely interested in donors, *sociable communicators* who were adept at facilitating positive interactions, and *honorable citizens* with sound ethical compasses and personal integrity. These characteristics verify fundraisers' own beliefs about donor preferences, while spotlighting the complexity of donors' definitions of professional behavior within the highly personal context of major gift fundraising. The findings also underscore the role of ethics and empathy and show a linkage to the broader social commentary about the field. Considering the highly established nature of major gift fundraising in higher education and the alumni participants' established organizational loyalty, this suggests that empathy and ethics may be even more critical in other contexts with other types of donors. The study provides fundraisers and fundraising leaders with evidence to use in strategy, mentoring, and professional development. As proposed by charitable triad theory and research noting that the nature of the solicitation matters, this study gives evidence as to why fundraisers cannot be ignored when seeking to understand major giving (Bekkers & Wiepking, 2011; Chapman et al., 2022).

1.1 | Fundraisers in context

Data from the US Bureau of Labor Statistics indicates that there are 190,000 fundraisers/fundraisers and public relations managers and that the field is growing (Bureau of Labor Statistics, 2020a; 2020b). No other country has nearly this number of fundraisers, and worldwide demand for professional fundraisers is rising (Breeze & Scaife, 2015). Higher education institutions globally are increasingly interested in philanthropy and fundraising (Drezner, 2019). According to US data the field is predominantly female (69%, with 9% not responding) and white (86%), and higher education shares similar demographics (Association of Fundraising Professionals [AFP], 2021; CASE Research, 2017). Gender and racial disparities exist in salary, position level, and lived experience (LePere-Schloop & Beaton, 2022; Mesch & Rooney, 2008). Large gifts, and fundraisers adept at raising them, are critically important to US nonprofits due in part to declines in small and medium-sized gifts (Buteau, et al., 2019; Rooney, 2019). Large gifts are also sought after globally in contexts where philanthropic giving is less robust and fundraising is developing (Breeze & Scaife, 2015). In the US, colleges and universities are known for raising large gifts—analysis has shown that more gifts of at least USD$1 million support higher education than any other organizational form (Osili & Ackerman, 2013).

Fundraising is a "hidden" occupation. Fundraisers often "fall into" the field after trying other careers, usually with limited training and without associated formal education (AFP, 2021; Breeze, 2017; Nathan & Tempel, 2017). Fundraising has professionalized as it has moved from being temporary or volunteer work to being the purview of paid, permanent staff with professional associations, standards of ethics, and academic courses (Breeze, 2017; Shaker et al., 2019). Whether the field has the trappings and legitimacy of a "profession" remains discussed and unresolved—a condition that has relevance to how fundraisers do their work that may relate to how donors perceive them (Breeze, 2017; Shaker et al., 2019). Indeed, by some measures, the professional designation is directly related to the public's view of a field's legitimacy (MacQuillin, 2017). Fundraisers themselves feel positive about the field but believe that the public sees fundraising ambivalently or negatively (Meisenbach et al., 2019; Shaker & Nathan, 2017). Fundraisers must navigate stigma about the nature of their work, and about the type of people who would make a living by asking others for money (Meisenbach, et al., 2019).

2 | LITERATURE REVIEW AND THEORY

Charitable giving is influenced by a collective of donors' individual demographics and experiences (micro-level), their experiences with the nonprofits (meso-level), and broad social circumstances in which gifts are made (macro-level) (Barman, 2017). Donors' perceptions of fundraisers must therefore be considered in a complex context of their own individual circumstances (which are well studied in the literature), organizational settings and fundraising paradigms, and societal perceptions of philanthropy and fundraising (discussed in the prior section). Thus, this section focuses on the meso-level topic of relationship fundraising and its ethical ramifications as well as research on fundraiser traits and behaviors. It ends with information about HEXACO personality theory as an avenue for examining meso-level interactions in practice.

2.1 | Relationship fundraising and ethics

"Relationship fundraising," first popularized in the 1990s, presents donors as individuals with specific interests to be considered alongside organizational needs in fundraising and communications processes (Burnett, 2002). Scholar Kelly (1991, 1998) described fundraising as a public relations activity centering on communication and relationship building. Expert practitioner Penelope Burke (2008) popularized the term "donor centered fundraising," which prioritizes donors' needs for meaningful information achieved in part through opportunities for designated giving and regular impact reporting. All told, this fundraising approach has been utilized with donors of all financial levels, with great variation in what a "relationship" constitutes. Research on relationship fundraising has focused on lower-level donors, giving loyalty, and other outcomes, not on major givers (i.e., Sargeant, 2001; Sargeant & Shang, 2010; Waters, 2008). Fundraising industry experts differentiate the transactional (organizationally driven) annual gift from the relational/transformational (organizationally- and donor-driven) major gift approach

TABLE 1 Key traits, skills, and knowledge of fundraisers based on surveys of fundraisers.

Date, authorship, country, participants	Key traits	Key skills	Key knowledge
1997, Duronio & Tempel, US, Fundraisers	Commitment to the cause/ organization Authenticity and warmth Honesty and integrity Hard working	Communication Management and organization Fundraising	Fundraising domains Organizational capacity Leadership Academic training
2014, Nagaraj, US, Canada, UK, Higher education major gift fundraisers	Behavioral and linguistic flexibility Intellectual and social curiosity	Information distillation Strategic solicitation	
2017, Breeze, UK, Fundraisers and "million-pound asker" fundraisers	As compared to the public, fundraisers are more: Trusting Extraverted, open, conscientious, agreeable, and neurotic Emotionally intelligent Sociable and likely to organize social gatherings	Fostering a philanthropic culture Framing needs Facilitating donations	
2017, Shaker & Nathan, US, Higher education fundraisers	Emotionally intelligent (including interpersonal communication skills) Achievement oriented Ethically grounded Other centered Mission focused Intellectually adept	Oral/written communication Interpersonal communication Listening Donor engagement	Managing the fundraising process Fundraising programs and strategies Maintaining a professional outlook Communicating effectively

Source: Expanded from Shaker & Nathan, 2022.

(Hodge, 2016). They see differences in formative, normative, and integrative fundraising development programs (Fogal, 2010), but do not base these assertions on empirical data. At the major gift level fundraisers become organizations' "relational" agents, ideally navigating the space between donor and organization with transformational effects for both parties.

Fundraising relationships, like all relationships, include power dynamics (Inesi et al., 2012; LePere-Schloop & Beaton, 2022). Fundraising experts and associations provide guidance on how fundraisers should behave with donors. Fundraising relationships are built on trust, are owned by organizations, and must be purposeful in maintaining their philanthropic aims (Tempel, 2016). AFP Code of Ethical Standards (1964, amended 2014) says that fundraisers, shall, "Demonstrate concern for the interests and well-being of individuals affected by their actions, "and shall "not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations." The AFP and associated' organizations' "Donor Bill of Rights" (1993) also states that donors should be able "To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature." These statements demarcate ethical expectations appropriate for donors regarding fundraisers, while having implications for relationship fundraising. Critics of relationship and donor centered fundraising have expressed concern that prioritizing donors' needs and experiences can go too far, putting too much power in hands of donors, de-emphasizing organizational needs and beneficiary voices, slowing gift-making processes, and fostering inappropriate expectations among donors in relation to fundraisers (Le, 2017; Walker, 2020). Defenders of the approach note its record of success and many positive dimensions. They say it bears improving, not dismantling (MacQuillin, 2020), and requires that ethical codes' also attend to organizational and fundraiser rights (MacQuillin & Sargeant, 2019).

2.2 | Fundraisers' traits and behaviors

Fundraising practitioners and researchers have sought to demarcate the traits of successful fundraisers for at least 35 years (i.e., Panas, 1988: traits were impeccable integrity, good listening skills, ability to motivate, hard worker, concern for people). Table 1 summarizes the findings of several US, UK, and Canada-based studies about fundraisers, which are discussed next. Duronio and Tempel (1997) asked US fundraisers about traits, skills, and knowledge of "the most successful fundraiser you know," a question later repeated to higher education fundraisers by Shaker and Nathan (2017). In both studies the fundraisers emphasized communication and interpersonal skills, integrity, and cause commitment. Nagaraj's (2014) well-known industry study of "gifted and talented" US and Canadian higher education fundraisers determined that the most successful fundraisers were "curious chameleons" with strengths in behavioral and linguistic flexibility, strategic solicitation, intellectual and social curiosity, and information distillation. Breeze's (2017) British "million-pound asker" fundraisers were trusting, highly sociable, and emotionally intelligent, the last also was present in the Shaker & Nathan (2017) study. All the studies relied on fundraisers' intuition and experiences and did not include donor insights; only Breeze's (2017) applied theory. The success of contemporary major gift fundraising approaches intimates alignment between fundraisers' perceptions and donors' views, as explored in this study.

TABLE 2 HEXACO-Personality Inventory-Revised domains, facets, adjectives, and brief explanations.

Domain and facets	Common defining adjectives and brief explanation
Honesty-humility	Sincere, honest, faithful/loyal, modest/unassuming, fair-minded versus sly, greedy, pretentious, hypocritical, boastful, pompous
Sincerity Fairness Greed-avoidance Modesty	*Tendency to be fair and genuine in dealing with others, in the sense of cooperating with others even when one exploit them without suffering retailiation*
Emotionality	Emotional, oversensitive, sentimental, fearful, anxious, vulnerable versus brave, tough, independent, self-assured, stable
Fearfulness Anxiety Dependence Sentimentality	*Tendencies in relation to empathic concern and emotional attachment toward close others, including harm-avoidant and help-seeking behaviors*
eXtraversion	Outgoing, lively, extraverted, sociable, talkative, cheerful, active versus shy, passive, withdrawn, introverted, quiet, reserved
Expressiveness Social Boldness Sociability Liveliness	*Tendencies in relation to social endeavors such as socializing, leading, or entertaining*
Agreeableness	Patient, tolerant, peaceful, mild, agreeable, lenient, gentle versus ill-tempered, quarrelsome, stubborn, choleric
Forgiveness Gentleness Flexibility Patience	*Tendency to be forgiving and tolerant of others, in the sense of cooperating with others even when one might suffer exploitation by them*
Conscientiousness	Organized, disciplined, diligent, careful, thorough, precise versus sloppy, negligent, reckless, lazy, irresponsible, absent-minded
Organization Diligence Perfectionism Prudence	*Tendencies in relation to task-related endeavors such as working, planning, organizing*
Openness to Experience	Intellectual, creative, unconventional, innovative, ironic versus shallow, unimaginative, conventional
Esthetic Appreciation Inquisitiveness Creativity Unconventionality	*Tendencies in relation to idea-related endeavors such as learning, imagining, thinking*
Interstitial facet scale domain	
Altruism (vs. Antagonism)	Sympathy, soft-heartedness, generosity = associated with Honest-Humility, Agreeableness, Emotionality *Tendency to be sympathetic and softhearted toward others*

Source: Ashton & Lee, 2007; Lee & Ashton, 2009.

Researchers have examined fundraisers' behaviors and roles in facilitating large-scale gifts as a way of understanding fundraising and exploring antecedents of fundraising success. In a study of UK fundraisers, Alborough (2019) found that donors held their primary relationships with fundraisers (rather than other organizational staff or beneficiaries) who mediated and managed the (reciprocal) gift exchange in which the wealthiest donors were prioritized. UK and Canadian fundraisers ($N = 73$) identified relationship development as a key role of fundraisers and behaviors that facilitated trust as a critical dimension of well-received solicitations for support (Breeze & Jollymore, 2017). Relationships based on trust required fundraisers to be authentic, empathetic, interested in people, and open to sharing themselves. As "honest brokers" the fundraisers represented donor and organizational interests alike, and this required belief in the cause, as well as the ability to find common ground to "reframe" the gift at that intersection. The "reframer" is not unlike the "negotiator," identified by Canadian higher education fundraisers of transformational gifts (greater than $5 million) ($N = 16$), who identify each donor's interests through formation of a "trusted relationship" before seeking alignment within the institution (Nyman et al., 2018). These studies suggest that the fundraisers must be intellectually and socially sophisticated in order to meet donors' high expectations for both personal satisfaction and organizational impact.

No research is available to compare these assessments with donors' observations of fundraisers. Gaining access to elite donors can require a high level of social trust and developing rapport can be difficult even if access is granted (Breeze, 2021; Moyser & Wagstaffe, 1987; Noy, 2008). Research about wealthy donors often takes the form of social commentary, surveys, and/or discussions with their intermediaries (Breeze, 2021). In cases where donors are interviewed and interact directly with researchers, studies examine the larger context of their philanthropic motivations, priorities, journeys, and behaviors (i.e., Breeze & Lloyd, 2013; Dale & O'Connor, 2021) not their relationships with fundraisers. Research by Breeze & Lloyd (2013) did note that, for some donors, relationships with nonprofit staff could be a giving motivator. Some dissertation-based studies featuring higher education donors also mention the presence of positive relationships with competent and trusted fundraisers in the giving process, but without significant examination (i.e., Cascione, 2004; Morrison, 2015), leaving many questions about behaviors within relationships.

2.3 | HEXACO personality theory

One method for analyzing people's behaviors and relationships within society is through examination of personality. A dominant paradigm in personality psychology for more than a century originates from the "lexical hypothesis," based on the premise that the most salient individual personality differences can be described in everyday language (Uher, 2013). Lexical studies of personality use common words to represent the full spectrum of personality. The studies presume that these assessments (and determining the "lexicon of personality") can be effectively made through individuals' assessments of themselves and others. The discovery of five major dimensions of personality (Openness to Experience; Extraversion;

Conscientiousness, Neuroticism, Agreeableness) validated as the Big 5 Personality Test in the 1970s and 1980s is considered a milestone of modern psychology (Uher, 2013).

After concluding that the Big 5 Inventory did not reflect all dimensions of human personality, Lee & Ashton (2006) developed the HEXACO Personality Inventory. Like the Big 5, it is a personality test and a theory of personality that defines people's most prominent personality traits but it is based on six domains. Three of the domains are like those in the Big 5 structure (eXtraversion/Extraversion, Conscientiousness, Openness to Experience), two others differ more significantly (Emotionality, Agreeableness (versus Anger)), and the sixth, Honesty-Humility was entirely new (Ashton & Lee, 2020).[i] Each HEXACO domain also contains four facets that assess specific dimensions (i.e., facets of Honesty-Humility are sincerity, fairness, greed-avoidance, modesty), which allow for nuanced examination (Lee & Ashton, 2009). There is also one interstitial domain scale, Altruism (versus Antagonism), which blends traits from Honesty-Humility, Agreeableness, and Emotionality (Lee & Ashton, 2006) and assesses sympathy and softheartedness. Table 2 provides information about each domain and its facets. The questionnaire instrument, now named HEXACO-Personality Inventory-Revised (HEXACO-PI-R) in its updated form (Lee & Ashton, 2009), has been used in thousands of quantitative studies to address questions of personality around the world (e.g., meta-analyses by Lee et al., 2019; Pletzer et al., 2019; Thielmann et al., 2020; Zettler et al., 2020). In this study, the HEXACO was the theoretical framework to orient and guide a codebook thematic analysis of fundraiser personality and behavior. This is an innovative and exploratory effort to bring personality psychology to a largely a-theoretical space. Because the HEXACO encompasses the full range of personality, it provided a holistic tool for this examination of donors' perceptions about fundraisers.

HEXACO has been used in quantitative studies of philanthropic people, but not fundraisers or nonprofit employees. For example, the Honesty-Humility domain has been found to predict prosocial behavior (Anglim & O'Connor, 2019; Fang et al., 2019; Lee & Ashton, 2013; Zhao & Smillie, 2015). One study found that all six HEXACO domains were related to attitudes toward nonprofit advertisements while only eXtraversion, Conscientiousness, and Openness to Experience were significant in intent to donate (Lim et al., 2021). Big 5 personality studies have also sought to understand volunteers, activists, and citizenship in relation to the Extraversion, Agreeableness, and Conscientiousness domains (Omoto et al., 2010). Breeze's (2017) fundraiser study included the Big 5 personality inventory and found fundraisers' scores were higher than the UK public for Extraversion, Openness, Conscientiousness, and Agreeableness. Fundraisers also tended to score higher on Neuroticism.

In the business literature, job productivity and personality are well-studied (see meta-analyses by Barrick & Mount, 1991; He et al., 2019; Tett et al., 1999). For example, one study determined that individual, non-team-based sales productivity was positively associated with high scores on the Big 5 Conscientiousness domain (and specifically the facet of Achievement) and negatively correlated with high scores for Agreeableness. It is not uncommon that low Agreeableness correlates with better objective sales job performance, especially in cases where income is commission-based (Aziz et al., 2002; Crant, 1995). The situational conditions, or characteristics of the work, are relevant (i.e., How is work evaluated? What level of discretion do employees have in completing the work? How long is a person's relationship with clients or customers?) (Penney et al., 2011). Fundraising is driven by a mission orientation rather than a for-profit model; thus, one would expect differences in how personality traits are manifest between fundraisers and salespeople but anticipate that situational factors would be relevant in both cases. To understand how personality relates to job performance, Penney et al. (2011) recommended studying inputs (employee behaviors and efforts), rather than outcomes (effects of the behaviors and efforts) because employee inputs are within their own control while outcomes are not.

3 | METHODS

This paper seeks to expand knowledge of the charitable triad, which includes the interface among donors, fundraisers, and beneficiaries (Chapman et al., 2022). This section provides information on the participating donors (and the fundraisers they discuss), study procedures, and analysis of the interview data.

3.1 | Participants

The participants in this study were 19 alumni donors and one alumni donor couple ($N = 20$) to 14 4-year colleges and universities across 7 states in the US Midwest. The study included public doctoral universities (8) and private master's colleges and baccalaureate colleges (6), a sample chosen for researcher proximity and as a subset of more typical rather than more elite institutions. Donors' gifts spanned a broad array of purposes from athletics and student scholarships to programmatic and faculty support, with some being smaller major gifts (USD $10,000) and others being very large (USD$40 million). Just over one-half of the donors identified as female and all as white. The mean donor age was 71 and the median was 75 (range: 42–93). Because a single donor-fundraiser relationship was the core source of information for the study, information about fundraiser demographics is relevant. Fundraisers were younger than the donors (mean 43 years, median 41; range: 24–72). Most of the fundraisers identified as male (60%) and white (85%) and ranged from very experienced (35 years) to inexperienced (less than 5 years), with a mean of 16 years in the field. The length of the relationships varied greatly (1–35 years) with a mean of 8 years and median of 5 years.

3.2 | Procedures

For this IRB-approved study, higher education fundraisers were asked to nominate a major donor to participate. Fundraisers were expected to nominate donors with whom they had secure and positive

TABLE 3 Fundraiser characteristics, characteristic summaries, and HEXACO associations.

Fundraiser characteristic	Characteristic summary	HEXACO domain and facet associations
Technical virtuoso	Navigates the intricacies of gift raising and giving with ease	Conscientiousness (Organization, Diligence, Perfectionism, Prudence), eXtraversion (Social Boldness, Liveliness)
Even-handed representative	Provides fair-minded attention to donor and institutional interests	Honesty-Humility (Sincerity, Fairness, Greed-Avoidance), Agreeableness (Gentleness), Altruism (vs Antagonism)
Dedicated collaborator	Facilitates the gift creation process with patience	Agreeableness (Flexibility, Gentleness, Patience), Conscientiousness (Diligence), Openness to Experience (Inquisitiveness, Creativity)
Altruistic supporter	Demonstrates genuine care and interest in donors as whole people	Emotionality (Sentimentality), eXtraversion (Sociability), Honestly-Humility (Sincerity), Altruism (vs Antagonism)
Sociable communicator	Interacts with positivity and emotional intelligence	eXtraversion (Expressiveness, Social Boldness, Sociability, Liveliness), Openness to Experience (Inquisitiveness), Agreeableness (Flexibility)
Honorable citizen	Demonstrates high ethical standards in work and life	Honesty-Humility (Sincerity, Fairness, Greed-Avoidance), Agreeableness (Forgiveness, Flexibility)

relationships. Thus, while this analysis foregrounds the perceptions of the donors, the sampling strategy recognized fundraisers' preferences and facilitated study of quality relationships from their experience. Although not stipulated as a nomination criterion, all donors were institutional alumni. The fundraisers were asked to use their institutional standards in identifying the major donor financial threshold.

Seeking donors' involvement in a research study is unusual (Breeze, 2021). It requires a high trust level because a negative interview experience for a donor could harm the fundraising relationship. Thus, snowball sampling that relied on known contacts their referrals was the logical choice for gaining access to the donors (Moyser & Wagstaffe, 1987; Noy, 2008). Snowball sampling is common in social science studies, although it can lead to selection bias (Golafshani, 2003).

The interviews used a semi-structured approach with open-ended questions and follow-up prompts meant to elicit descriptive reflections (Kvale, 2012). Copies of the pre-interview questionnaire, which collected demographic information, and interview protocol are available from https://tinyurl.com/DonorPerceptions2. Survey questions addressed the relationship between the donor and nominating fundraiser, with opportunities for donors to comment on other fundraising relationships. This strategy garnered information on the fundraisers' traits and behaviors organically and within the larger context.

Interviews lasted between 35 and 116 min (mean 64 min) and took place between September 2018 and December 2019. They were audio-recorded, professionally transcribed, reviewed, and de-identified to protect confidentiality before being added into DeDoose, a low-cost cloud-based software for qualitative and mixed method analysis that facilitates coding, theme development, and memo-writing.

3.3 | Analysis

Thematic analysis allows researchers to identify patterns of meaning in relation to a topic and research question(s) by seeking commonalities across a data set (Braun & Clarke, 2012). It is a flexible approach that takes many forms and can be used to identify obvious or more latent assumptions and ideas. This study used a codebook based on HEXACO personality theory and took a constructionist perspective examining the donors' sentiments about fundraisers in the context of broader perceptions of the field. It followed a systematic process developed by Braun and Clarke (2012) named codebook thematic analysis, which combines a "structured approach to coding through the use of a codebook or coding frame, (some) early theme development, a typical conceptualization of themes as topic summaries… [and consideration of] researcher subjectivity as a resource for research" (Braun & Clarke, 2022, p. 6). The strategy of balancing the researcher's expertise (in fundraising) with a structured coding frame (i.e., HEXACO personality theory, see Table 2) works well for applied research (Braun & Clarke, 2022). This approach provided a formalized framework drawn from broader psychological understandings of human personality and behavior.

After a careful review of the interviews, the researcher coded chunks of the narrative to the HEXACO domains. When narrative chunks encompassed multiple HEXACO domains, multiple codes were applied to maintain the context of each statement. Subsequent inductive coding allowed for the emergence of relevant ideas outside of the HEXACO framework related to fundraising literature. The codebook approach helped to ensure trustworthiness of the analysis as did memo writing, peer debriefing, thick description, notetaking, and explaining theoretical and methodological choices (Nowell et al., 2017). The memos kept during coding provided the starting point for constructing and synthesizing themes into an overall narrative of the donors' perceptions of the fundraisers. The preliminary

themes were then reviewed against the coding and raw data for quality and coherence. After further refinement, draf narratives for each theme were constructed and presented to peers for comment and debriefing before finalization.

4 | FINDINGS

The study themes are reported in this section as fundraiser characteristics—a combination of personality traits and their enactment as behaviors toward the donors. This presents a holistic view, summarized in Table 3, of the optimal modes of fundraisers' relational interactions—according to this sample of donors.

4.1 | Technical virtuoso

Model fundraisers are experts in the logistics of fundraising. They understand how to talk about philanthropic giving and articulate rationales for giving in a compelling way. They are direct, explaining the "why" of the gift, explaining what it will achieve, and making a clear request for support. They are comfortable talking about and asking for money. They are skilled in explaining the "how" of the gift and presenting well-reasoned options for structuring the finances. They are prepared for conversations and meetings, excel at follow-up, keep their commitments, stay in touch, attend to details, and know where their expertise ends and others' input is needed. One donor recalled, "[The institution] had a standard 'Hey you could contribute to this scholarship fund.' It was more than what I really wanted to [contribute] but he said, 'Well hey if you want to do something special, we'll figure that out.' So he worked with me to make that happen and it was an annual contribution of over 5 years to fund it. I think because of his follow-up, I just became more committed to it" (Donor 14). These fundraisers know how to remain philanthropically purposeful in their conversations and take care to bring ease and confidence to the giving process. They educate as well as inform about the purposes gifts will serve and about gift-making methods and structures, acting as philanthropic guides and coaches. They know the structures and systems by which gifts are bound. They are confident, not "clumsy," because their actions appear grounded in expertise and experience. This combination of knowledge and skill builds donors' trust, eases their concerns, and inspires their giving.

4.2 | Even-handed representative

Fundraisers are attentive to institutional and donor needs. Their institutional knowledge is strong, enabling their understanding of the importance of philanthropic gifts and the gifts' potential outcomes. They articulate institutional priorities and represent institutional interests to donors. They are committed to facilitating gifts that do not disadvantage the university. They also recognize institutional limitations and challenges and are diplomatic and careful when addressing donors' associated concerns. One donor recalled, "He knew that I was frustrated with the last meetings of this committee… He would never say 'Oh yeah, you're right.' He would just say, "Yeah, we can change things up a bit and… let's find the answer, let's not grouse over what the problem is.' I mean, that's a better way to look at things" (Donor 20). Another donor recalled the fundraiser intervening with others at the university to create a more unified philanthropic solicitation strategy. These fundraisers seek the best outcomes for institutions and donors, negotiating on behalf of one party with the other as needed. Through the fundraisers donors see "the other side of the coin" and know the institutional perspective. The fundraisers also discover the donors' views and philanthropic goals; their interest in the donors is not proforma. They are fair-minded advocates for the donors and the donors do not feel as though their money is all that matters. Donors were adamant that the best fundraisers do not use pressure or push them to give. They said "high pressure" strategies are unappealing, and they do not appreciate being "steamrolled" or "cornered" into giving. Instead, the donors prefered persistence informed by consideration of their interests and circumstances. One donor reflected this way, "He explained to me different options and really talked about what was going on and what needed funding and how different funding mechanisms can work. If you give this much you can do this… He acknowledged what my limits were, and I don't feel like he tried to push me beyond my limits in any way. But once we established what my limits were, it was like 'Okay, how can we direct it in a way that is more meaningful to you?" (Donor 18). The fundraisers navigated institutional processes and developed gift structures that made sense to the donors. The fundraisers were communications conduits, taking the necessary steps to assure that the integration of new gifts into university systems and stewarded afterward.

4.3 | Dedicated collaborator

The fundraisers are good listeners who take time to understand donors' intent and to engage in dialog and co-creation. They show openness and interest in donors' ideas and aim to translate their priorities and preferences into well-articulated and impactful gifts. Some donors entered the process with a clarity of purpose that fundraisers then helped them to accomplish, but most did not. Fundraisers often propose ideas. They coordinate with donors to develop gifts from concept to realization. One donor talked about the fundraiser's questions and process like this: "'What if it wasn't a one-time thing, what if it was endowed? What if it was this? What if it was this?' And, it was this whole new world of options. I'm like 'Okay I don't know what any of this stuff is. Let's talk?' And so, we worked through it and finally came up with: Here's going to be the amount. Here's how we're going to set it up" (Donor 11). The fundraisers are realistic but flexible thinkers, are invested in creating successful gifts, exhibit a sense of shared ownership, and thrive within a collaborative environment. They are craftspeople who take joy in journeying with donors toward the "right" gift and ultimately in discovering the final gift designation.

Some donors noted that they can "be a lot" and require "patience and tolerance" because of their specific interests, lack of experience, or slow decision-making process. They appreciate fundraisers who are willing to engage in a "back and forth" to sort through details and sticking points. Being flexible and having sound listening skills was a strength that allowed fundraisers and donors to see where "we wanted to go next." Often fundraisers and donors made the gifts happen together by working through options and amounts to discern what was feasible, appropriate, and impactful—it was best when there was a "meeting of the minds," according to one donor, where no one was intimidated. One donor noted that his recent gift would have had better outcomes if it had proceeded with more input from the fundraiser. These collaborative fundraisers are open-minded to new ideas, not stuck in old approaches to philanthropy or stereotypes about donors.

4.4 | Altruistic supporter

The fundraisers demonstrate genuine care for the donors and others around them. They are authentically interested in the donors' lives and inquisitive, asking questions and remembering the details. The fundraisers show concern in times of hardship and want to help. One donor said, "She just is a good listener and I guess she recognized that I was in a bad, bad place, a low place, in a low place. I think I can say honestly that she helped lift me out of that. (Donor 1)" They remember and recognize celebratory moments. The donors believed that the fundraisers liked and valued them as people. The donors felt welcomed and respected, noting that the fundraisers' attention was formed by a sincere interpersonal interest. Donors recognized these interactions as dimensions of the fundraisers' jobs but noted the authenticity of the interpersonal interest. One donor appreciated that fundraisers were "building a relationship with an individual and, while you know that there's probably an ask coming, they're not building it just for the sake of the ask… You feel like it's more than just being sold" (Donor 18). A donor said he would be "amazed if the relationship ended when the gift was finalized." Another reported that the fundraiser "went above and beyond" because he truly cared about people. Donors also noticed when fundraisers were compassionate and kind to others (and not just big donors) in their presence. The fundraisers' sensitivity allowed them to recognize donors' emotional connections to the institution (and its people), "heart" for the cause, worries and joys, and to demonstrate their understanding, not only in gift conversations but throughout many interactions.

4.5 | Sociable communicator

The fundraisers are positive people whose enthusiasm for the work shines through in their communications, which are characterized by warmth and expressiveness. The fundraisers are neither "cold" and removed nor fawning and fake. They are natural, comfortable, and at ease with the donors. Fundraisers are the kind of people who make others feel valued. A donor reported on the opposite experience with a fundraiser, "Before I gave a major gift to [the university], I was called by somebody from the school and he took me to lunch. I can't explain it, it was like I knew he was waiting to ask me for money, and he did it. I just didn't like him, and I told somebody not to send him back to me… I knew he was just waiting to ask me for money, and he did it in such a sort of cold way" (Donor 7). In positive scenarios, fundraisers facilitate smooth and satisfying conversations and are friendly and likable.

It is not "drudgery" to spend time together but rather "a joy"—and the donors believed it to be the same for the fundraisers. The fundraisers are not overbearing or dominating but instead project an openness that encourages donors to share their thoughts, ideas, and emotions. The fundraisers are generous in giving their full attention to their conversational partners—intentionally visiting with donors at events and showing a welcoming persona in social settings. They are experts at drawing out quieter donors and putting them at ease. They can "read the room" and understand how different donors prefer to interact and engage. For example, one donor said, "He's a natural and very outgoing, very extroverted, but not in an overbearing way, which to me worked really well 'cause I'm actually rather introverted" (Donor 15). Some of the donors liked "light and chatty" interactions while others preferred conversations of meaning, depth, and intellectual interest. For example, one donor said, "The secret to getting a better relationship with me is bringing the level of conversation to a higher level. It wasn't even being chatty… It was really more about the dynamics around the organization… I think it was just smarter on her part to try to engage me in a way that made me think more about the organization as opposed to a conversation that might be much shallower" (Donor 21).

4.6 | Honorable citizen

The donors could tell when fundraisers had strong character and were ethical in their work. Donors noted, "He is a man of integrity" (Donor 18), "He is the most self-effacing guy you can imagine" (Donor 10), and "She could have had a higher salary [elsewhere] but took this job instead. There are various ways in which her values determine [her decisions]" (Donor 1). The fundraisers are admirable people who can be relied upon to do the right thing, not only on the job but in life generally. They demonstrate their values in ways the donors could identify with. One donor connected with a fundraiser over several shared values: "We're both very family oriented, I think. I think that she's honest… We're both professionals in different ways… This makes me feel comfortable with working with her" (Donor 12).

The fundraisers are trustworthy and honest and "didn't pull any punches," "sell a bill of goods," or try to mislead their donors. The fundraisers are "real people" and not "slick operators" doing the work just for the paycheck. The donors believed the fundraisers to be motivated less by financial returns and more by what the gifts could achieve if conceived and shaped to reach their full potential. The fundraisers are personally committed to the institution and its mission, and the donors know it. "I know how he feels about [the college]. I know he wakes up and pinches himself every morning that he gets to go to [work on campus]" (Donor 3). They saw the fundraisers as

hopeful realists who see their institutions' opportunities while also recognizing challenging realities. If there are problems or issues with a gift, the fundraisers follow an ethical standard, beyond merely "towing the party line" for its own sake. They are honest with themselves and able to be reflective about mistakes and areas of improvement.

5 | DISCUSSION AND IMPLICATIONS FOR SCHOLARSHIP AND PRACTICE

This project explored donors' perceptions of fundraisers within high-quality major gift relationships in US higher education. It used the HEXACO personality inventory for a codebook thematic analysis, generating a set of positive characteristics based on fundraisers' traits *and* behaviors, conveying the donor experience within the fundraising relationship. This study illustrates the relationship fundraising paradigm, provides insights into donor preferences in the broader context, and generates ideas for fundraisers to develop and refine major gift fundraising approaches.

5.1 | Theoretical and paradigmatic contributions

This study illuminated an underexamined facet of the charitabletTriad, specifically the interaction between fundraisers and donors, by providing insight into what donors seek and respond to in fundraising relationships (Chapman et al., 2022). It also showed the relevance of meso-level dynamics—between donor and organization—for philanthropic giving (Barman, 2017). Fundraisers follow the "relationship fundraising" paradigm when attending to individual donors' particular interests and building personalized fundraising strategies based on that knowledge as was the case in this study. According to that approach, donors should be viewed as more than simply a means for achieving fundraising goals, and rather as people to be respected who are due enjoyable and satisfying philanthropic experiences (Burnett, 2002). These experiences will, in turn, foster donors' philanthropic spirit and enhance their inclination to support the nonprofit. Fundraisers themselves believe those in their field need to be relationship builders and that "asks" for gifts are best received within the larger people-oriented context (Breeze & Jollymore, 2017)—this study's donors shared similar sentiments. This study also revealed how donors notice the interpersonal details surrounding their giving, a finding that also fits the relationship fundraising paradigm (Burnett, 2002; Hodge & Bout, 2022). Donors' preferences for fundraisers to be fair-minded advocates considering both donor and organizational interests, to carefully shape gifts reflecting donors' priorities and circumstances, to show genuine interest in and care for the donors' wellbeing, and to be sensitive and self-aware communicators, all align with the ideas of relationship fundraising and other research about fundraisers (Breeze & Jollymore, 2017; Shaker & Nathan, 2017). This information can be helpful in fundraiser training and professional development.

In this study male and female major donors alike appreciated fundraisers who were collaborative, good listeners, and supportive--but these are not what fundraiser performance is assessed on. In fundraising generally, women are in the majority (approximately 69%) but perhaps not in major gift work (AFP, 2021; Taylor, 1998). In this study, there was a nearly equivalent number of male and female donors. The behaviors preferred by the donors align with stereotypes of "women's work,"—that it requires a caring and communicative approach derived from listening, nurturing, being open, being empathetic, and attending to detail (Conry, 1991, 1998; Dale, 2017). Dale (2017) and Dale & Breeze (2022), writing about the US and UK respectively, note that these skills are undervalued in society and organizations. Fundraiser performance metrics based on quantity of meetings and dollars did not match up with study donor sentiments about high-quality relationships. But, on the other hand, donor preference that fundraisers be relational may not necessarily align with behaviors that contribute most efficiently to organizational success. For example, in the sales literature low Agreeableness is associated with better objective job performance, especially when income is commission-based (Aziz et al., 2002; Crant, 1995). Low Agreeableness, however, seems unlikely to be preferred by customers, suggesting a disconnect. Fundraiser evaluation would benefit from a more holistic approach that combines information on fundraiser effort, outcomes, and donor satisfaction. This aligns with Penney et al.'s (2011) suggestion that personality research also explore inputs (i.e., within the control of the fundraiser) rather than simply the outcomes (i.e., How much time was spent with a first-time donor? How many conversations were required to finalize the gift parameters?).

5.2 | The professional and the interpersonal

The findings highlight the complexity of what "professional" means in the context of philanthropic relationships. According to the AFP (1993) Donor Bill of Rights, "all relationships… will be professional in nature." Donors assessed fundraisers' professional acumen in ways that went beyond traditional measures of professionalism (i.e., a standard set of knowledge, ability to self-govern as a field, professional ethics, a commitment to the public good) (Shaker et al., 2019) and toward several interpersonal skills. To the donors in this study, professionalism manifested in the fundraisers' expertise in the functions, logistics, and technical aspects of raising money. The learned skills of asking for money, knowledge of the field, and institutional awareness of the fundraisers, coupled with ethical principles, were important and allowed "relationships of trust" to form (Breeze & Jollymore, 2017). Field-specific knowledge and skills, however, were most effective within a flourishing relationship. Professionalism also encompassed the fundraisers' adroitness in facilitating positive interpersonal interactions, their demonstrations of empathy and emotional intelligence, and their tendency to take joy in fostering philanthropy. One donor noted that perhaps just getting to know the fundraiser in a one-dimensional way would be simpler, but trust would ultimately be missing. The donors' views of fundraising professionalism were

multifaceted, showing the importance of preparing major gift fundraisers to form relationships that are gratifying and trusting but that also feature appropriate boundaries, as set forth by the field as well as fundraisers themselves.

The participants echoed what fundraisers say is required for exemplary fundraising, while bringing new clarity about the interpersonal dimension of major gift making. It comes as no surprise that donors expect technical expertise—regarding fundraising strategies and vehicles as well as institutional needs and systems—as other studies have reported (Nagaraj, 2014; Shaker & Nathan, 2017). Donors also appreciated it when fundraisers represented their interests *and* institutional interests, echoing Breeze and Jollymore's (2017) "honest broker." This fits with Nyman et al.'s (2018) "negotiator", who discerns the intersection of donor and institutional interests, and "networker", who brings the donor into the institution. Donors' respect for institutional interests is counter to concerns that seek only to impose their preferences (Breeze, 2021). Breeze's (2017) concept of fundraisers as framing needs recognizes that fundraisers must have subject knowledge and patience as they help donors learn about causes; this study's notion of shared ownership of gifts took this idea a step further. Shared ownership of gifts fits well with Hodge's (2016) practice-based model of transformational fundraising, in which fundraisers and donors work side-by-side to craft gifts. The donors in this study took fundraisers' recommendations and input seriously. Many donors' ideas about their gifts were nascent and they wanted the fundraisers' (and institutions') formative help and input. Therefore, the fundraisers were not merely soliciting gifts, they were facilitating philanthropy by enabling donors' altruistic tendencies (Breeze, 2017). Fundraisers, therefore, can be encouraged to help donors shape gifts that meet organizations' (and communities') greatest needs.

5.3 | Empathy and ethics

This study reveals more about how rooted fundraising relationships and gift formation—and relationship fundraising—are in fundraisers' empathy. Practically speaking, cognitive empathy was evident wherein fundraisers understood what donors were thinking and feeling, broadly influencing their fundraising strategies and cueing their interpersonal actions (See Martingano & Konrath, 2022, for a discussion of definitions and forms of empathy). Affective empathy was also perceived and preferred by donors; they could tell if a fundraiser felt compassion for them based on how they responded to the donors' personal challenges and circumstances. Empathic and altruistic tendencies were evident within all study characteristics. This discovery was facilitated by the HEXACO codebook and the awareness that altruism (vs antagonism) is boundary-crossing and manifests across several personality domains (specifically: Humility-Honesty, Emotionality, Agreeableness) (Ashton & Lee, 2007). Breeze (2017) found that fundraisers were extraverted and sociable and other studies' emphasized communication skills (Duronio & Tempel, 1997; Nagaraj, 2014; Shaker & Nathan, 2017). This study, through the "sociable communicator," shows that sensitivity to the donor and adaptation made the social interactions feel meaningful and not shallow. The "altruistic supporter," meanwhile, is genuinely interested in the well-being of donors and donors can tell it's "more than a job" for the fundraisers. Empathy has long been a buzzword in fundraising practice; in 1988 Panas described empathy as "care for others". Empathy also turned up in prior research as "emotional intelligence" (Breeze, 2017; Shaker & Nathan, 2017), other-centeredness (Shaker & Nathan, 2017), and warmth (Duronio & Tempel, 1997). This can have downsides as Breeze (2017) noted: fundraising can be "emotional labor" as fundraisers regulate and even mask their own emotions to provide a favorable experience for donors.

The fundraisers' personal integrity, admirable character, and sound ethical compasses were greatly valued by the study donors. The donors believed the fundraisers did the work not just for money but for noble reasons such as devotion to the institution and gifts positive outcomes for the institution. These traits align closely with the Humility-Honesty domain, with its facets of sincerity, fairness, greed-avoidance, and modesty (Lee & Ashton, 2009). The donors felt they shared goals with the fundraisers, who were also equally committed and deeply invested. The Duronio and Tempel (1997) and Shaker and Nathan (2017) studies of fundraisers included ethical orientation as a trait of successful fundraisers, but this is not a typical finding. As "even-handed representatives" the fundraisers attended to donors and organizational beneficiaries simultaneously, akin to what is suggested by MacQuillin and Sargeant (2019) as a "rights-balancing" ethical approach. Society's negative stereotypes about the field and the associated stigma could be a reason that fundraiser ethics and integrity were so important to the donors (Breeze, 2017; Meisenbach et al., 2018; Shaker & Nathan, 2017). After all, philanthropy and fundraising must be considered within the macro societal context (Barman, 2017).

This study's "honorable citizen" showed that donors formed opinions of fundraiser ethics beyond rule following in the workplace. It is worth noting that there is a danger of donors' projecting their own ethical values upon fundraisers—for example, hetero-normative family values—that could lead fundraisers to engage in more emotional labor in order to conform (Breeze, 2017). This study was from the perspectives of the donors and from within relationships without this issue; other circumstances could be quite different. Ongoing attention to the field's ethical guidelines, fundraisers' ethical preparation, and support for ethical practices are important investments for fundraising educators and nonprofit leaders. Fundraisers can be trained to put the donors' interests together with organizations' interests. They can learn ethics—of the field—but also larger ethical frameworks that explain decision-making. They can also be supported in developing strategies and boundaries to protect their own ethics and sense of self in challenging situations with donors.

6 | LIMITATIONS AND FUTURE RESEARCH

This study contributes to theoretical and practical knowledge about fundraising. Its limitations present interesting opportunities for additional exploration. The tension of donor preferences for relationship

development and organizational needs for accelerated fundraising and the gendered dimensions of major gift fundraising certainly warrant more study, using different research methodologies and samples. Likewise, the charitable triad model and the donor-beneficiary interface could be an avenue for examining how to evolve relationship fundraising for a new era—maintaining respect for donors and enhancing consideration of beneficiaries and their needs (Chapman et al., 2022).

Only positive relationships by the fundraisers' standards were included in the study. Additional research featuring donors with a broader range of experiences, ideally in larger numbers than in this exploratory study and recruited through other means, is an important next step. Fundraisers' perspectives on navigating difficult relationships are also worth exploring. The donors (and fundraisers) were mixed in gender and age, but racial diversity was completely lacking among the donors and only three of the fundraisers were people of color. This study featured only US Midwest higher education alumni donors. Further understandings will come from studies featuring a more diverse sample in race/ethnicity, a variety of organizational affiliations, different types of organizations, and a range of domestic and international settings.

This study applied a new approach to an old question of fundraising relationships. It used direct, in-depth conversations with donors that were subsequently analyzed using a HEXACO codebook. In the future, the HEXACO inventory could be used in a more traditional manner for self-assessments or paired assessments by fundraisers and donors. These insights could be interfaced with practical interests in fundraising outcomes such as time dedicated to the relationship, time to gift, purpose of gift, or more philosophical questions around the gendered nature of fundraising. It would be interesting to examine the situational conditions surrounding the fundraisers' work, including reward structures, metrics, donor portfolios, and fundraiser independence and team structure, as has been done using the HEXACO with salespeople (Penney et al., 2011). This study focused on the donors' interpretations of the fundraisers' characteristics; the HEXACO would enable a comparison between donor perceptions and fundraisers' own assessments.

7 | CONCLUDING THOUGHTS

Major gifts make up an increasing proportion of charitable donations in the US, and to higher education in specific (Council for Advancement and Support of Education, 2022; Giving USA Foundation, 2022), and are sought after in contexts around the world (Breeze & Scaife, 2015). This study makes a central contribution to understanding major gift donors and how they interface with fundraisers and organizations, addressing a gap in practical and theoretical knowledge (Chapman et al., 2022). The study was framed by contextual (macro-level) considerations (Barman, 2017). Fundraisers indeed struggle to overcome stigma (Meisenbach et al., 2019), donors put ethics at a premium as a result but also give fundraisers full respect and appreciation for a job (and fundraising relationship) well done. The donors also complicated the notion that it is possible to separate the professional from the personal in fundraising. They respected the fundraisers deeply—for their skills and knowledge at fundraising *and* for being ethical, even-handed, caring, collaborative people and they sought their thoughts and opinions. This is an important discovery that should reassure fundraisers and organizations that deploy relationship fundraising. It is a reminder that fundraisers and organizations have more agency in shaping philanthropy's direction than is commonly thought (Breeze, 2021).

There is no "perfect" fundraiser (Breeze, 2017) and this study is not meant to imply that only certain kinds of people can be successful in fundraising. Instead, it identifies characteristics that donors in this sample valued, many of which can be learned, developed, and encouraged. This was a "point in time" analysis—more such studies will be needed in the coming years as dynamics around and philosophies of fundraising continue to evolve. The more fundraisers know about what their donors think, the better prepared they will be to manage each unique fundraising relationship and gift process—on behalf of organizations, donors, and communities served.

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The author declares no conflict of interest.

DATA AVAILABILITY STATEMENT

Research data are not shared.

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ENDNOTE

[i] The Big 5 model includes "Extraversion" as one of the domains. In the HEXACO, the similar term is presented as "eXtraversion," with the "X" being used in the HEXACO acronym. This paper capitalizes the word as used in the particular model.

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