Public Relations, Marketing and Fundraising in Canadian Nonprofits: Who is better at relationship?

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Abstract

The nonprofit landscape in Canada is extremely competitive and organizations looking to be successful for the long term will need the ability to build effective relationships with their key audiences. Over the last 30 years, the quality of organizational-public relationships (OPR) has been measured by a number of public relations scholars but it was Hon and Grunig (1999) who identified a number of indicators, including trust, commitment and control mutuality. Furthermore, scholarly literature shows there is also the potential for encroachment of public relations by other functions such as fundraising and marketing, as financial sustainability remains a great concern for nonprofits.

This study examines public relations, marketing and fundraising structures in the human services nonprofit subsector in Canada against OPR indicators to explore whether there is a relationship between structure and engagement effectiveness. The researcher deployed a nationwide survey reaching 115 public relations, marketing and fundraising professionals, conducted in-depth interviews with 11 CEOs and senior leaders of nonprofit organizations and analyzed six of their corresponding organization charts in a content analysis.

The research shows that generally the organizations in this subsector enjoy high levels of trust and commitment from their audiences, but control mutuality is an area of weakness. The researcher also found that encroachment of the public relations function was not occurring to a great extent. This study raises possibilities for future research of OPRs and other nonprofit subsectors as well as research that examines the relationship between organizational size and engagement effectiveness.

Introduction

In Canada, almost 2 million people are employed in the charitable and nonprofit sector and another 13 million are volunteers (Imagine Canada, 2016a). In between 2010 and 2013, the total amount donated by Canadians to charitable or nonprofit organizations increased by 14% to $12.8 billion (Brownell, 2015; Turcotte, 2016), even though the overall numbers of donors dropped slightly (Krashinsky, 2016). Examining the total value of donations from Canadian taxfilers (which may include donations people have made up to five years prior and not yet filed), results showed an increase from 2013 of over 2 per cent to $8.8 billion in 2014 (Statistics Canada, 2016). In 2016, Canadians are expected to donate approximately $5 billion over the holiday season—this amount will account for 40% of all donations made in this year (Imagine Canada, 2016c). Currently, the charitable sector in Canada represents $106 billion or 8.1% of the gross domestic product or GDP, which is larger than the automotive or manufacturing industries (Imagine Canada, 2016a). There are more than 86,000 registered charities in Canada (Canada Revenue Agency, 2015); 170,000 if you include nonprofits (Imagine Canada, 2016a).

According to the Canada Revenue Agency (CRA), a nonprofit organization is a "club, society, or association that's organized and operated solely for social welfare, civic improvement, pleasure, recreation, any other purpose except profit" (CRA, 2016). These organizations make essential social and economic contributions in a wide range of areas and the role they play is not filled by business or government (Imagine Canada, 2015). According to Richard Edelman, president of a large, global public relations firm, they represent civil society by coming alongside business and government as constructive critics, enforcing compliance and offering legitimacy (Edelman, 2015). Imagine Canada—one of the country's sector-strengthening organizations—indicates that Canadians want and expect nonprofits and charities to speak out on issues of importance because they know that public policy and decision-making are better when they are at the table (Imagine Canada, 2015).

Yet for years, Canadian nonprofit and charitable organizations have been operating in an extremely competitive environment (Fish, 2015). Heightened competition in a crowded sector, globalization, new technology, downward attitudinal shifts toward authority, rising costs of doing business, changing donor expectations, increased stakeholder proximity and the demand for radical transparency are all factors affecting the way nonprofits operate. Many of these themes are highlighted in *The Authentic Enterprise*, a report and survey of CEOs conducted by the public relations professional association, the Arthur W. Page Society, that underscores the need to better manage stakeholder relationships to help meet the changing state of business (Arthur W. Page Society, 2007).

While nonprofits and charities try to reinvent or reengineer their approach to address this demand and meet the need for more effective public engagement and fundraising, trust in these organizations is waning. The 2015 Edelman Trust Barometer report confirmed that while NGOs were still the most trusted institutions in the world at that time, they also had the biggest decline in trust, going from 66 per cent to 63 per cent from the prior year. This drop in trust was larger than the average decline in trust seen for business (2%) and media (2%) across 27 countries surveyed. In Canada, the trust index scores showed a steady decline in 2013, 2014 and 2015 at 62%, 60% and 53% respectively, but in 2016 this trend reversed and there was a minor increase of 3% from the year prior to 56% (Edelman, 2016). The Muttart Foundation, a private Edmonton-based foundation, published its *Talking About Charities* public opinion poll in 2013 reporting that Canadian charities had high levels of trust, but trust in international development agencies dropped 9% and trust in charity leaders had decreased. Canadians also continued to give charities low ratings for their inadequate reporting of how donations were used, the impact of programs, and charities' fundraising costs (The Muttart Foundation, 2013). In 2016, a survey from the Canadian branch of the Association of Fundraising Professionals (AFP) indicated that four in 10 Canadians believed that charities overstated the ratio of donor dollars allocated directly to programs versus administrative overhead. One in 10 believed charities intentionally misled the public (CanadaHelps, 2016).

In past years, Canadian and international charities have also been accused of financial mismanagement. *MoneySense* magazine captured the sentiment this way: "No one likes feeling that their money is being squandered on lush offices, expensive fundraising dinners or frittered away due to poor management" (Froats & Ephron, 2011). Reports from the *Toronto Star* (Aulakh & Dempsey, 2011; Porter, 2014), *The Globe and Mail* (Friesen & Waldie, 2006; Waldie, 2013; Wente, 2014), *MoneySense* (Brown, 2016a; Brown, 2016b), the *Financial Post* (Brownell, 2015; Brownell, 2016) and *CBC News* (Johnson, 2011) illustrate donors' desires to have more say in how their money is spent and to see the impact of their hard-earned money. The emergence of watchdogs and ratings organizations also demonstrates the demand from donors for a clear picture to help them make informed decisions. Still, Canadians continue to express higher confidence in the charitable sector (73%) than in either the private (63%) or public (62%) sectors (CanadaHelps, 2016).

Rawlins (2008) says the ethics literature encourages organizations to increase the decision-making ability of stakeholders by making business decisions public. Drawing from the "Excellence study" (Grunig, 1992; Grunig, Ed., 1992; Grunig & Dozier, 2002), best public relations practice is about balancing the private interests of an organization with the interests of society and in a two-way symmetrical model of public relations. Strategic communications literature shows that the role of public relations professionals in managing an organization's reputation is not just important, but central to its long-term success.

Building successful organizational-public relationships (OPR) then helps build long-term relationships. OPR research begun by Ferguson (1984) was further developed by Hon and Grunig (1999) and Ledingham and Bruning (2000). Hon and Grunig (1999) conceptualized indicators of long-term OPRs as trust, satisfaction, commitment, and control mutuality or balanced power. O'Neil (2009) says recent public relations research has demonstrated these as valuable outcomes, but there is a lack of scholarship examining the link between public relations tactical efforts and how they affect the indicators despite, "thousands of public relations practitioners spend[ing] their days managing and executing routine, albeit essential, public relations activities such as writing, design, and project management" (p. 264). There is also a gap in the communication research that closely examines the particular issues faced by communicators in nonprofit organizations. Lewis (2005) says that given the size of the sector and its impact on society, there is an opportunity for more communication research to be done.

Given the large size and diversity of the sector, organizations concerned with the financing and delivery of human services or human welfare were selected for this particular study. These included social services benefitting children, youth, families, the elderly and persons with disabilities; health; hospitals; income development; housing; international welfare and emergency relief. Furthermore, the OPR indicators of trust, commitment and control mutuality were examined against the public relations, marketing or fundraising structures in these Canadian nonprofits to determine whether a relationship existed and to see if public relations encroachment was occurring.

Literature Review

In Grunig's seminal work, the "Excellence study" (Grunig, 1992; Grunig, Ed., 1992; Grunig & Dozier, 2002), he emphasized the importance of practitioners to "develop programs at the functional level of public relations to build long-term relationships with these strategic publics" (Grunig, 1992, p. 13). Broom, Casey and Ritchey (1997) said, "public relations is all about building and maintaining an organization's relationships with its publics" (p. 83).

Therefore, the research suggests that the value of the public relations' function can be determined by measuring the *quality* of relationships with strategic publics (Hon & Grunig, 1999). Public relations practitioners' daily efforts then have a direct impact on building trust, satisfaction and commitment (O'Neil, 2009) as they help save organizations money by reducing costs related to litigation, regulation and boycotts, as well as help raise funds by cultivating relationships with donors, consumers and shareholders (Hon & Grunig, 1999).

It's not surprising then that a number of scholars (Bendell, 2000; Crane & Livesey, 2003) suggest that "the essential building block of stakeholder relationships is communication" (Foster & Jonker, 2005, p. 52). According to Bruning and Ledingham (2000), "communication becomes a vehicle that organizations should use to initiate, develop, maintain, and repair mutually productive organization-public relationships" (p. 159).

Organizational-public relationships (OPRs)

Ferguson (1984) was the author of early writings on OPRs for public relations scholars, but his guiding paradigm that public relations practitioners should evaluate the quality of an organization's relationships on dynamic versus static, open versus closed, mutual satisfaction, distribution of power and mutual understanding, agreement, and consensus indicators was not embraced at that time. Grunig, Grunig and Ehling (1992) suggested that key elements of an OPR were reciprocity, trust, credibility, mutual legitimacy, openness, mutual satisfaction, and mutual understanding. However, Waters (2008) stated that, as the value of relationship management became more recognized, scholars began looking outside traditional theoretical perspectives to better understand the impact of relationships. Ledingham, Bruning, Thomlison and Lesko (1997) defined an OPR as the state which exists between an organization and its key publics, and that the actions of either party could impact the economic, social, political, and cultural well-being of the other. Ledingham and Bruning (1998) identified trust, openness, involvement, investment, and commitment as a foundation from which “good organization-public relationships are initiated, developed, and maintained” (p. 55). The authors also said the ways in which OPRs are developed and maintained can engender loyalty toward the organization from key publics (Bruning & Ledingham, 2000).

Broom, Casey and Ritchey (2000) defined OPRs as being “represented by the patterns of interaction, transaction, exchange, and linkage between and organization and its publics” (p. 18). Though dynamic in nature, OPRs can be described at a single point and tracked over time. Indicators of long-term OPRs have been conceptualized by Hon and Grunig (1999) as trust, satisfaction, commitment, control mutuality, exchange relationships and communal relationships and some of these—satisfaction, trust, and commitment—have been highlighted in marketing literature to be primary drivers of loyalty (Sargeant, 2013).

The validity and reliability of Hon and Grunig’s (1999) OPR scale is seen in more recent studies (Hall, 2006; O’Neil, 2006; Waters, 2006). Waters’ (2006) research on nonprofit organizations revealed that the public relations relationship indicators of trust, satisfaction and commitment played a role in differentiated donation giving amounts.

Hon and Grunig (1999) have measured successful relationships on these indicators:

- Trust consists of integrity, dependability and competence:

    - Integrity is the belief that an organization is fair and just.
    - Dependability is the belief that an organization does what it says it will do.
    - Competence is the belief that an organization has the ability to do what it says it will do.
- Commitment is the degree to which parties believe and feel that the relationship is worth the effort and the energy to maintain and promote.
- Control mutuality is about the balance of power between parties. “Although some imbalance is natural, stable relationships require that organizations and publics each have some control over the other” (Hon & Grunig, 1999, p. 3).
- Satisfaction is “the extent to which each party feels favorably toward the other because positive expectations about the relationship are reinforced. A satisfying relationship is one in which the benefits outweigh the costs” (Hon & Grunig, 1999, p. 3).
- Exchange relationships occur “when one party gives benefits to the other only because the other has provided benefits in the past or is expected to do so in the future” (Hon & Grunig, p. 3).
- Communal relationships exist “when both parties provide benefits to the other because they are concerned for the welfare of the other, even when they get nothing in return. For most public relations activities, developing communal relationships with key constituencies is much more important to achieve than would be developing exchange relationships” (Hon & Grunig, 1999).

Trust

Trust has been recognized extensively in relationship literature and is generally found as a fundamental component for beneficial relationships between parties. Trust and its place in public relations has been studied broadly (Bruning & Ledingham, 1999) and has been defined by

Hon and Grunig (1999) as "one party's level of confidence in and willingness to open oneself to the other party" (p. 19). Grona (2014) says that trust is developed through a series of interactions and exchanges built on shared interests which in time evolve into a set of mutual expectations.

Trust also means that an organization will not seek short-term advantage (Hon & Grunig, 1999). It is the basis of long-term relationships in business (Morgan & Hunt, 1994), and is often tied to transparency, corporate social responsibility (CSR), and ethics. Rawlins (2008) says organizations are finding that there are "solid bottom-line benefits to having the reputation of being honest, open, and concerned about society" (p. 72). By building and gaining the trust and loyalty of key stakeholders such as employees, customers, and investors, companies are able to do more than secure a one-time transaction, but rather build a long-term relationship that may increase customer value in the long run (Duncan, 2002).

The need for trust is particularly pronounced for nonprofit organizations. "NGOs are…distinct from other organizational types in regard to their mission and, by extension, their vaulted societal status—manifest in good works, altruism, and morality—which may render them more susceptible than other types of organizations to public disillusionment" (Gibelman and Gelman, 2004, p. 377).

Commitment

Morgan and Hunt (1994) found that commitment, similar to trust, has been recognized as an important component for favorable relationships. They defined commitment as "an exchange partner believing that an ongoing relationship with another is so important as to warrant maximum efforts at maintaining it; that is, the committed party believes the relationship is worth promoting and savoring to ensure that it endures indefinitely" (p. 23).

In public relations research, there are two underlying dimensions of commitment: continuance commitment, which refers to behavioral intent; and affective commitment, which is an emotional orientation or attachment toward an organization (Hon & Grunig, 1999). Interestingly, past research on trust and its link to commitment has not been shown to impact behavior directly (Morgan & Hunt, 1994; Sargeant & Lee, 2004).

Sargeant and Lee (2004) highlighted the importance of commitment in facilitating giving, particularly in nonprofit organizations. Therefore, organizations must focus on building more than just trust, as large increases in trust have a minor impact on giving if commitment is low. Trust, it seems, predicts commitment, which in turn impacts behavior (Morgan & Hunt, 1994; Sargeant & Lee, 2004).

Control mutuality

Control mutuality is about the balance of power between parties. While there may be an imbalance at times, all parties should have input into decisions (Hon & Grunig, 1999) and as Unerman and Bennett (2004) say it is a fundamental right for those impacted to participate in decisions that may affect them “irrespective of the power which that individual holds in relation to others” (p. 804).

Sargeant and Lee’s (2004) nonprofit research measured this mutual influence and found that it was a predictor of commitment among donors. Conversely, attempts to achieve control by one party can result in decreases in perceptions of communicator competence, decreases in satisfaction with the relationship, and increases in the level of activism from other parties (Hon & Grunig, 1999). Still, Foster and Jonker (2005) said that many organizations have interpreted engagement as a form of control where "there is an attempt to organize, structure and thus ‘manipulate’ the relationship in the belief that this will best serve their needs" (p. 51).

There are varying theoretical views when it comes to identifying the stakeholders to whom an organization is considered responsible and accountable. They range from those who can directly influence the achievement of the organization's objectives to those whose life experiences may be affected by the organization's activities (O'Dwyer & Unerman, 2008).

The relationship between OPR indicators

The two-way symmetrical model of public relations (Grunig, 1992) that includes dialogue and mutual understanding helps build trust among publics. Scholars (Sargeant & Lee, 2004; Morgan & Hunt, 1994) have shown that satisfaction produces trust, which positively predicts commitment. In the context of relationship management, Hung-Baesecke and Chen (2013) say these elements of OPRs are in a "continuous developing loop" (p. 228) and if efforts are constantly made, the results of relationship management are "long-term, quality relationships which can contribute to both the bottom line and intangible benefits such as reputation and customer loyalty" (p. 229). And the value of these relationships go beyond an organization's benefits; as Salamon (1992) articulates, "nonprofit organizations play a vital role in creating and sustaining what scholars have come to refer to as "social capital," i.e., those bonds of trust and reciprocity that seem to be pivotal for a democratic society and a market economy to function effectively" (p. 17).

Research Problem and Research Questions

Waters' (2006) research on nonprofit organizations revealed that the public relations relationship indicators of trust, satisfaction and commitment play a role in differentiated donation giving amounts, and overall, trust, commitment, satisfaction and control mutuality have been shown to be important elements in building long-term relationships with donors (O'Neil, 2007; Sargeant & Lee, 2004; Waters, 2006).

Therefore, the main question in this research study is: **To what degree do public relations, marketing and fundraising structures in Canadian nonprofit organizations enable effective OPRs?** This will be explored by analyzing how nonprofit organizations in the human services subsectors are structured, and to determine which structure is best poised to engage in effective OPRs. As such, the following questions were investigated:

RQ1. How are public relations, marketing and fundraising functions structured in these subsectors of Canadian nonprofit organizations?

RQ2. How and to what extent do these organizations engage in OPRs?

RQ3. Is there a link between structure and effective OPRs?

Methods

Because this research project was meant to investigate the current practices in a large subsector, several methods of cross-cutting and complementary data collection were used. The researcher engaged representatives in a cluster of "human services"—social services supporting children, youth, families, the elderly and persons with disabilities; health; hospitals; income development; housing; and internationally-focused organizations supporting welfare and emergency relief—selected from a comprehensive outline from Imagine Canada (2016b).[1] The target organizations were based in Canada and included small-, medium- and large-sized organizations, based on their annual donations.[2]

[1] These are based on 15 classifications defined by Imagine Canada. http://www.imaginecanada.ca/organization-classification-list

[2] Large organizations are those that exceed $1 million in annual donations. According to Mark Brown of *Moneysense* magazine, there are a little over 400 organizations in total in Canada that meet this threshold. http://www.moneysense.ca/save/financial-planning/canadas-top-rated-charities-2017/

First, a quantitative and generalizable web-based Lime survey instrument was administered *(see Appendix F)* through a snowball sampling method, as well as through a free online email distribution service, MailChimp. The survey was open from September 1st to October 21st and survey invitations were sent to 477 representative personnel from September 5-October 12. Out of 592 surveys, 139 were completed for a response rate of 20% and of those respondents, 115 were from the subsectors examined in this study.

The sample frame was generated from a listing of key personnel built from the CharityVillage and Charity Intelligence websites, the Canada Revenue Agency's website, and the Financial Post's analysis of charities from 2015.

In order to get a more in-depth picture of this sector, the researcher also conducted 11 in-depth interviews with CEOs and senior level staff from organizations within the subsectors mentioned above (see Appendix A). Respondents were not limited to the list of target organizations receiving the online survey.

A content analysis was also conducted of six organization charts provided by in-depth interview participants who were comfortable doing so and felt it represented a current reality. This triangulation of data was to further corroborate what survey respondents and interviewees unveiled. The charts outlined the composition of the senior leadership team and the size of the public relations, marketing and fundraising teams (see Appendix B).

Results

The results that follow have quantitative survey results, qualitative interview data, and content analysis data presented in an integrated fashion.

RQ1. How are public relations, marketing and fundraising functions structured in these subsectors of Canadian nonprofit organizations?

There were 115 online survey respondents employed by organizations based in Canada, and they worked in social services benefitting children, youth, families, the elderly and persons with disabilities; health; hospitals; income development; housing; international welfare and emergency relief. The majority of respondents at 37% (n=42) work in social services, followed by health at 27% (n=31) and international welfare at 23% (n=27). Seventy-five per cent (n=86) of respondents work for organizations headquartered in Ontario, 8% (n=9) based in British Columbia and 5% (n=6) in both Alberta and Quebec. Forty-nine per cent (n=56) of respondents work for organizations that raise over $1 million in annual donations, 23% (n=27) for organizations that raise between $100,000 and $1 million, and 16% (n=18) for organizations that raise less than $100,000.

Of the survey respondents, 76% (n= 87) were management staff and 24% (n=28) were not. Out of the management level positions, managers 31% (n=29) and executive directors 16% (n=15) together created the majority.

Table 1

Summary of Responses to Survey Question: At What Level of Management Are You Currently Employed? (n=87; only among those who self-identified as management level)

Management Level	Number Responding (n=87)	Percentage of Respondents
Manager	29	31
Senior Manager	5	5
Director	19	20
Senior Director	6	6
Vice President	5	5
Senior Vice President	1	1
President/CEO	5	5
Executive Director	15	16
Other (National Director)	1	1

No Answer	1	1

Eighty-six per cent (n=48) of respondents employed by organizations that raise more than $1 million annually in donations indicated that communications made up at least 20% of their workload, followed by 52% (n=29) for marketing, 43% (n=24) for fundraising and 41% (n=23) on donor relations. For organizations that raise in between $100,000 to $1 million annually in donations, 78% (n=21) indicated that 20% of their workload was spent on communications, 59% (n=16) on marketing, and 56% (n=15) for both fundraising and donor relations. Eighty-nine per cent (n=16) of practitioners who worked for organizations that raised less than $100,000 in annual donations indicated that 20% of their workload was spent on communications, 61% (n=11) on operations and 56% (n=10) on fundraising.

Those in management positions tend to oversee communications 84% (n=71), marketing 54% (n=46), fundraising 47% (n=40), and donor relations 45% (n=38).

Table 2

Response Summary of Respondents in Management Positions to Survey Question: "What Areas Do You Oversee that Make Up at Least 20% of Your Workload?" (n=87; only among those who self-identified as management level)

Functional Area	Number Responding (n=87)	Percentage of Respondents (%)
Communications	71	84
Government relations	12	14
Advocacy	20	24
Donor relations	38	45
Marketing	46	54
Fundraising	40	47
Finance	9	11

Operations	27	32
Customer service	18	21
Volunteer/Ambassador relations	21	25
Legal	5	6
Board governance	13	15
Other	8	9

Of the 11 nonprofit leaders who took part in the qualitative research (see Appendix A), nine said that they spent the most time and visited most frequently with the fundraising function within their organizations, compared to public relations and marketing. A CEO in a large[3] global organization helping enable affordable housing said:

> What keeps me up at night are the challenges in continuing to grow our fundraising to keep up to the growth in our builds…we are doing that in the second most expensive real estate market in Canada.

The President and CEO of a large hospital foundation providing support for children's healthcare said there is increased competition for charitable dollars:

> If you've got more competition, greater need for funds, and flat sort of revenue...the challenge is how do you increase resources? The only way to do that in today's environment is to take market share from other charities and that's not the optimal outcome. What we would really like to see is, in fact, the charitable pie is growing, and therefore there are more resources available for all charity.

The CEO of a national organization providing support to those living with cancer agreed:

> There is a lot of noise. There are more and more charities, and more people are asking for money. We've got to stand out somehow, differentiate ourselves. It's hard to compete

[3] Size is based on annual donations raised. See *Methods*.

> with those organizations that have cancer in their name and have millions of dollars to spend on fundraising.

However, both the CEO of a large national organization providing social services benefitting women, and the CEO of the global organization providing housing support said that the amount of time and frequency they spent with the fundraising function is more than just an indication of priority—it is also a sign of the function's health as some areas continue to change and develop.

The quantitative data showed that for organizations that raise less than $100,000 in donations and in between $100,000 and $1 million, teams of 1-3 people handled the public relations, marketing and fundraising functions. Once an organization raises more than $1 million in annual donations, public relations and marketing teams are 1-3 people but, fundraising teams are generally 16+ people. The content analysis of organization charts provided to the researcher from six organizations (see Appendix B) partially supported this finding as some of those organizations that raised more than $1 million in donations annually had 30-50+ member fundraising or development teams.

While the public relations teams in many of the organizations may support fundraising, two leaders specifically mentioned the role of communication being one that supported the entire organization. The executive director of a community-based organization enabling food security described how the communications department reported directly to her and how it functioned:

> The communications department supports the development department, but they don't take orders from them. I don't want all of our messages to only have a fundraising spin. If you put communications reporting to the director of development, it becomes a marketing department.

Results in the quantitative data showed the composition of the senior leadership team to be fundraising 75% (n=86) and communications 72% (n=83), essentially both at the decision-making table. Marketing appears to a much lesser extent 52% (n=60). Notably, for organizations that raise less than $100,000 annually in donations, public relations and fundraising functions were equally represented on the senior leadership team at 77% (n =14) while in organizations that raise in between $100,000 and $1 million annually, fundraising was predominantly part of the dominant coalition at 70% (n=19) followed by communications at 59% (n=16). For organizations that raise more than $1 million annually, fundraising and communications were equally found as part of the senior team at 80% (n=45) and 79% (n=44) respectively.

The content analysis of the six organization charts (see Appendix B) showed that fundraising was represented in all senior leadership teams and five also had communications represented. One had marketing represented alongside fundraising and communications.

The professional background of online survey respondents was predominantly communications, journalism and public relations at 59% (n=68), marketing at 39% (n=45), and fundraising at 30% (n=34).

Table 3

Summary of Responses to Survey Question: Your Professional Background Is Made Up of This/These Area(s):

Professional Background	Number Responding (N=115)	Percentage of Respondents
Communications, Journalism, Public Relations	68	59
Marketing	45	39
Fundraising	34	30
Customer Service	25	22
Donor relations	23	20
Other	23	20
Operations	21	18
Advocacy	19	17
Government relations	17	15

Volunteer and Ambassador relations	14	12
Board governance	12	10
Finance	10	9
Legal	3	3

RQ2. How and to what extent do these organizations engage in OPRs?

To understand organizational-public engagement, it is important to know who these organizations are targeting. Not surprisingly, eight interviewees spoke of donors as a key audience. The executive director of a community-based organization for food security also highlighted the "potential donor" as a separate key audience. Six leaders identified government—whether municipal, provincial or federal. Five leaders spoke of the public as one general target audience. "There was a time, maybe 8-10 years ago when we were looking at everybody, wanting to convince all Canadians," said the President and CEO of a global humanitarian development organization. "But for fundraising purposes, the organization has since focused on those most responsive to our messages." This kind of segmentation was echoed by some other leaders: boomers, youth, women, families, celebrities; external audiences like corporations, foundations, major donors, media, corporate social responsibility (CSR) institutions, member associations, program participants; and internal audiences such as staff, board members, and "administration".

A unique finding is that both the CEO of the cancer centres and the CEO of an organization supporting healthcare spoke of the difference between the people their organizations served and their target audiences. The President and CEO of a charity supporting children said:

> Families are not the target audiences. They're the reason we all exist, they're our reason for being. We're supporting those who are supporting the family—through funding, marketing, communications, research, leadership support. We help enable others to deliver their mission, and their target audiences are the corporations, staff leaders and volunteers, Canadian donors, hospitals, corporate donors.

The quantitative research showed that nonprofit practitioners believe their engagement with key audiences is effective at 95% (n=109), though evaluation of their effectiveness varies (see Table 4). Interestingly, raising more money is an indicator that finds itself in fourth place.

Table 4

Summary of Responses to Survey Question: How Do You Know Your Engagement is Effective?

Indicator of Effective Engagement	Number Responding (N=115)	Percentage of Respondents
We hear positive feedback	94	89
Audiences talk to others about us in a positive way	79	75
People want to volunteer for our organization	73	69
We raise more money	70	66
People want to work for our organization	46	43
Other	10	9
I don’t know	0	0

The CEO from a hospital foundation supporting children’s healthcare indicated that his organization has been sending out a donor experience survey for the past four years. This tool gauges the effectiveness of their engagement with stakeholders such as corporations, high-net-worth individual donors, supporters in the general public, and acts as a benchmark for improvements over time. “Are we giving them the right information? Are they able to see the impact that we're having? Are they happy with our communications? Are they happy with the kind of relationship management we're providing?” highlighted the CEO.

Interview candidates also highlighted areas for improvement. Just over half of the interview respondents spoke of the need to improve their organization’s use of social media, digital platforms and tools. The executive director of a national organization of volunteers providing cancer support said:

> We could improve the way we measure engagement because we, like many charities, are still conducting research in older ways. The corporate sector is using much deeper demographic and big data to inform their decisions, whereas charities are still reluctant to use those newer methods and we also don't have the budget to use some of the cutting edge tools that might be available.

Two senior leaders in international development organizations said they need to be more audience-centric and tailored in their engagement approaches. Many donors and volunteers are receiving direct mail appeals and quarterly newsletters, but one leader said, "We're trying to find better ways of keeping volunteers engaged, letting people know about opportunities that exist, and making it easy for them to sign up, get training, the background checks they need. It's certainly an area that we're focusing on right now."

The quantitative survey data showed four main channels of communication (see Table 5): email at 96% (n=110), social media at 85% (n=98), phone 77% (n=89) and in-person visits 74% (n=85). Post mail is still quite high.

Table 5

Summary of Responses to Survey Question: What Channels of Communication Do You Use to Respond to Your Key External Audience(s)?

Communication Channel	Number Responding (N=115)	Percentage of Respondents
Email	110	96
Social media	98	85
Phone	89	77
In-person visits	85	74
Post mail	71	62

Other	13	11
None/we do not communicate	0	0

Eighty per cent (n=92) of survey respondents agreed that their organizations invested a considerable amount of time in hearing from its key external audiences and 40% (n=46) of this group are communicating daily, 23% (n=23) are multiple times a day and 22% (n=25) are communicating monthly.

Table 6

Summary of Responses to Survey Question: How Often Are You Communicating with Your Key External Audience(s)?

Communication Frequency	Number Responding (N=115)	Percentage of Respondents
Daily	46	40
Multiple times a day	26	22
Monthly	25	21
Multiple times an hour	4	3
Hourly	2	1
Not at all	0	0
Don't know/prefer not to answer	12	9

Comparing trust, commitment and control mutuality to the size of organizations, one finds that nonprofit practitioners across all sizes of organizations indicated that their key audiences trust their organizations; on commitment, results are a lower but also consistent. The most striking result surfaces around control mutuality where there was a significant drop in percentages (see Table 7). The lowest percentages result in organizations that raise more than $1 million in donations annually and those that raise less than $100,000; organizations that raise between $100,000 to $1 million in annual donations show an increase in perceived control mutuality by more than 20 percentage points.

Table 7

Summary of Responses to Trust, Commitment and Control Mutuality Questions Presented by Organization Size

OPR Indicator	Question asked to measure OPR indicator: To what extent do you agree or disagree with this statement…	Percentage Responding	Organizations that raise less than $100K (in annual donations)	Organizations that raise $100K to $1 million (in annual donations)	Organizations that raise $1 million or more (in annual donations)
		(N=115)	(n=20)	(n=27)	(n=56)
Trust	Our key external audience(s) trust our organization.	92%	85%	89%	96%
Trust	Our key external audience(s) see our organization as competent and dependable.	91%	90%	93%	94%
Trust	Our key external audience(s) see our organization as honest and transparent.	91%	85%	93%	95%
Trust	Our key external audience(s) believe our organization is committed to meeting their expectations.	92%	90%	93%	94%
Control Mutuality	Our key external audience(s) believe they can influence the decisions or direction of our organization.	42%	40%	63%	36%
Commitment	Our key external audience(s) believe our organization is trying to maintain a	86%	80%	85%	87%

	long-term commitment with them.				
Commitment	Our key external audience(s) believe in our organization and will go the extra mile to support us.	80%	75%	78%	83%
Commitment	Our key external audience(s) speak to others about us in a very positive light.	86%	85%	89%	95%

The high trust scores in the quantitative data were supported by the interview candidates in the qualitative data. The President and CEO of a national charity supporting children with chronic illnesses explained how trust is integral to her organization:

> We live in a high-trust structure in a high-trust world. Families have to trust that if they can come and stay with us, that they're going to be safe and secure while they're on this healing journey for their child. So our trust with families is like a family trust, it's just that intimate.

Referencing hospital partners, Canadian donors, staff, media, corporate donors, she added:

> The whole circle is built on trust. If you don't have trust in any one of those circles, then our organization's role and impact will begin to erode very quickly. Trust is a core fundamental in any high performance, high impact, high delivery partnership or organization.

Six of the 11 interviewees said survey data, brand surveys and sector research showed their organizations were trusted. Five leaders said the number of positive conversations and personal interactions between the organization and their key audiences were a good trust indicator, and five also spoke of the increase in government support and in funding.

Three leaders also said that being asked for quotes by the media, or to contribute thought leadership was a good indicator of trust. "We've been invited by government ministers to consult on a number of areas that they are working on. We continue to do that. I've sat on panels and am asked to give our opinions on a regular basis," said the CEO of a national organization providing social services benefitting women.

Interviewees also felt their target audiences believed they held considerable influence on business decisions, but the quantitative data showed that only 42% (n=48) agreed with this statement (see Table 7). Nineteen per cent (n=22) did not agree at all. Board members and funders have been cited as having profound influence in how money is used, business strategies are executed, and progress is reported. The national director of marketing and communications of a domestic organization said:

> If it's a homeless shelter, depending on the city or province, we need to be looking at how we are fitting in with the housing and homelessness strategies in place. There could also be limitations on the number of days people are allowed to stay or not stay, how many educational programs we can do, and in a long-term care health facility, who can come in and who can't. The government doesn't have influence over the whole organization, but certainly in programs they do.

Finally, the quantitative data showed that nonprofit organizations are performing better than they were five years ago. Fifty-seven per cent (n=65) raised more funds, 50% (n=58) increased staff, and 43% (n=50) onboarded more volunteers.

RQ3. Is there a link between structure and effective OPRs?

The research showed in both the quantitative and qualitative data that the sector is performing better than it was five years ago, and that nonprofit practitioners were regularly engaging with key audiences (see Table 6) and communicating effectively (see Table 4).

Generally, all sizes of organizations indicated that they were highly trusted by their key audiences and that they were committed, based on key OPR indicators (Table 7). The most notable finding emerged around control mutuality where in all sizes of organizations, it had much lower scores at 42 per cent compared to trust and commitment in the high 80 and 90 per cent.

Conversely, the in-depth interview respondents felt that their target audiences had a high degree of influence, particularly from board members, funders, member associations, agencies and donor audiences which show the challenges at a senior level. “You're trying to look globally, nationally, and locally and then pull it down to that single family while building resources for all families,” said the President and CEO of a charity supporting children with chronic illnesses. “We need to be national and local at the same time. Nationally efficient, locally effective,” said another senior leader.

The relationship between the effectiveness of OPRs and structure, however, is unclear. As seen in Table 7, there is a higher percentage of those who believe their audiences could influence the decisions or direction of their organizations in the group that raised $100,000 to $1 million annually in donations. Examining this group, data revealed that 70% (n=19) of respondents had fundraising at the senior leadership team, 59% (n=16) for communications and 52% (n=14) for marketing. In organizations that raised more than $1 million annually, results were balanced in senior teams with 80% (n=45) in fundraising and 79% (n=44) in communications. For groups that raised less than $100,000, both fundraising and communications at 78% (n=14) were at the decision-making table.

Regardless of the size of the organization, the quantitative data showed that communications and fundraising teams were most often made up of 1-3 people and the marketing function was most often blended with the other two functions. Larger organizations showed sizable fundraising teams with 32% (n=18) having 16+ people, but the communications and marketing teams remained 1-3 people.

Finally, for organizations that raised over $1 million in donations annually, results leaned toward showing a trend of engagement effectiveness being measured by raising more money, as it was the second-highest indicator percentage-wise versus being a third- or fourth-place indicator as it was for organizations of other sizes.

Conclusion

Structural and functional encroachment of public relations

While evidence suggests that nonprofit organizations are performing reasonably well compared to five years ago, effective relationship management and engagement of key audiences continues to be necessary to help them secure a place in the future in this competitive environment.

The majority of the senior leaders in the qualitative data set (see Appendix A) spoke of the need to grow funding and to help their organizations remain sustainable. Nine of the 11 interview candidates spent most of their time and visited most frequently with the fundraising function. The CEO of a hospital foundation providing support for children's healthcare echoes this idea: "The philanthropic pie is not growing," he says. "With the polarization of wealth, charitable giving is one of the first things to go when you don't have discretionary income." The ability to engage audiences and to partner effectively then becomes of paramount importance and therefore has direct implications for the public relations function.

This study suggests that while the fundraising function clearly has its place in these organizations, structural encroachment of the public relations function is not occurring to a large extent. Fundraising teams were larger in organizations that raised more than $1 million in annual donations, but they did not assume a functional dominance because public relations teams generally found themselves as part of the senior leadership team as well - evident in both the quantitative and qualitative data. This finding supports Kelly's (1991) study of fundraising and public relations in charitable organizations where she found the majority of practitioners advocated for separate-but-equal departments. Kelly goes as far as (1994) saying the public relations' value diminishes when encroachment occurs from marketing, fundraising, human resources or other functions because public engagement goals are overshadowed by those functions.

Kelly's (1991) study also shows the degree to which CEOs have influence—they can subordinate public relations to fundraising and put an end to any separate-but-equal structures. Senior executives, hence, have the power to help or hinder strategic communications in the way they create their organization charts. The content analysis in this study revealed that in some organizations, the separate-but-equal scenario was a reality and clearly evident at senior levels.

According to Oliviera (2016), it is ideal when the communications department is co-creating initiatives and is integrated at the strategic level. She says that besides donors, "you also need to communicate with the communities you serve, volunteers, foundations, or government funders, board members, employees, influencers or experts in your space, policy makers, members and other stakeholders" (Oliviera, 2016). Kelly (1992) even defines fundraising as a subset of communications, describing it as "the management of communication between a charitable organization and its donor publics" (p. 6).

Lastly, the qualitative research in this study suggests that relationship management and engagement is increasingly everyone's job, not belonging to one functional area. While seven executives said responsibility lay with the CEO, three said with communication and one said fundraising, many of the leaders said it was woven into a wide variety of roles. These included advocacy, member services, research and development, youth engagement, programs and evaluation, volunteers and staff. This shows the pervasive nature and changing requirements of relationship building for charitable organizations, and that it is becoming increasingly “table stakes”. Not everyone, however, will be apt at relationship management and this illuminates an opportunity for the public relations function to act as the leaders and trainers within their organizations.

OPR indicators of trust, commitment and control mutuality

The results in this study show that, overall, nonprofit practitioners in human service organizations are an optimistic group. They believe they have high levels of engagement, trust and commitment with their key publics. While OPR indicators for trust and commitment are high in the quantitative data, control mutuality clearly appears as an area of weakness (see Table 7).

Conversely, CEOs and senior executives in the qualitative data said their key audiences had a high degree of influence, and they named funders and board members most frequently. The incongruence of the level of influence found between the qualitative and quantitative data could be due to the proximity that senior executives have to decision-makers to better understand the type of influence exerted. Or, that senior executives view the influence exerted as prominent, but others see it as more cursory or peripheral. Finally, there could also be a variance in the way “target audiences” and “audiences served” are viewed, meaning funders may be a target audience perceived to have high influence, but beneficiaries may have less influence as they are not considered a target audience. This interpretation however conflicts with Hon and Grunig’s (1999) definition, where power imbalances are recognized but that control should exist for each public, and is true control mutuality at play.

Overall, what emerges out of this data is that public relations, marketing and fundraising professionals should focus their efforts more on approach rather than structure. This means that when leaders are organizing their executive teams, getting the right structure in place is important but it is not the most significant consideration. Staff members in almost every area of the business will need to be equipped to listen to and allow key audiences influence to forge positive change for their organizations. The senior leader who understands communication and relationship management can help all parts of the business acquire these skills.

There is a risk however of being too focused on target audiences, particularly donors. According to the CEO of a large national organization providing support to those living with cancer: “Charities have to be very cautious about a donor-centred approach—that’s different than donor driven. If someone comes along and gives $100,000 and says please launch a program for big toe cancer, well, some charities will get caught in that and accept the money. I'm exaggerating but you see how it can take people off their mission.” Ostrander and Schervish (1990) also highlight the tendency for organizations to give more power to the donor than recipient even though philanthropy fundamentally is a social relation of giving and getting between donors and recipients.

Into the future

Based on this research study, there are a few practical actions organizations can take to help further foster trust, commitment and mutual influence with their key audiences:

- Ensure that the senior leadership team includes a functional leader who represents communications in its holistic sense, and is able to engage with a range of publics in addition to donors. E.g. employees, government, media, board members, and other publics.

- Help equip all external communicators with training so they understand how not only to promote messages, but to also receive feedback and escalate it to key decision-makers to affect change.
- Ensure that communication touchpoints are frequent as research suggests that those who are aware of an organization's activities will give them higher ratings on trust, commitment, and control mutuality than those who are not aware (Hall, 2006).
- Communicate with donors outside of the fundraising context; invite them to special events, give them news updates (Waters, 2009b) and give them more personalized communications as these are likely to result in more repeat donations (Waters, 2010).
- Allow audiences, including beneficiaries, a variety of ways to give feedback, such as focus groups, social media councils, private phone lines, face-to-face forums, volunteer initiatives and board member invitations, to help wrestle through tough decisions as well as testing out campaign ideas (Sargeant, 2013).
- Engage in trust-building activities such as:
    - Clearly articulating the organization's vision, mission and values.
    - Stewarding organizational resources responsibly, showing impact with beneficiaries (Sargeant, 2008) and explaining how donations will be used (Sargeant and Lee, 2004).
    - Adhering to appropriate standards of professional conduct whether set by the Better Business Bureau or Imagine Canada.

A few larger questions about the future were also raised by some of the leaders. The leader of a hospital foundation providing support for children's healthcare asked, "What will be the affinity from Canadians for nonprofit causes in the future?" The CEO of the global humanitarian development and emergency relief organization questioned, "What is the value of us intermediaries, when donor and beneficiaries can work together?" These questions point to an altered future for nonprofits where their value may lie more in the articulation, measurement and reporting of results and impact, or having the resources to imagine more effective models of business or engagement, rather than their current traditional way of operating.

Public relations practitioners therefore must recognize that while they are managing and engaging in key relationships, they also need a solid grasp of the financial and organizational challenges to be effective. Hutton (2001) says, "despite incessantly describing itself as a management function, public relations continues to suffer from a general lack of respect and frequent lack of success in meeting organizational goals because so few of its practitioners and scholars exhibit a clear understanding of business subjects" (p. 212). Ten of the 11 interview candidates highlighted fundraising as the biggest challenge for the future, and six leaders spoke of the difficulty of the rising costs of doing business.

Finally, in organizations that have a "fundraising first" position or focus, there is a risk that they may lose two-way engagement with key audiences and impede the building of trust and commitment. It is important to remember that organizations that stay in contact with key audiences increase loyalty and also enhance their reputations. It is likewise important for control mutuality to be practiced in more than a cursory sense; this could be through testing out a campaign plan or wrestling through a reputational matter. Any scenario where key audiences can give input and affect business decisions would further engender trust. It is in these areas strategic communications is best employed.

Limitations and Opportunities for Future Research

While every effort was made to reduce the limitations in this study, there are a few.

The researcher is a communications professional employed by an international development organization in the nonprofit sector and it is possible that she was analyzing the research through her own bias and experience.

The researcher also used a snowball sampling method of recruitment, engaging friends and colleagues in the nonprofit sector who may have held similar views, and this may have impacted the qualitative and quantitative data.

The sample size consisted of 115 respondents for the quantitative data, 11 candidates for in-depth interviews and six pieces of content for the analysis. As these are very small samples relative to the 150,000 nonprofit organizations that exist in Canada, results cannot be generalizable to the nonprofit sector as a whole.

There were also limitations in terms of the data. The practitioners who took part in the online survey self-identified answers on behalf of their key audiences. Because this study did not survey the audiences themselves, results may not be representative of that group. Also, organizations represented in the qualitative data were from larger-sized organizations; the research would have benefitted from a personal perspective from an individual who works in a smaller nonprofit organization.

Despite these limitations, this research study is valuable to the nonprofit community and will help fill some of the gap in existing research for Canadian nonprofit organizations and effective engagement.

This research can serve also as springboard for future research. Because only the human services subsector was examined, it would be interesting to see whether the same results would be found in other subsectors, such as arts and culture, environmental causes and/or education, particularly around the structure and sizes of organizations and their effect on OPR indicators.

It could also be worthwhile to explore how these structures and sizes of nonprofit organizations in Canada perform against the other Hon and Grunig (1999) OPR indicators of satisfaction, exchange and communal relationships.

Finally, one notable finding in this research was that organizations that raised in between \$100,000 to \$1 million in annual donations had a slightly higher level of control mutuality than the other two sizes of organizations. It would be useful to explore why this is the case in future research.

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Appendix A: Interview Respondents for Qualitative Research

Interviewee	Title	Organization Description*
1	Vice President of Communications & Public Engagement	International development organization focusing on poverty alleviation.
2	President & CEO	Global humanitarian development and emergency relief organization.
3	National Director of Marketing & Communications	Domestic social service provider and international humanitarian organization.
4	Executive Director of Ontario Division	National organization of volunteers providing cancer support.
5	CEO	Global organization providing support to enable affordable housing.
6	CEO	National organization providing social services benefitting women.
7	President & CEO	National charity supporting children with chronic illnesses.
8	Executive Director	Community-based organization providing support to enable food security.
9	President & CEO	National organization providing counseling services for young people.
10	CEO	National organization providing support to those living with cancer.
11	President & CEO	A hospital foundation providing support for children's healthcare.

*To protect the identities of the in-depth interview respondents, the organization descriptions are summarized at a very high level.

Appendix B: Organizational Charts for Content Analysis

Organizational Charts	Description
1	Domestic social service provider and international humanitarian organization.
2	National organization providing social services benefitting women.
3	Community-based organization providing support to enable food security.
4	National organization providing support to those living with cancer.
5	A hospital foundation providing support for children's healthcare.
6	National organization providing counseling services for young people.

Appendix C: Letter of Information for Interviews

Public Relations, Marketing and Fundraising in Canadian Nonprofits: Who is better at relationship?

Researcher: Julia Rim Shepard, Masters Candidate of Communication Management

Principal Investigator:
Julia Rim Shepard
Department of Communications
Studies and Multimedia
McMaster University
Hamilton, Ontario, Canada
Telephone:416-878-7167
Email: rimshej@mcmaster.ca

Faculty Supervisor:
David Scholz
Department of Communications
Studies and Multimedia
McMaster University
Hamilton, Ontario, Canada
Telephone: 416-964-4104
Email: dscholz@leger360.com

Purpose of the Study:

You are invited to take part in this study that will assess to what degree public relations, marketing and fundraising structures of Canadian nonprofit organizations enable effective communication and interaction with their key audiences. The intent is to reach nonprofit managers who work in organizations based in Canada. In Canada, almost 2 million people are employed in the sector, and every year Canadians collectively donate millions of dollars to their favourite causes. Due to heightened competition, globalization, technology and a host of other factors, these organizations must find a way to better engage the public and secure funds. This study will look at how this is done.

What will happen during the study?

You are invited to take part in a one-on-one interview that will take about 30 minutes and these will be conducted either in person, by phone or over Skype. You will be asked questions about how your organization engages key audiences and how you measure success. You'll also be asked about how your teams are structured. Lastly, you'll be asked about what is needed to be successful in the future. Some examples of questions are: How and how well do you engage with your key audiences? What are the biggest business challenges you have encountered recently? What will you face 5 years down the road? The researcher will record the notes by hand and also record audio with an Android mobile phone recording device.

Are there any risks to doing this study?

The risks involved in participating in this study are minimal. However you may feel concerned about how others will react to what you say. Please be assured that any answers you provide are strictly confidential should you desire it. Quotes may be used but they will not be attributed to you, or your organization if you do not want them to be. You can skip questions that make you feel uncomfortable or you do not want to answer. It is not likely that there will be any discomforts associated with the questions, but you can stop taking part at any time. Taking part or not taking part in this study will not affect your status at your workplace or any services you receive as a member of any of the sponsoring organizations of this research.

It is possible also that you may have a pre-existing relationship with the investigator, who works for another nonprofit organization, or with sponsoring organizations of this research. You should not feel obligated in any way to participate in this research on the basis of these relationships.

Are there benefits to taking part in this study?

You will not benefit directly from this research, but the researcher expects that the results will be of interest to the larger nonprofit sector and may be useful for publication or presentation at an industry conference. It is expected that this research will yield key insights and be of interest to the broader communications community.

Confidentiality:

You are participating in this study confidentially if you desire it. If requested, your name or any information that would allow you to be identified will not be used. No one but my supervisor and I will know whether you were in the study unless you choose to tell them. Quotes may be used but they will not be attributed to you or your organization if you do not want them to be. While every effort will be made to protect your anonymity should you desire it, you may be identifiable by the information you share, so please keep this in mind.

If the interview is conducted over Skype, you should be aware that Skype is not a secure form of communication and the researcher cannot assure complete confidentiality of information transferred this way.

The information you provide will be kept in on a password protected computer and any hard documents will be kept in a locked desk cabinet in a home office where only the researcher will have access to it. Once the study is complete, an archive of the data without identifying personal information will be maintained until August 31, 2017 and then it will be destroyed.

Participation and Withdrawal:

Your participation in this study is voluntary. You can stop or withdraw from the interview for whatever reason, even after signing the consent form or part-way through the study or up until approximately October 7, 2016 when I will be compiling and analyzing all of the data for this study.

If you decide to withdraw, there will be no consequences to you. In cases of withdrawal, any data you have provided will be destroyed unless you indicate otherwise. If you do not want to answer some of the questions you do not have to, but you can still be in the study.

Once you have submitted your responses for this interview, your answers will be put into a database and will not be identifiable to you.

Information about the Study Results:

I expect to have the study results written into a research paper by approximately December 31, 2016. If you would like a brief summary of the results, please contact me separately and I will send them to you. Please indicate how you would like these results sent to you. Alternatively, you may include your contact information on the following consent form.

Questions about the Study:

If you have questions or need more information about the study itself, please contact me at:

Julia Rim Shepard
Email: rimshej@mcmaster.ca
Telephone: 416-878-7167

This study has been reviewed by the McMaster University Research Ethics Board and has received ethics clearance. If you have concerns or questions about your rights as a participant or about the way the study is conducted, please contact:

McMaster Research Ethics Secretariat
Telephone: 905-525-9140 ext. 23142
c/o Research Office for Administrative Development and Support
Email: ethicsoffice@mcmaster.ca

CONSENT

- I have read the information presented in the information letter about a study being conducted by Julia Rim Shepard of McMaster University.
- I have had the opportunity to ask questions about my involvement in this study and to receive additional details I requested.
- I understand that if I agree to participate in this study, I may withdraw from the study at any time or up until **approximately October 7, 2016.**
- I have been given a copy of this form.
- I agree to participate in the study.

Signature: ____________________________________ Date: ______________________

Name of Participant (Printed): ____

1. I agree that the interview can be audio recorded.

☐ Yes ☐ No

2. ☐ Yes, I would like to receive a summary of the study's results.

Please send them to me at this email address: ______________________________

Or to this mailing address: ____

____

____

☐ No, I do not want to receive a summary of the study's results.

Appendix D: Letter of Information for Online Survey

**Public Relations, Marketing and Fundraising in Canadian Nonprofits:
Who is better at relationship?**

Researcher: Julia Rim Shepard, Masters Candidate of Communication Management

Principal Investigator:	Faculty Supervisor:
Julia Rim Shepard	David Scholz
Department of Communications Studies and Multimedia	Department of Communications Studies and Multimedia
McMaster University	McMaster University
Hamilton, Ontario, Canada	Hamilton, Ontario, Canada
Telephone: 416-878-7167	Telephone: 416-964-4104
Email: rimshej@mcmaster.ca	Email: dscholz@leger360.com

Purpose of the Study:

You are invited to take part in this study that will assess to what degree public relations, marketing and fundraising structures of Canadian nonprofit organizations enable effective communication and interaction with their key audiences. In Canada, almost 2 million people are employed in the sector, and every year Canadians collectively donate millions of dollars to their favourite causes. Due to heightened competition, globalization, technology and a host of other factors, these organizations must find a way to better engage the public and secure funds. This study will look at how this is done.

What will happen during the study?

You are invited to take part in a 10-minute survey. You will be asked questions about how your organization is structured and the domain of the leaders who lead key areas being investigated in this survey. You'll also be asked about key audiences and how you measure success. Lastly, you'll be asked about the size of your organization.

Are there any risks to doing this study?

The risks involved in participating in this study are minimal. However you may feel concerned about about how others will react to what you indicate on the survey. Please be assured that any answers you provide are strictly confidential. You can skip questions that make you feel uncomfortable or you do not want to answer. It is not likely that there will be any discomforts associated with the questions, but you can stop taking part at any time. Taking part or not taking part in this study will not affect your status at your workplace or any services you receive as a member of any of the sponsoring organizations of this research.

It is possible also that you may have a pre-existing relationship with the investigator, who works for another nonprofit organization, or with sponsoring organizations of this research. You should not feel obligated in any way to participate in this research on the basis of these relationships.

Are there benefits to taking part in this study?

You will not benefit directly from this research, but the researcher expects that the results will be of interest to the larger nonprofit sector and may be useful for publication or presentation at an industry conference. It is expected that this research will yield key insights and be of interest to the broader communications community.

Confidentiality:

You are participating in this study confidentially using McMaster's particular instance of LimeSurvey that is specifically designed to help researchers maintain confidentiality of participant's data. Once answers have been submitted, results cannot be removed, since participation is done anonymously. While every effort will be made to protect your anonymity should you desire it, you may be identifiable by the information you share, so please keep this in mind.

Results will be collected by LimeSurvey and then exported on to a password protected computer. The data will be put onto the secure McMaster cloud and will only accessible by the researcher through a password. Only the researcher will have access to this data. Once the study is complete, data in relation to this survey will be maintained until August 31, 2017 and then it will be destroyed.

Participation and Withdrawal:

Your participation in this study is voluntary. You can stop the survey at any time. If you decide to withdraw, there will be no consequences to you.

Once you have submitted your responses for this anonymous survey, your answers will be put into a database and will not be identifiable to you. This means that once you have submitted your survey, your responses cannot be withdrawn from the study, because I will not be able to identify which responses are yours. If you do not want to answer some of the questions you do not have to, but you can still be in the study.

Information about the Study Results:

I expect to have the study results written into a research paper by approximately December 31, 2016. If you would like a brief summary of the results, please contact me separately and I will send them to you. Please indicate how you would like these results sent to you.

Questions about the Study: If you have questions or need more information about the study itself, please contact me at:

Julia Rim Shepard
Email: rimshej@mcmaster.ca
Telephone: 416-878-7167

This study has been reviewed by the McMaster University Research Ethics Board and has received ethics clearance. If you have concerns or questions about your rights as a participant or about the way the study is conducted, please contact:

McMaster Research Ethics Secretariat
Telephone: 905-525-9140 ext. 23142
c/o Research Office for Administrative Development and Support
Email: ethicsoffice@mcmaster.ca

Appendix E: Interview Questions

1. Who are your key audiences?
2. How much influence do your target audiences have on your business decisions? Can you give me an example that illustrates this?
3. How and how well do you engage with your key audiences?
4. Would you say they trust you? How do you know?
5. Which position or business function is best poised to lead interaction with your key audiences?
6. What are the characteristics of the person who leads this function?
7. When thinking of public relations, marketing and fundraising teams, with which team do you spend the most time reviewing business? Why?
8. When thinking of public relations, marketing and fundraising teams, with which team do you visit with most frequently to review business? Why?
9. What are the biggest business challenges you have encountered recently? What will you face five years down the road?
10. In your opinion, what skills will you need to be effective in the future to best engage and interact with your key audiences?

Appendix F: Survey Questions

1. What nonprofit sector does your organization represent? (Only those who checked health, hospitals, social services, development and housing, or international were allowed to continue on with the survey.)

    - Arts and culture
    - Sports and recreation
    - Education and research
    - Universities and colleges
    - Health
    - Hospitals
    - Social services
    - Environment
    - Development and housing
    - Law advocacy and politics
    - Grant-making, fundraising and voluntarism
    - International
    - Religion
    - Business and professional associations, unions
    - Other

2. What is your title? (Only those who were managers and above were allowed to continue on with the survey.)

    - Manager
    - Senior manager
    - Director
    - Vice president
    - Senior vice president
    - CEO
    - Other

3. What core area(s) do you oversee, that make(s) up at least 20 of your workload? Please check all that apply.

    - Communications
    - Government relations
    - Donor relations
    - Marketing
    - Fundraising
    - Finance
    - Operations
    - Customer service
    - Board governance
    - Other

4. What is your primary professional background? Please check all that apply.

    - Communications, journalism, public relations
    - Government relations
    - Donor relations
    - Marketing
    - Fundraising
    - Finance
    - Operations
    - Customer service
    - Board governance
    - Other

5. In your organization, which of the following functions are part of the senior leadership team? Please check all that apply.

    - Communications or public relations
    - Fundraising
    - Marketing
    - I don't know

6. In your organization, what is the size of the team handling the public relations function?

    - 0
    - 1-3
    - 4-6
    - 7-10
    - 11-15
    - 16+
    - I don't know/prefer not to answer

7. In your organization, what is the size of the team handling the marketing function?

    - 0
    - 1-3
    - 4-6
    - 7-10
    - 11-15
    - 16+
    - I don't know/prefer not to answer

8. In your organization, what is the size of the team handling the fundraising function?

    - 0
    - 1-3
    - 4-6

- 7-10
- 11-15
- 16+
- I don’t know/prefer not to answer

9. Please mark the teams that are combined, if any:

- Public relations/marketing
- Public relations/fundraising
- Marketing/fundraising
- Public relations/fundraising/marketing
- None are combined

10. To what extent do you agree or disagree with this statement: My organization currently invests a considerable amount of time hearing from key external audiences.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

11. What channels of communication do you use to respond to your most important external audience? Please check all that apply.

- In-person visits
- Post mail
- Email
- Phone
- Social media
- Other
- None/we do not communicate

12. How often are you communicating with your most important external audience?

Multiple times an hour	Hourly	Multiple times a day	Daily	Monthly	Not at all	Don't know/ Prefer not to answer

13. To what degree do you believe your engagement is effective with your most important external audience?

- Extremely effective
- Somewhat effective
- Mildly effective
- Not effective at all

- Don't know/prefer not to answer

14. (For those who checked off the top three options for the previous question.) How do you know your engagement is effective? Please check all that apply.

    - We raise more money
    - We hear positive feedback
    - Audiences talk to others about us in a positive way
    - People want to work for our organization
    - People want to volunteer for our organization
    - Other
    - I don't know

15. To what extent do you agree or disagree with this statement: Our key audiences trust our organization.

    - Agree
    - Somewhat agree
    - Neither agree nor disagree
    - Somewhat disagree
    - Disagree
    - Don't know/prefer not to answer

16. To what extent do you agree or disagree with this statement: Our key audiences see our organization as competent and dependable.

    - Agree
    - Somewhat agree
    - Neither agree nor disagree
    - Somewhat disagree
    - Disagree
    - Don't know/prefer not to answer

17. To what extent do you agree or disagree with this statement: Our key audiences see our organization as honest and transparent.

    - Agree
    - Somewhat agree
    - Neither agree nor disagree
    - Somewhat disagree
    - Disagree
    - Don't know/prefer not to answer

18. To what extent do you agree or disagree with this statement: Our key audiences believe our organization is committed to meeting their expectations.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

19. To what extent do you agree or disagree with this statement: Our key audience believes it can influence the decisions or direction of our organization.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

20. To what extent do you agree or disagree with this statement: Our key audience believes our organization is trying to maintain a long-term commitment with them.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

21. To what extent do you agree or disagree with this statement: Our key audiences believe in our organization and will go the extra mile to support us.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

22. To what extent do you agree or disagree with this statement: Our key audiences speak to others about us in a very positive light.

- Agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Disagree
- Don’t know/prefer not to answer

23. How frequently does your organization receive positive media coverage (local or national)?

Multiple times an hour	Hourly	Daily	Weekly	Monthly	Yearly	Don't know/ Prefer not to answer

24. How frequently does your organization receive negative media coverage (local or national)?

Multiple times an hour	Hourly	Daily	Weekly	Monthly	Yearly	Don't know/ Prefer not to answer

25. Compared to five years ago, has your organization raised more or raised less funds?

- Raised more funds
- Raised less funds
- Has stayed the same
- Don’t know/prefer not to answer

26. Compared to five years ago, do you have more or less staff on your team?

- Have more staff
- Have less staff
- Been consistent
- Don’t know/prefer not to answer

27. Compared to five years ago, do you have more or less volunteers supporting your organization?

- Have more volunteers
- Have less volunteers
- Been consistent
- Don’t know/prefer not to answer

28. How much does your organization raise in annual donations? (Used to determine size.)

- Less than $100,000
- In between $100,000 and $1 million
- Over $1 million
- Don’t know/prefer not to answer

29. In what province or territory does your organization have its main head office?

- Alberta
- British Columbia
- Newfoundland and Labrador
- Nova Scotia
- Northwest Territories
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon