Designing the Donor Experience – A Case Study, Aalto University in Finland

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Laurea University of Applied Sciences

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Laurea University of Applied Sciences **Abstract**

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Over the past few decades, the role and importance of donations and philanthropic giving has increased world-wide. This trend applies to the Finnish higher education sector as well. Moreover, private individuals are becoming increasingly relevant as donors and active in their giving. Thus, there is a growing demand for better understanding of the major individual donors and their motivations and decision-making criteria in giving, and also, need for analyzing their expectations and experiences as donors.

The primary purpose of this thesis was to investigate how to enhance the engagement and donor experience of major individual donors in the higher education sector. Aalto University serves as the subject of the case study for this purpose. The aim of the thesis was to identify characteristics of major individual donors, and their reasons for donating to the university. In addition, the aim was to analyze the existing donor experience, and recognize the key elements contributing to a positive donor experience.

The knowledge base and theoretical framework of the thesis consist of four components: theories of motivation, the concept of donor inspiration, decision-making theories, and attributes of the donor experience. In this research-oriented thesis and development project, the service design approach and the Double Diamond framework (Design Council 2019) was used. In practice, several qualitative methods such as research wall, mind-map, semi-structured interviews, donor behavior archetypes, donor journeys, and experience blueprints were utilized and created in the process.

As a result, six critical aspects in a positive major donor experience were discovered. These cover various important elements such as communication, engagement methods and processes, reporting, and transparency, which are essential for maintaining strong relationships with major donors. In addition, several motives were identified that influence major donors' prosocial behavior and willingness to donate to the case university. These include the personal connection, history, bond, and trust for the institution; the university’s mission, strategy, and values; the overall importance of education and research; gratitude for one’s own education, the opportunity to give back, and the culture of giving. Furthermore, personal benefits such as tax deductions and access to interesting discussions and new knowledge, as well as systematic and transparent communication and reporting, also play a role in their willingness to donate. Moreover, based on the insights and learnings gathered, four donor behavior archetypes for major individual donors were identified and created: the engaged insider, the mission-driven donor, the strategic benefactor, and the obliged donor.

Given the recent developments in the university sector and the scarcity of financial resources, it is increasingly important to understand how to remain relevant in donors’ minds and to grow and strengthen the donor base and donations for the future. This thesis’ insights and concrete tools will hopefully enhance the quality of relationships with major donors and support the effectiveness of fundraising efforts in the Finnish higher education sector and especially in the case university.

Keywords: donor experience, higher education, individual donors, major fundraising, service design

Laurea-ammattikorkeakoulu **Tiivistelmä**

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Viimeisten vuosikymmenten aikana lahjoittamisen ja lahjoitusten merkitys ovat kasvaneet maailmanlaajuisesti. Tämä kehityssuuntaus näkyy myös Suomessa ja Suomen yliopistosektorilla. Yksityishenkilöiden aktiivisuus sekä merkityksellisyys lahjoittajina ovat myös vahvistuneet. Tarve yksityishenkilöiden ja heidän lahjoitusmotiiviensa ja päätöksenteko-kriteeriensä ymmärtämiselle on kasvanut, samoin kuin tarve analysoida ja tunnistaa heidän odotuksiaan ja kokemuksiaan lahjoittajina.

Tämän opinnäytetyön ensisijaisena tarkoituksena oli selvittää, kuinka parantaa suurten yksityishenkilölahjoittajien sitoutumista ja lahjoittajakokemusta yliopistosektorilla. Aalto-yliopisto toimi tässä tarkoituksessa tapausesimerkkinä ja tutkimuksen kohteena. Opinnäytetyön tavoitteena oli tunnistaa erityisesti suuryksityishenkilölahjoittajien ominaispiirteitä sekä heidän motiivejaan yliopistolle lahjoittamisessa, analysoida nykyistä lahjoittajakokemusta ja tunnistaa keskeisiä elementtejä, jotka edistävät positiivista lahjoittajakokemusta.

Opinnäytteen tietopohja ja teoreettinen viitekehys koostuvat neljästä osasta: motivaatioteorioista, lahjoittajainspiraation käsitteestä, päätöksentekoteorioista sekä lahjoittajakokemuksen piirteistä. Opinnäyte oli tapaustutkimus ja kehitysprojekti, joka perustui palvelumuotoilun viitekehykseen ja Double Diamond -malliin (Design Council 2019). Prosessissa käytettiin useita laadullisia menetelmiä, kuten tutkimusseinää, ajatuskarttaa, teemahaastatteluja, lahjoittajakäyttäytymisen arkkityyppejä, lahjoittajapolkuja ja lahjoittajakokemuksen aikajanaa.

Tuloksena löydettiin kuusi kriittistä osa-aluetta, jotka vaikuttavat positiiviseen lahjoittajakokemukseen. Nämä tekijät kattavat useita tärkeitä elementtejä, jotka ovat olennaisia kestävien suhteiden ylläpitämiseksi suurlahjoittajien kanssa, kuten viestintä, sitouttamismenetelmät ja -prosessit, raportointi ja läpinäkyvyys. Lisäksi pystyttiin tunnistamaan useita motiiveja, jotka vaikuttavat suurlahjoittajien käyttäytymiseen ja lahjoittamishaluun. Näitä olivat: henkilökohtainen yhteys ja luottamus instituutioon; yliopiston missio, strategia ja arvot; koulutuksen ja tutkimuksen tärkeys yleisesti; lahjoittamiskulttuuri, kiitollisuus omasta koulutuksesta ja mahdollisuus antaa takaisin; henkilökohtaiset hyödyt, kuten verovähennykset ja pääsy kiinnostaviin keskusteluihin ja uuteen tietoon; sekä systemaattinen ja läpinäkyvä viestintä ja raportointi. Tämän lisäksi kerättyjen tietojen ja oppien perusteella tunnistettiin ja luotiin suurlahjoittajille neljä lahjoittajakäyttäytymisen arkkityyppiä: sitoutunut sisäpiiriläinen, missiosta motivoitunut, strateginen hyväntekijä ja velvollisuudentuntoinen lahjoittaja-arkkityyppi.

Yliopistosektorin viimeaikainen kehitys ja taloudellisten resurssien niukkeneminen huomioon ottaen on yhä tärkeämpää ymmärtää, kuinka pysyä merkityksellisenä lahjoittajien mielessä sekä kasvattaa lahjoitusten ja lahjoittajien määrää tulevaisuutta varten. Tämän opinnäytetyön oivallukset ja konkreettiset työkalut tukevat toivottavasti suurlahjoittajasuhteiden kehityksessä ja tukevat osaltaan varainhankinnan tuloksellisuutta Suomen korkeakoulusektorilla sekä erityisesti Aalto-yliopistossa.

Avainsanat: korkeakoulusektori, lahjoittajakokemus, yksityislahjoittaja, varainhankinta, palvelumuotoilu

Contents

1 Introduction and context for the thesis

Over the past few decades, the role and importance of donations and philanthropy has increased world-wide. This trend can be seen both in charity and higher education sectors' donations. The Charities Aid Foundation's (CAF) World Giving Index tracks annually the global trends in generosity – whether it being money, time, or other kind of help. The CAF's World Giving Index report from year 2023 state that a stunning amount, 4.2 billion people donated money, gave time, or helped someone they didn't know in 2022. That makes it 72 % of the world's adult population. If we look at the index covering the donation data only, it shows that the *donated money* percentage has increased from 29 percent to 34 percent over the course of ten years. (Charities Aid Foundation, 2023, pp. 2, 6, 14)

In addition, the latest data from the U.S. university sector – with especially strong traditions and long roots in philanthropic giving and fundraising – tells us a similar kind of story. According to the Council for Advancement and Support of Education (CASE) *Insights on Voluntary Support of Education* report 2023, giving to U.S. higher education institutions has increased by 12.5 % in the fiscal year ending June 30, 2022. Total support rose from $52.90 billion (year 2021) to $59.50 billion in 2022. (Council for Advancement and Support of Education (CASE), 2023). There have also been headlines in newspapers, like *"The rise of the mega-donors. The median annual gift last year for America's 50 most generous donors was $97 million, according to the Chronicle of Philanthropy." (Cheney 2018).*

From the European university sector there are some interesting trends and shifts to be seen as well. Based on the recent CASE-More UK Philanthropy Report, the annual giving to UK universities has doubled over the past decade, reaching a record £1.5 billion in 2022. (CASE-MORE UK, 2023). Furthermore, in the Nordic countries, the public funding for universities from the government has traditionally been covering the majority of universities funding needs. However, the world around us has changed a lot in this aspect as well, and thus, this change has impacted the ways universities in Finland and in the Nordics operate and seek funding nowadays. I will look at these changes and power shifts in the Finnish higher education landscape more closely in the next chapters.

1.1 The Finnish higher education landscape and the role of giving

The Finnish universities, and the higher education sector overall, has gone through many transformations in the past fifteen years. The biggest change took place in 2010 when the Finnish university legislation and system changed quite significantly. In this nation-wide university reform, which came into effect on January 1st, 2010, Finnish universities were detached from the state organization and became independent legal entities, either in the form of public law universities or foundation universities. The Universities Act increased the independence of universities, and there were also several university mergers done at the same time, or soon after. (Salminen 2024, 29-31; Annual Report 2009-2010, 7; Universities Act 2009.) The number of universities in Finland has decreased from eighteen universities in 2009 to thirteen universities in 2024 (Opetusministeriö 2009, 12).

At the same time with the university reform, the Finnish Ministry of Education and Culture (MEC) steered universities toward active fundraising and seeking donations from the private sector between 2008 - 2011. It is notable that the Ministry did not only gently nudge the universities to fundraising, but it also set a significant incentive for universities' fundraising and promised to match received donations[1] with 2.5 times matching. In other words, 1 euro donation weighed 3.5 euros with the government's matching. (Opetusministeriö 2011.) Furthermore, there were also some changes made to the Finnish taxation, and donations to universities came tax-deductible for both private individuals and organizations. The same tax-deduction criteria apply also today. For individuals the donations are tax-deductible from 850 euros to 500 000 euros per calendar year, and for organizations the tax-deductions are applicable from 850 euros to 250 000 euros per calendar year. (Tax Administration, Deductions for a donation.)

These above-mentioned government's substantial incentives for donations activated the whole Finnish university sector. All universities started their fundraising operations and campaigns simultaneously, even though one could claim that probably none of the universities were quite ready and equipped for fundraising nor the campaigns. Since then, there has been two other government's matched-funding schemes and campaigns for Finnish universities, and one also for the Finnish Universities of Applied Sciences. After the 1st matching campaign period, which ended in June 2011, the total amount of state's funding allocated to the basic capital of the universities was altogether stunning €733.6 million. This result was achieved with strong support from industry, foundations, private individuals, public organizations, and the substantial and record-breaking 2.5 times matching by the government. With this special capitalization of universities done in 2011, the financial strength and independent operational capabilities of universities were reinforced. (Opetusministeriö 2011.)

The second matching campaign for universities started in 2014 and ended in June 2017. This time the state capitalized all Finnish universities with matching funding of €150 million in

[1] The donations needed to meet certain criteria and conditions to qualify for the government's matching funds. For instance, donations could only be directed to the university in general or to a specific field of education if the donation amount was a minimum of 10,000 euros.

total. The third matching campaign for universities, which was funded by The Finnish Innovation Fund SITRA and ended in June 2022, capitalized the universities altogether with 67 million euros.[2] In these latest two matched-funding schemes all the donations, which met the MEC's matching criteria for donations, received a coefficient of roughly one-to-one. In other words, one euro donated to a Finnish university weighted two euros together with the government's matching. (Opetusministeriö 2022.)

However, even though these three government's matching campaigns have activated universities' fundraising operations and brought new funds and assets to the university sector, the Ministry of Education and Culture's overall funding value for Finnish universities has been declining during the last decade. I will look at the funding status and the case university more closely next in chapter 1.2.

1.2 The case university and the development project

Aalto University, a foundation-based university, was founded and started operating in January 2010 when three esteemed, existing universities – the Helsinki School of Economics, Helsinki University of Technology, and University of Art and Design Helsinki – merged into one university. (Annual Report 2010, 7. Universities Act 2009.) Since then, Aalto has focused on science, technology, business, arts, design, and architecture, offering a wide range of undergraduate, graduate, and doctoral programs. Aalto is especially known for its innovative approach to education and research, promoting cross- and multidisciplinary collaboration and entrepreneurial mindset to address and tackle complex societal challenges and in shaping a more sustainable future. (Tienari, Aula & Aarrevaara 2016.) In 2024, Aalto University consists of six schools with almost 14 000 students (FTE), and over 4 500 members of faculty and staff, of which 400 are professors. (Aalto University webpage)

The six Aalto schools are:

- School of Art, Design and Architecture,
- School of Business,
- School of Chemical Engineering,
- School of Electrical Engineering,
- School of Engineering, and
- School of Science.

[2] The Finnish Innovation Fund SITRA granted a one-off contribution of €100 million to universities. Of this, €67 million was allocated in proportion to donations collected by universities in accordance with the rules of the matched-funding scheme. The rest of the capitalization (€33 million) was based on indicators related to the impact of university research.

Aalto University has engaged in proactive fundraising in all three state-supported matching campaigns. In addition to these active fundraising campaign periods, donor relationships and fundraising practices have been more consistently developed since the second matching campaign 2015-2017.

In Aalto University's Fundraising Policy from 2021, it is stated that

> "*Aalto University seeks donations in order to support research, education, and artistic activities through long-term donor relations. The fundraising planning is a part of the Aalto University's overall strategy, and a part of the University's annual planning cycle. It includes overall long-term financial goals for fundraising. Financial goals are set on a multi-year basis, with annual follow-up and adjustments in connection with the university dialogues.*"
> (Fundraising Policy 2021, 4.)

Within Aalto, the donor can direct the support to many different targets and either capitalized (endowed) or expendable funds. For instance, one can support the university in general, some of its schools or research fields, Aalto University Junior, quantum technology, or international student exchange. (Aalto University Donor Engagement webpage.)

As stated in the Chapter 1.1, the importance of donations has increased in the Finnish higher education sector in recent years. The same trend applies to the case university as well. For instance, if we look at the inflation-adjusted government funding from the Ministry of Education and Culture (MEC) for Aalto University (the red bars in the Figure 1), we can see that the government funding has decreased by over 30 percent in a decade, from 2011 to 2023. (Aalto University 2023.)

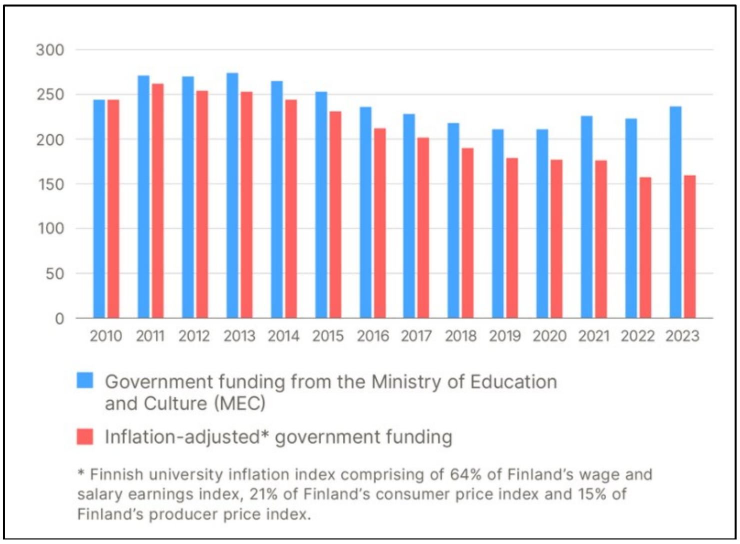


Figure 1: Government's funding for Aalto University, 2010-2023. (Source Aalto University)

Hence, the role of external funding and donations has grown significantly. In 2024, Aalto University foundation's endowment provides already 41 million euros to university's operations, which is approximately 9 percent of the total operation budget of the university. This funding alleviates the decline in the public funding. (Aalto University news website.) In addition to these previously stated structural changes in universities' funding, I also claim, that there are some alterations and signals visible that the overall culture of giving in the Finnish university sector is changing and evolving too. I will provide a more detailed basis for my argument in the following paragraphs.

Foundations remain the primary contributors and main donors of universities in terms of donated euros, and companies and public organizations constitute the second largest donor segment economically. However, it is noteworthy that in terms of euros, the third group of donors, *private individuals*, are also becoming increasingly relevant and active in giving as well. Both Aalto University's own data and the formal and informal information received from other Finnish universities support this claim. (Aalto University 2023a, 32.) For instance, *University of Helsinki* reports in 2023 that there are over 800 individuals and organization representatives already part of their donor community - *Club Giraffe* – where all the members have donated to the University of Helsinki minimum 1,000 euros. (University of Helsinki 2023, 5). In recent years, there have also been several public announcements of million-euro donations from private individuals to Finnish universities.

See the headlines of these donation news in the next figures;

- Figure 2,
- Figure 3, and Figure 4.

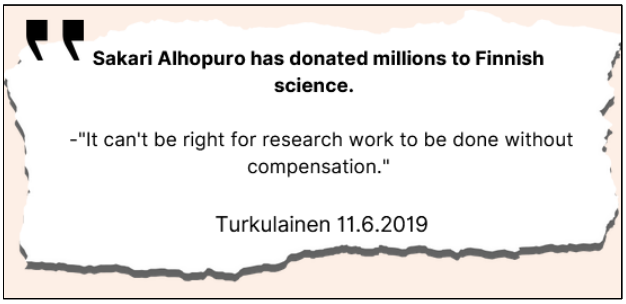
Figure 2: LUT University receives €5 million donation. LUT University News 5.2.2024.

Jyväskylä University received a historic million-euro donation from a local entrepreneur.

The university received a four-million-euro donation from software entrepreneur Matti Hälli."

IS Taloussanomat 1.4.2021

Figure 3: Jyväskylä University received a €4 million donation. IS Taloussanomat 1.4.2021



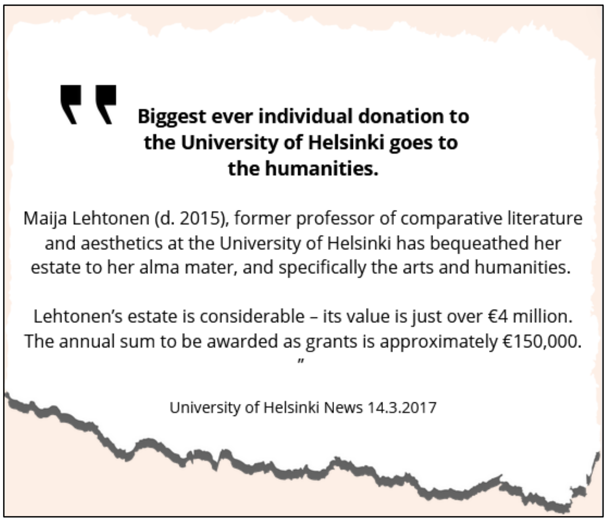
Sakari Alhopuro has donated millions to Finnish science.

-"It can't be right for research work to be done without compensation."

Turkulainen 11.6.2019

Figure 4: Sakari Alhopuro has donated millions to Finnish science. Turkulainen 11.6.2019.

When talking about the major individual donors and major gifts, one should not forget the role of legacies (bequests) and legacy giving. Bequests can have a lasting impact on the beneficiaries and organizations involved. Through legacy giving, individuals also have the opportunity to become significant individual donors, potentially making a substantial contribution to causes they care about. (Polivy 2013, 11.) As an example of this, University of Helsinki received one exceptionally large legacy gift, €4 million from their emerita professor Maija Lehtonen in 2017. See Figure 5.



Biggest ever individual donation to the University of Helsinki goes to the humanities.

Maija Lehtonen (d. 2015), former professor of comparative literature and aesthetics at the University of Helsinki has bequeathed her estate to her alma mater, and specifically the arts and humanities.

Lehtonen's estate is considerable – its value is just over €4 million. The annual sum to be awarded as grants is approximately €150,000. "

University of Helsinki News 14.3.2017

Figure 5: Four-million-euro legacy gift published. University of Helsinki News 14.3.2017.

However, in this thesis work the focus will not be on legacy giving and bequests, but major individual donors and their interests in general. When looking at these previously described trends in higher education both in Finland and globally, I argue that there is a growing demand for better understanding of the major individual donors and their motivations in giving and need for analyzing more in depth their expectations and experiences as donors. Worth, Pandey, Pandey & Qadummi (2020) have studied this phenomenon in their qualitative research work and described their findings in the article *Understanding Motivations of Mega-Gift Donors to Higher Education: A Qualitative Study*. Similarly, Worth et al. stress that there has been changes in the patters of giving to higher education recently in U.S. They have noted that large gifts account an increasing percentage of the total in giving. Hence, the researchers assert that given this change, it has become more crucial to comprehend the incentives, motivations, and decision-making attributes (Gregory, Ngo & Miller 2020) of individuals who contribute significant donations, often referred to as "mega gifts." (Worth et al. 2020, 281-282.)

Another example highlighting this need for better understanding and relevance at an organizational level is showcased in AbouAssi's and Tschirhart's (2018) interesting research study on predicting behavior in donor networks. The research aimed to identify organizational responses to these evolving and growing funding demands by gaining a deeper understanding of donor networks and the organization's position and relations within them. Their *Strategic Response Model* – four-field model with High and Low Resource Dependence dimensions, and High and Low Ties dimensions – assists nonprofit organizations (NPOs) in positioning themselves within various donor networks and potentially uncovering unexplored potential and funding opportunities and also identifying their vulnerabilities. For instance, the researchers highlight that NPOs in robust, tightly-knit networks may perceive the importance of both cultivating weaker connections (i.e. conducting adjustment) and also fortifying existing strong ones (e.g. strengthening loyalty). These examples demonstrate the ways in which an NPO can enhance its standing within a donor network, such as by serving as a partner that offers distinctive and highly valued resources to the donor and other network members. (AbouAssi & Tschirhart 2018, 126-128, 135.) See the Figure 6 for further reference and details of the strategic response model.

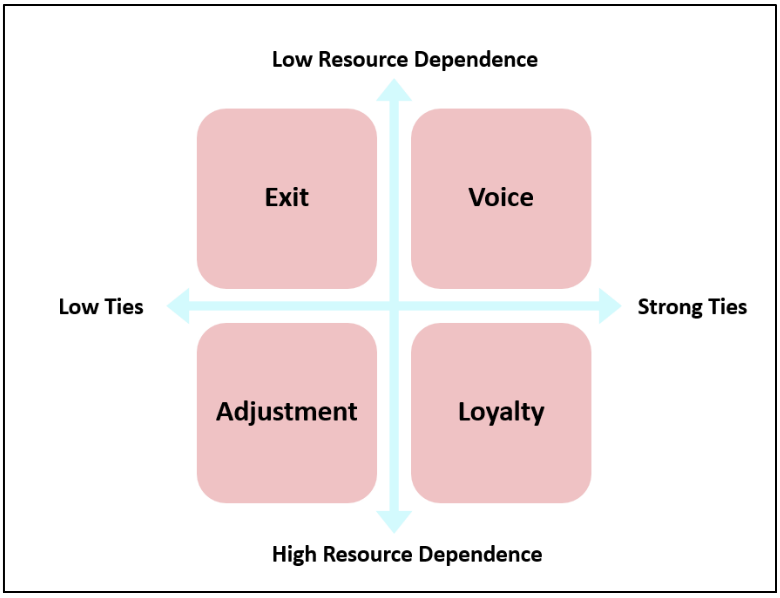


Figure 6: Strategic Resource Model's dimensions by AbouAssi & Tschirhart (2018)

These recent research cases and topics serve as evidence of the need for a better understanding of donor behavior, the primary motivational factors for donors and their main decision-making criteria. Consequently, the purpose and objectives of this thesis and development project, along with the research questions at hand, will be described in the following section, Chapter 1.3, building upon the previously described need and relevance.

1.3 The purpose, aim, and structure of the thesis

The central theme of this thesis work is to develop major donor engagement strategies and processes in a Finnish university context. Specifically, it focuses on major individual donors and creates a deeper understanding of donors' motivations and expectations for the university's donor relations. This understanding will be used to improve donor engagement and fundraising processes, and hopefully, design donor journeys that even better align with donors' key motives and their anticipations for donor relations. Hence, the primary *purpose* of this thesis work is to investigate how to enhance the engagement and donor experience of major individual donors in the higher education sector. Aalto University serves as the case study for this purpose.

The overarching *aim* of this thesis can be outlined in two aspects:

1. Firstly, the aim is to identify characteristics of major individual donors, and their reasons for donating to the university.
2. Secondly, to analyze the existing donor experience, and recognize the key elements contributing to a positive donor experience.

The three main research questions in this thesis study are:

- **Research Question 1:** What are the characteristics of major individual donors contributing to the university?
- **Research Question 2:** What motivates the individual donors to give and donate to the university?
- **Research Question 3:** What strategies and tools can facilitate the development of donor journeys that are tailored to major individual donors, and what are the critical factors that contribute to a positive donor experience?

Ultimately, the goal of this thesis work is to design and find solutions and suggestions for implementation of more fit and satisfying donor journeys for major individual donors at Aalto University. By doing so, this work attempts to improve fundraising capabilities and processes, foster deeper relationships with donors and generate stronger support for higher education and academic research. Therefore, the thesis work is a research-oriented development case study (Ojasalo, Moilanen and Ritalahti 2014, 18). This thesis should not only benefit Aalto University, but also, hopefully contribute valuable insights to the broader field of donor relation management and major donor fundraising in the university sector especially in Finland and in the Nordics.

<u>The structure of the thesis consists of the following parts:</u>
The first part of this thesis work (chapter 1) serves as an introductory overview of the topic and the landscape of higher education fundraising (chapter 1.1). Chapter 1.2 provides a more detailed description of the development project and the case university, and in the chapter 1.3 the purpose, aim, and research questions are introduced. In the chapter 1.4 the key concepts of this study are described more thoroughly.

The knowledge base is presented and described in chapter 2. The most relevant *motivational theories* concerning the thesis topic are introduced and evaluated in chapter 2.1. Also, the *donor inspiration* concept and theory described and studied recently by Hesse & Boenigk

(2023) is reviewed in chapter 2.2. *Decision-making* processes are defined in chapter 2.3, and lastly, *attributes of donor experience* are explained in chapter 2.4.

In chapters 3 and 4, the aim is to address the research questions and find solutions by employing a range of research methods and service design tools. The chapter 3 describes the thesis and development process in more detail and illustrates the methods in use. The chapter 4 presents the results received from the thesis work's research and service design process. To conclude, the chapter 5 discusses the conclusions, learnings, and limitations of the particular development project and this thesis work and outlines and sets forth the identified needs for further research.

<u>The nature of the thesis</u>

This thesis work is qualitative by nature. Thus, this thesis aims to identify the characteristics of major donors and understand their motivations to give, and expectations for good donor experience. Like in qualitative research in general, the aim of this thesis is not to produce statistically relevant information or generalizations as such. Qualitative research and its methods overall see the world as subjective, rather than objective one. In other words, there is no pure objectivity, but the environment and context in which the qualitative research happens impacts the results of the research. (Creswell & Poth 2017, 7.)

Hence, it is important to keep in mind also in this thesis work that the empirical findings and new insights are based on small group of private individual donors in a certain context and time. The fact that in qualitative research the researcher takes part in the actual research process, for instance as an interviewer, also increases the need for transparency and a detailed description of the research process. In this way, the transferability and the trustworthiness of the results can be evaluated and critically examined by the reader. Nevertheless, one can find many beneficial factors and elements through qualitative research approach. Qualitative research provides readers with a more authentic and contextual representation of a specific aspect of life, which in many situations may hold greater significance than purely quantitative approaches focused solely on numbers and quantified data. (Dodgson 2017; Creswell 2014, 185.)

Furthermore, this thesis work is deeply rooted in a behavioral science approach and worldview. Primarily, it is the result of my personal academic study background in the fields of education, psychology, and sociology. These disciplines have provided me with a comprehensive understanding and strong interest in human behavior and social interaction dynamics, shaping the foundation for the theoretical framework and methodology employed and utilized in this study.

1.4 The main concepts and terminology

There are a variety of concepts and detailed terminology in use for describing universities' philanthropic activities and donor relations, and those concepts are often used alternately and interchangeably. The most important concepts of this thesis work are described in more detail next.

Philanthropy / Donating

In overall, the term philanthropy can be used to describe generosity, voluntary efforts to help unknown others, and desire to do good (Breeze 2021, 23). Robert Payton and Michael Moody (2008, 62-63) highlight that philanthropy seems to appear in some form in all cultures and civilizations throughout the history. That there seems to be something inherent in the world, and in us human beings, that gives rise to philanthropy. Philanthropy is a reaction and response, when something has gone wrong, or something could be better. In the higher education sector philanthropy is often referred to and manifested especially through donations. (Dictionary.com)

Donor / Major donor

A donor may be a private individual, a foundation, a company, a public entity, or an association. In this thesis work, the focus and spotlight will be put especially on private individual donors, and more precisely, on major individual donors. Major individual donors are individuals who can make considerable personal donations and contributions to nonprofits (Sargeant & Shang 2017, 435). For this case study in hand, the major individual donors are considered to be those donors who have contributed to the university 10,000 euros or more.

Donation / Deed of donation / Pledge

Donations are defined as a free, gratuitous contribution to support a university or a cause without direct economic benefit in return to the donor. In this aspect, donations differ, for instance, from sponsorships where the sponsor gets visibility and other tangible goods in return. The case university welcomes donations both for university-wide and school-specific targets, as well as multidisciplinary targets or other purposes. Before making the donation, the major donor and the university sign a deed of donation document, where the purpose, amount, payment schedule, and other terms and conditions (for instance, the publicity) of the donation is defined in detail. The deed of donation document can be seen as a tool for ensuring that everyone involved knows their rights and also the limitations regarding the donation given. Thus, I would argue that the document supports ethical fundraising practices and solicitation processes as well. Smaller donations are accepted online without a deed of donation. A donation is called a pledge (a promised donation) until the donation is paid. (Fundraising Policy 2021, 8; Principles in Fundraising; Pettey 2008.)

Donor engagement /Donor relations /Cultivation / Stewardship

Donor relations, cultivation, and stewardship refer to the process of building and maintaining relationships with donors, cultivating their commitment to an organization, and recognizing their contributions (Enqvist et al. 2018, 20). In the fundraising landscape and terminology practice, donor stewardship term is primarily focusing on maintaining and nurturing existing donor relationships. In practice, stewardship is regular feedback and reporting how the gift has been used and the impact it has had, communication such as annual reports and newsletters, meetings, and invitations to events. Cultivation of the donor relations can be seen as growing the number of donors and the size of their gifts, but also "*increasing the opportunities for individuals to contribute to an organization or cause over their respective lifetimes*" (Polivy 2013, 6, 46-47.) While donor engagement is more about actively involving and engaging both existing and prospective donors in the organization's work. Nonetheless, all of these concepts and approaches are essential in building strong and sustainable relationships with donors. (Sargeant & Shang 2017, 459.)

Donor experience

See the chapter 2.4 for the concept of donor experience.

Fundraising / Fundraiser

Fundraising in general refers to the systematic process of acquiring donations or other kinds of financial support for a specific cause, organization, or project. It typically involves various solicitation methods and reaching out to individuals, foundations, corporations, or other entities to request their contribution and support. In practice, fundraising strategies include different kinds of processes and activities, like events, campaigns, meetings, and appeals designed to motivate and inspire individuals and organizations' decision makers to donate. Even though there are many established best practices for fundraising, Sargeant & Shang (2017, 173) emphasize that there are no "one correct" or "right way" of organizing and conducting fundraising operations - since non-profit organizations vary widely in size, structure, and available resources.

Endowed and expendable funds

Donations to different purposes may usually be targeted to either endowed or expendable funds. In the endowed funds, the principal amount of the fund is held in perpetuity, in other words, preserved over time by using only the real return of the donation to support a designated purpose or activity. The expendable funds are typically meant to be utilized within a specific time frame, and both the fund's assets and income are used. (Fundraising Policy & Fundraising Principles, Aalto University.)

Taxation and donations

Donations to universities are tax-deductible in Finland, like in many other countries as well. The donor can deduct from their earned income monetary donations totaling 850 euros or more during the calendar year. One can make the donation in several installments. The maximum tax-deductible donation amount is 500,000 euros for private individuals and 250,000 euros for companies and organizations per year. (Review for Donors 2023; Deductions for a donation, vero.fi)

Service Design

See the chapter 3 for future description of service design approach and methods.

2 Factors influencing donation behavior

In this chapter 2, I will introduce three primary theoretical perspectives and knowledge frameworks affecting donors' behavior, motives, and decisions: motivation theories (chapter 2.1), the concept of donor inspiration (chapter 2.2), and theories on decision-making and decision-making criteria (chapter 2.3). In the chapter 2.4, I will also clarify the concept and attributes of donor experience. Through these theoretical lenses and concepts, I will look at the elements that influence donors' choices and drive their actions and behavior in philanthropic giving.

2.1 Motivation to donate

"*Motivation is the study of why individuals or organisms behave as they do*" - what initiates their actions, and what fuels, maintains, and ultimately concludes their behavior (Graham & Weiner, 2012, 367). Or like McInerney (2019, 427) in other words state; motivation refers to the mechanism through which individuals and groups select specific behaviors and maintain consistent engagement with them. Motivation is an important element and driver in human life, and thus, motivation has been an interest and research topic for hundreds of years already.

Paul Main (2023) argues that as much as 70% of human behavior can be comprehended through the lens of motivational theories. This statistic highlights the significant impact of motivation on behavior, covering everything from basic actions to complex choices and social engagements. In addition, McInerney emphasizes the importance of recognizing the cultural aspects and local constructs that affect motivation (McInerney, 2019, 428). Indeed, there are dozens of different motivation theories in the world.

Probably the most known and cited theory on motivation is the Maslow's need hierarchy and theory on motivation, which origins already from the 1940's and 1950's. Abraham Maslow claimed that there is a hierarchy and pyramid of needs which guides human behavior and directs the motivation. Maslow argues that the lower-level needs have to be fulfilled and met first before a person can proceed to the next level of the hierarchy. The hierarchy's bottom consists of lower-level basic needs: physiological needs, and safety needs. In the middle there are psychological needs: belonginess and love needs, and self-esteem needs. On the highest level of the hierarchy are the self-fulfillment needs: self-actualization - like creativity, morality, and problem solving. See the Figure 7 for further details.

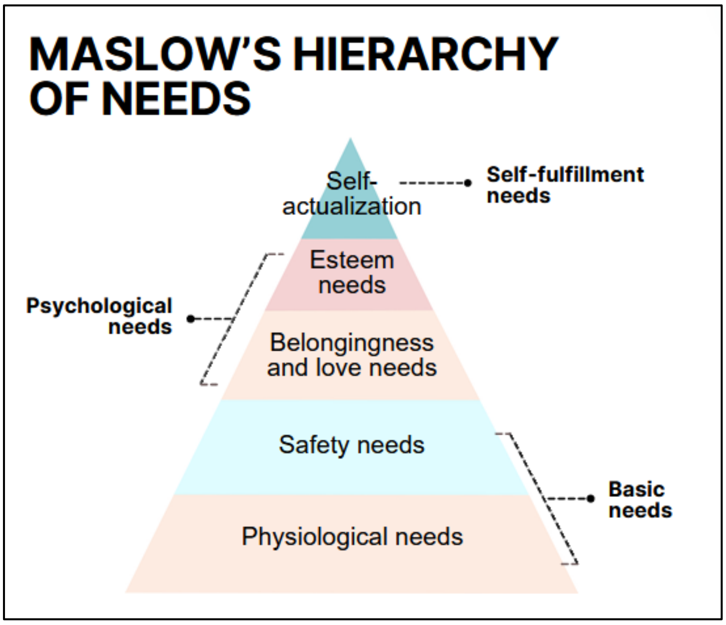


Figure 7: Maslow's hierarchy of needs adapted from Research Gate.

However, Maslow's view on the hierarchy and analogy of needs has been challenged by various research and different scholars since. Nowadays, it is rather seen that not all lower-level needs have to be met before one can be motivated towards also the higher-level needs. For instance, see Chen[3], and Wahba & Bridwell[4].

[3] Chen, C. P. (2017). Revisiting Maslow's hierarchy of needs: Towards a socio-ecological approach. Review of General Psychology, 21(4), 331- 343.

Motivational theories can be divided into content theories (*what motivates*) and process theories (*how motivation influences*). Maslow's theory is one of the content theories. Another example of a content theory is the Achievement Motivation Theory, also known as the Three Needs Theory, which was developed by psychologist David McClelland. This theory enhances our comprehension of motivation by introducing an additional dimension, illustrating how our inherent desires for *achievement*, *affiliation*, and *power* influence our actions. (Acquah, Nsiah, Antie & Otoo 2021, 26-27.)

On the other hand, process theories put the main focus on the procedure and journey itself. Victor Vrooms', and Lyman Porter's and Edward Lawler's Expectancy theories originating from the 1960's are one of the most well-known process theories. Vroom's theory begins with the notion that individuals generally have preferences for specific goals or outcomes. As a result, they anticipate a sense of satisfaction when achieving these favored outcomes. (Miner 2005, 97.) In the Figure 8 the basic elements and logic of the expectancy theories – Expectancy (effort), Instrumentality (performance), and Valence (reward) are shown (Main 2023).

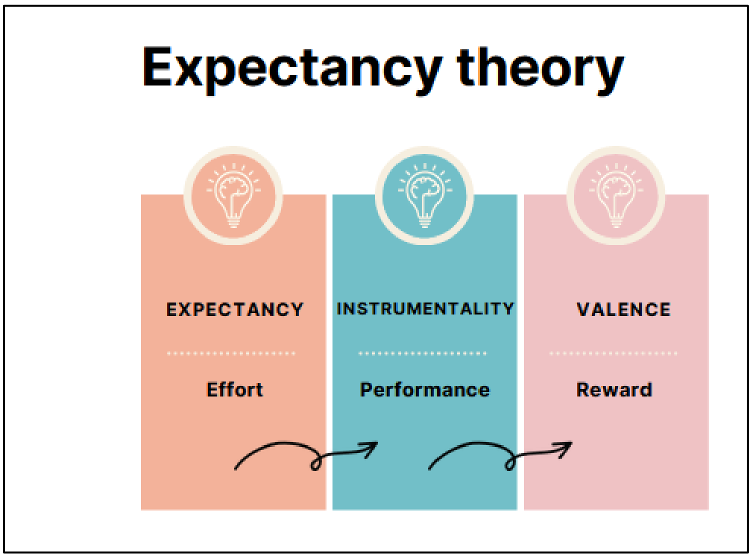


Figure 8: Expectancy theory drawn from Main (2023).

Porter and Lawler based their expectancy theories on Vroom's work, but added some elements and dimensions to it, for instance, what are the personal traits required in the

[4] Wahba, M. A., & Bridwell, L. G. (2010). Maslow reconsidered: A review of research on the need hierarchy theory. Organizational Behavior and Human Decision Processes, 50(2), 212-240.

process, and what is the perceived effort-reward probability for the individual? (Miner 2005, 98-99.)[5]

Another way to approach motivation is to view it from the *intrinsic* and *extrinsic* factors affecting motivation. Psychologists Edward Deci and Richard Ryan developed The Self-Determination Theory (SDT), which is a widely cited and further-developed process theory. SDT theory puts special focus on both the internal and external factors influencing motivation.

Furthermore, the SDT theory proposes that individuals are motivated and driven by three fundamental psychological needs:

- *Autonomy*, which involves the desire to have control over one's own life.
- *Competence*, which entails the need to master tasks and acquire various skills.
- *Relatedness*, which encompasses the desire to interact with, connect to, and care for others.

Self-determination theory (SDT) asserts that satisfying these needs is essential for optimal functioning, personal growth, and overall well-being. In addition, SDT delves deeper into the concept by examining how social conditions and interactions can either facilitate or hinder intrinsic motivation. (Deci & Ryan 2012, 416-417, 432-433.) See the Figure 9.

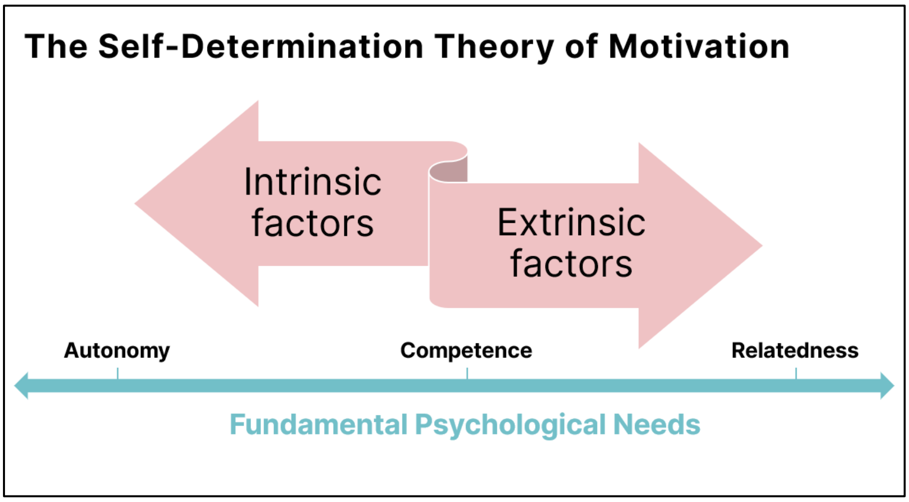


Figure 9: The Self-Determination Theory of Motivation modified from Deci and Ryan (2012).

In fact, I argue that the SDT model offers valid and interesting theoretical framework for this particular thesis and development work, because the SDT contains the fascinating interplay

[5] For further details, see: Vroom, Victor, Lyman Porter, and Edward Lawler. "Expectancy theories." Organizational Behavior 1. Routledge, 2015. 94-113.

between the internal and external motivational factors. I claim that in philanthropic giving these factors and dimensions are always present. Earlier studies (Johnson & Ellis 2011, 4-5) have also shown that intrinsic and extrinsic motivations usually co-exist and work hand in hand instead of being at odds with one another. Nevertheless, the researchers Jennifer W. Johnson and Bret Ellis (2011) emphasize in their work that motivation can differ broadly across donors and creating general theories on donors' motivation is somewhat challenging task. Nonetheless, like Breeze, Lafferty, and Wiepking in their book (2023, 4.1) state: for fundraisers, understanding *why people give* is highly relevant and crucial for building beneficial and long-term relationships with donors.

In a more detailed way, scholars Sara Konrath and Femida Handy (2018) have studied donors' motives in giving (the charitable sector in the U.S.)[6]. In their research, Konrath and Handy draw a thorough and theoretically driven, quantitative measurement of motivations for donating. The final list of different factors that emerged from their research were the following six motives to give: *Altruism, Egoism, Tax, Constraints, Trust, Social, Guilt,* and *Self-Esteem.* Interestingly, the authors also divide these six motivational factors into two different categories, Public Benefits (other-oriented motives), and Private Benefits (self-oriented motives). See Figure 10: Motives in giving drawn from Konrath & Handy (2018, 349). (Konrath & Handy 2018, 437-438, 457.)

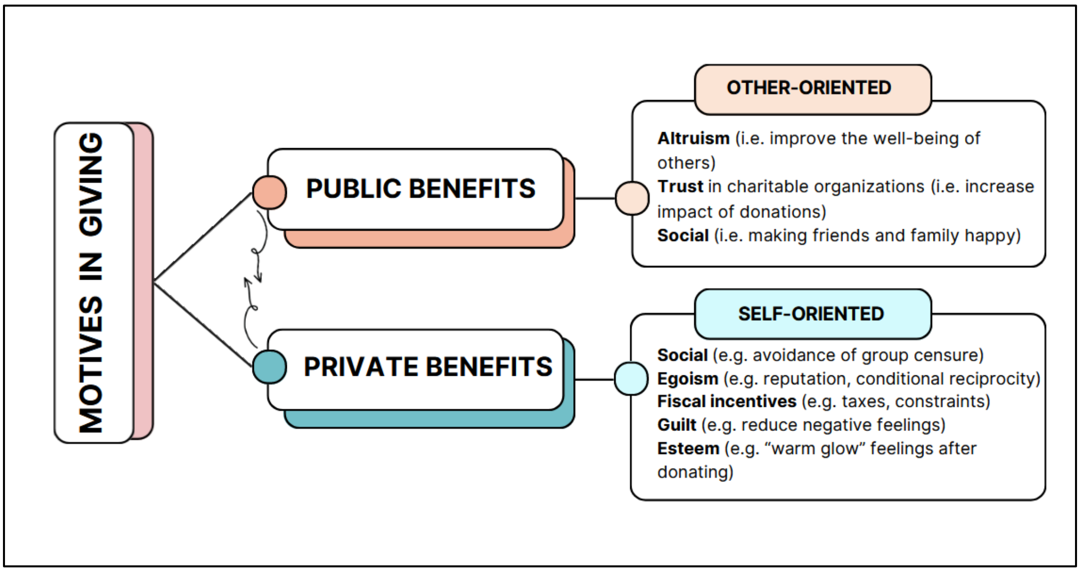


Figure 10: Motives in giving drawn from Konrath & Handy (2018, 349).

[6] For the reference, ~70% of the donations given to charitable organizations in the U.S come from private individuals (Konrath & Handy 2018, 347).

To elaborate this topic further, Worth et al. (2020) have done a relevant qualitative study of the motivations of mega-gift donors (i.e., major donations from individual donors to higher education, from $50 million). For the analysis, the researchers used the data received from *Chronicle of Higher Education* and public news media documents. Based on these documents, donor biographies were generated for each mega-gift donor in their sample and primary motivations and secondary motivations for all gifts were identified. Significant importance was put especially on the direct quotations from the donor regarding their motivations in giving, as well as direct quotes from institutional officials that described the motivations of the particular donor.

The main key motives Worth et al. identified were the following four:

1. *Desire to have impact,*
2. *Exchange,*
3. *Altruism,* and
4. *Tradition/Legacy/Memorial*.

(Worth et al. 2020, 284-292.)

Researchers have also highlighted the role and complexity of people's memory when studying in retrospective donors' motives in giving. For instance, memory can become biased because the additional information and other events affect the original memory about the donation event, motives, and decision-making criteria. This *post-event information effect's* impact implies that for example the messaging an organization uses in obtaining a donation has the potential to direct and affect the donor's memory of their donation behavior and the underlying motivations behind it. Another psychological phenomenon affecting one's behavior is the *overjustification effect*, where receiving external rewards or benefits may cause individuals to believe that their behavior was driven by extrinsic motivations, even if their original motivation has been more intrinsic one. (Johnson & Ellis 2011, 6.)

Motivation theorists emphasize the fact that motivation is always a two-way process that is constantly evolving, with contextual factors and situative perspective playing a crucial role in it. Furthermore, theorists propose the existence of "hierarchies" of motivational beliefs rather than isolated and specific ones. (Wigfield & Koenka 2020, 1.; Koenka 2020, 5.) Hence, one should remember that donors may have multiple motivations that coexist concurrently and simultaneously (Breeze, Lafferty & Wiepking 2023, 4.1).

Bekkers and Wiepking conducted in their research study a comprehensive review of academic literature investigating charitable giving behavior and donor motivations. They were able to identify eight mechanisms that prompt people to make charitable donations. In essence, these mechanisms involve various processes that result and lead in a particular outcome, such as donations and charitable giving (Bekkers and Wiepking 2011, 927-943).

The authors (Breeze et al. 2023, 4.1) clustered the mechanisms in following four categories:

- the opportunity to give (e.g. awareness of the cause),
- values for giving (i.e. altruism, making the world a better place),
- costs and benefits in relation to giving (reputation, joy of giving), and
- efficacy motivations for giving (making a difference).

See the Figure 11 for further details.

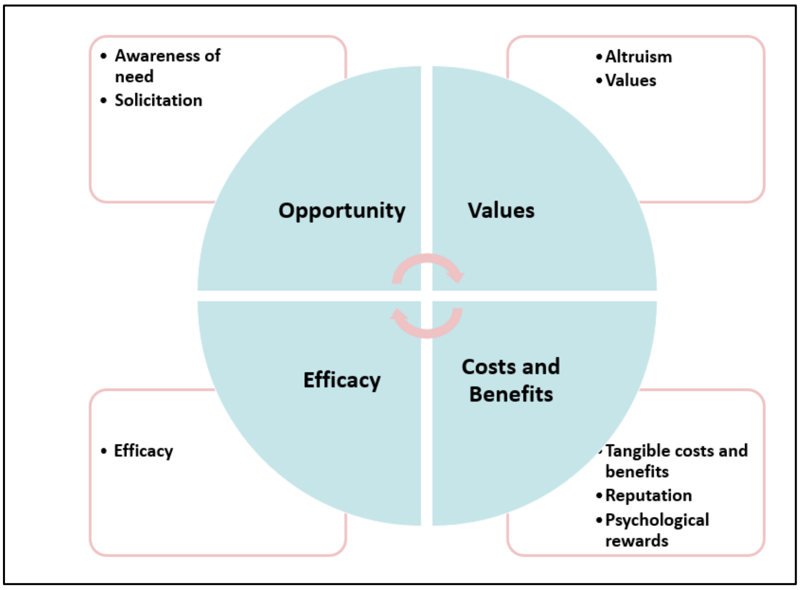


Figure 11: Eight mechanisms that drive charitable giving according to Bekkers & Wiepking 2011

Thus, I argue that motivation is always a multifaceted phenomenon in which both internal and external factors influence one another. There are rarely easy, linear, or comprehensive answers available for human behavior. In the next chapter, I will look closer to the concept of donor inspiration and its role in donors’ behavior and actions.

2.2 Inspiration to donate

A very topical study on fascinating and new concept - *donor inspiration concept* - was published by Laura Hesse and Silke Boenigk in 2023. The researchers studied the motivational theory of role modelling (Morgenroth, Ryan & Peters 2015) and the framework of a donor inspiration in a peer-to-peer giving and context. In general, the theory clarifies how individuals who are seen as role models within a relationship or network can influence and inspire others. Hesse's and Boenigk's framework state that individuals donate and get inspired by a source, which is most likely a peer fundraiser, a social project, or a nonprofit organization. In other words, donor inspiration serves as a driver of donation behavior whether it is an "inspired-by" (extrinsic source) or an "inspired-to" (intrinsic pursuit) form (Morgenroth et al. 2015, 475).

Hesse's and Boenigk's study also showed that peer fundraisers, the social cause, or a fusion of these factors can act as the source of donor inspiration. It is notable that in the study, the combination of these factors led to significantly higher donation amounts. (Hesse & Boenigk 2023, 241-244, 254.) Furthermore, Morgenroth et al. (2015) state that there are three different functions that role models serve.

Role models can be

1. *behavioral models,*
2. *representations of the possible, and*
3. *act as inspiration.*

(Morgenroth et al. 2015, 477.)

Naturally, the observations and outcomes of these studies are significant and relevant ones for advancement professionals and fundraisers in all nonprofit organizations. Especially in regard to the selection and implementation of fundraising strategies and the solicitation approaches in use.

Interestingly though, this role modelling and donor inspiration effect may not be a linear and straightforward process for all donors. There are also some contradictory results received from research regarding the donor inspiration and role models. Kristoffer Jackson's (2016) field experiment research focused on the effects of social information for lapsed donors[7] and got fascinating findings. The field experiment discovered that lapsed donors who received a solicitation letter citing a larger donation made by another donor (*high social information group*) tended to donate more generously, but remarkably, had a lower likelihood of giving a

[7] A lapsed donor is a donor who has contributed to an organization but who has not donated within a specified amount of time, in this case, in more than 3 years. (Jackson 2016, 922; Kindful.com)

donation overall, when compared to the baseline (*low social information group*). The study also determined that high social information caused a 4.1% decrease in the likelihood of a lapsed donor to donate. Hence, the impact of high social information needs to be considered carefully when targeting lapsed donors – “*because individuals who have not given recently may be systematically different from active donors*” and using the other donors’ as an inspiration might not work as planned. (Jackson 2016, 920, 923.)

It is noteworthy that earlier research indicates that there are special characteristics in the process of how charities should solicit and fundraise from high-capacity donors, also known as major donors. Alston, Eckel, Meer and Zhan (2018) discovered that major donors are not responsive to common, impersonal letters or e-mails, but they require and expect more personal communication and cultivation than small, lower-capacity donors. Thus, motivating high-income donors should be done with more personal approaches and particular solicitation methods.

When looking at the personal characteristics of a person who donates money and/or goods, Mainardes, Laurett, Degasperi, and Lasso (2015) highlight four main factor groups - demographic, socioeconomic, psychological, and behavioral - that favor donation. Their research also identified one new demographic element, ‘being healthy’. (Mainardes et al. 2016, 81-83.)

See further details about the factors favoring donations in the following Table 1.

FACTOR	**DEFINITIONS**
Demographic	Age, gender, education level, marital status, number of children, social class, religion, being healthy, etc.
Socioeconomic	Social justice, social reputation, social responsibility, financial security, home ownership, helping profession, etc.
Psychological	Altruism, personal satisfaction, empathy, ego, self-esteem, joy in donating, humor, guilt, pity, etc.
Behavioral	Self-image, desire to help, generosity, obligation, identification with the cause, public prestige, desire to make a difference, family tradition, donation history, leaving a legacy, etc.

Table 1: Personal characteristics that favor donations according to Mainardes et al. 2016

What then actually makes people donate? I will look closer at a few decision-making theories and concepts and clarify the complexity of human decision-making and behavior in the next chapter.

2.3 Decision to donate

Weinstein and Barden (2017) highlight in their book, The Complete Guide to Fundraising Management, the most used fundraising truth and guideline: "*People give to people to help people*". In other words, the decision to donate is always made by an individual or a group of people. In turn, the second part of this fundraising truth makes the *fundraiser's role* visible. There is always someone raising the funds and actively taking care of the relationship, and representing the purpose, institution, and cause at hand – to whom the donation is given and who it will benefit and help in the end. (Weinstein & Barden 2017, 1-2.)

Another everyday saying for fundraising professionals is that in the end *people make donation decisions with their heart, not with their rational mind*. In other words, the heart makes the decision and then the reasoning and rationale follows and gives sense and justification for the decision already made.

Classical decision-making theories were created in laboratory environment and regulated settings. However, real-life, naturalistic decision-making processes and events tend to differ remarkedly from the task for which classical decision theory was designed. Many biases, inconsistencies, and different personal traits affect human behavior and decision-making. (Klein, Orasanu, Calderwood & Zsambok 1993, 35-40.) Without digging too deep into the world of decision-making theories, I will draw next a bit theoretical basis for the *decision to donate* process and raise some earlier research and their findings in the spotlight.

When looking closer at the donor-specific decision-making processes, several interesting aspects and research results can be highlighted. Researchers Supphellen and Nelson (2001) studied a group of 90 consumers in Norway using a simple scenario-technique to investigate their cognitive and behavioral responses to donation requests (direct mail charity appeals). The researchers analyzed the responses qualitatively and *identified three different donor categories based on their decision-making styles*: analysts (ANA), relationists (REL), and internalists (INT).

- <u>ANA donors</u> evaluated and analyzed both the requesting organization, and the specific cause promoted, indicating high involvement, and made thorough evaluations before making the decision to donate.
- <u>REL donors</u> were loyal to specific organizations and paid little attention to other information beyond the requesting organization.
- Interestingly, <u>INT donors</u> did not evaluate either the organization or the promoted cause. Instead, recognition of the requesting organization and the request to donate alone was sufficient for them to respond positively.

Thus, Supphellen and Nelson state that for the INT donors executional and operational indicators such as the familiar brand, design, and colors are important factors and may be sufficient reasons to motivate their donating and giving in overall. (Supphellen & Nelson 2001, 573-574, 591-592.)

Moreover, Anna Lee Morrison (2015) studied in her dissertation work donors' motivations and decision-making. Morrison used semi-structured interviews as the primary method for qualitative data collection and utilized content analysis to examine the data. The results uncovered significant findings in donors' motivations, the giving process, and the factors that influence their decision-making. The study suggests that donors in higher education already have a pre-existing inclination to give, consider the ability to establish trusting personal relationships crucial to giving, can be influenced by information provided by development officers[8], are more inclined to give when they can be personally involved, and are ultimately impacted by their emotional response to the entire process. (Morrison 2015, ii.)

Furthermore, also Gregory, Ngo, and Miller (2020) emphasize in their research that donors are different in their decision-making, however, *donor's involvement in a non-profit's cause* leads to more favorable attitudes toward the brand and greater likelihood to choose one charity brand over another. Brand salience (i.e., brand's prominence and distinctiveness), and especially the more enduring brand concept, *brand attitude* may support the decision-making process of a donor as well. (Gregory et al. 2020, 583-858, 594.) Additionally, Bekkers and Wiepking (2011) report that committed donors seem to be particularly influenced by getting financial information about donations and their impact (Bekkers & Wiepking 2011, 28).

Moreover, David A. King examined in his doctoral dissertation (2005) the decisions and decision-making processes of major donors in the Higher Education sector in the U.S. King emphasized in his work that despite the critical and vital importance of major donors for all types of higher education institutions in the U.S., there is still limited understanding of how these donors make decisions regarding their donations and donating in general.

King's major donor interviews (sixteen interviews) and qualitative analysis of the data showed the following three main decision-making criteria:

- *Mission affinity,* (i.e., goal alignment)
- *interpersonal relationships and leadership* (e.g., with chief development officers, deans, or the President)*, and*
- *modeling* (i.e., role-modeling).

Also, *self-interest, gratitude, honoring others,* and interestingly too, *the "no ask"* theme – in other words, not being asked for a donation from the institution – were seen themes of significance as well in King's analysis and dissertation work. The largest donations, the "lead

[8] Development officers = Donor engagement and fundraising professionals

gifts" from major individual donors were mostly directed to a specific campaign or intended to establish a new program, e.g. international programs, medical school, or honors college. (King 2005, iv-v, 102, 146-148.)

Previous research has also shown that identifiable individuals (i.e., specific donation targets) usually generate greater compassion and receive more donations than statistical, unidentified victims or donation targets. This phenomenon is known as the "identified effect". However, this behavior might be shaped by some cultural variations though. For instance, researchers Wang, Tang, and Wang (2015) found that Chinese respondents rated greater distress, sympathy, and willingness to contribute to a group of sick children rather than an individual child. In contrast, the U.S. participants' willingness to help and sympathy were higher for an identified victim compared to unidentified group of children. (Wang et al. 2015, 1-2.) These different findings highlight the significance of cultural differences in comprehending people's prosocial behavior. Donors and potential new donors should not be treated as a homogenous group (Gregory et al. 2020, 594).

What factors and mechanisms then affect and shape the donor experience? I will look into those effects more closely next in the chapter 2.4.

2.4 Attributes of donor experience

We live in the world of experience economy, and thus, experience design is needed in many different disciplines and for diverse purposes i.e., customer experience, user experience, and employee experience (Brown 2009, 110). Rossman and Duerden (2019, 10) define experience as a distinctive interaction that involves becoming aware of and interpreting experience elements. At the conclusion, the individual holds and retains personally perceived memories and results of the experience. Brown also highlights that experiences are more purposeful, deeper, and worthwhile than just simple services and entertainment. Experiences implicate active participation of the user/consumer/donor, not only passive consumption, or usage of the service. The author even suggests that we have shifted to an era of participatory design. (Brown 2009, 112, 115.)

Hence, donor experience can be described as the overall experience that individuals or organizations have when engaging with a nonprofit organization. The donor experience includes factors such as

- ease of donation,
- transparency and interaction in communication,
- thanking process,
- appreciation and recognition of contributions, and
- reporting back the impact and results of the support received.

The traditional and widely world-wide used major donor cultivation cycle and phases are the following ones: 1) identification and qualification, 2) cultivation and dialogue, 3) solicitation and the ask, 4) agreement and deed of donation, and lastly, 5) recognition and stewardship, from where the new cultivation loop and cycle should start again when applicable (Fundraising 101). The major donor cultivation process and cycle is illustrated in the Figure 12.

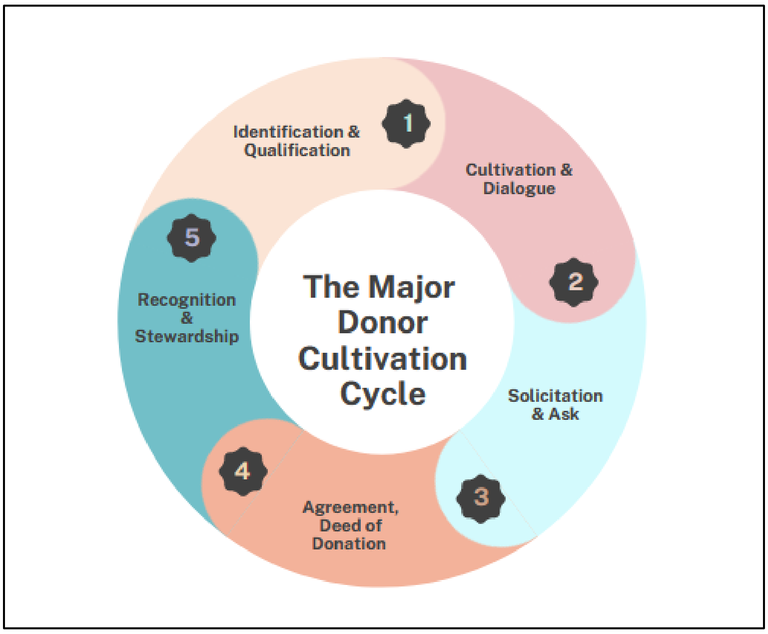


Figure 12: The Major Donor Cultivation Cycle modified from Fundraising 101.

In practice though, this major donor cultivation and fundraising cycle may not always be fully realized nor obeyed. Sometimes donor discussions start directly from the solicitation phase and quickly move onto the details of the deed of donation and to the stewardship phase.

At its best, a positive donor experience is adaptive and responsive to donor’s needs, and cultivates a sense of trust, connection, and fulfillment for the donor, which in turn, encourages ongoing support and develops further engagement. However, donor experience is always socially constructed and dynamically cocreated together with the donor her/himself, and many elements and external factors may affect the donor experience in the end. In many ways, the experienced value for a donor is in the end co-created. Encouraging involvement, facilitating engagement, and having an active dialogue is important in order to establish mutual understanding and deeper connection. As already highlighted earlier in this thesis work, donors and their motives are diverse, and so are their expectations for good donor relations. Donors expect different things and approaches, and the donor relations and practices in the organization should be set to recognize these differences in their donors’ needs and preferences. (Polivy 2013, 45–46; Sargeant & Shang 2017, 407, 432.) I argue that this is especially important to bear in mind in major donor stewardship and processes.

Nonetheless, Rossman's and Duerden's (2019, 110) also remind the reader in their *Experience design* book that "*as welcome as co-creation is, you will also want to manage it*". In other words, it is essential to acknowledge and find the balance between welcoming co-creation and the need to be able to manage it. This underscores the importance of understanding and addressing the varied expectations and approaches of donors while also maintaining effective management of donor relations to achieve successful outcomes and lean and efficient operational processes.

3 Service design process and methods

This chapter outlines the methodological strategy and tools used in this thesis, providing a description and rationale for the chosen methods while showcasing their influence on the design process. Additionally, the chapter 3 presents the stages and steps of the concrete research and service design process.

First and foremost, this thesis work is *research-oriented development work* - due to its practical relevance in workspace, and for the major donor relations development. In other words, the work aims to improve donor journeys and strengthen the collaboration services and donor experience, and hopefully, generate new professional knowledge and knowhow as well. Furthermore, the thesis work is exploratory research and qualitative by nature, and it utilizes the characteristics of the following research and development approaches: case study, service design, and phenomenographic analysis. (Moilanen, Ojasalo & Ritalahti 2022; Stickdorn, Hormess, Lawrence, and Schneider 2018, 100.)

Along the lines of the research-based development work (Moilanen et al. 2022, chapter 2.2), this thesis process and development work included the following main phases:

1. Setting the development target and familiarizing with relevant data and theories
2. Defining the research goal and questions
3. Writing the knowledge base, and planning the methodological approach and methods
4. Acquiring the data with different methods and tools
5. Analyzing the qualitative data and evaluating the results and making conclusions.

The development work has elements of case study, especially for the particular reason that it aims to understand Aalto University's major donors' motives and expectations regarding good donor experience, and furthermore, generate suggestions for advancement based on this information. However, since the purpose of this workplace development project is also to create and practically develop the donor experience elements and draw new processes and boundary objects e.g., tangible donor journeys and donor behavior archetypes, the case study approach alone is insufficient one as the only approach for this work (Stickdorn et al. 2018, 41-43). Thus, also some phenomenographic research approach and especially service design methods and tools are used in the process.

Phenomenography is an empirical approach to discover and validate the qualitatively different ways in which individuals understand and experience aspects of the world around them. Hence, in phenomenographic reasoning, reality exists in the way an individual perceives and constructs it in her/his mind. (Hajar 2021, 1421-1422.) This perception and construct of the reality and experience in donor's mind is one of the key interests in this thesis work. The service design approach and methods are described more solidly next.

Service design utilizes different design tools and multidisciplinary methodologies to develop services, processes, and experiences and puts especially focus on the user and user's experience (Foglieni, Villari & Maffei 2018, 34). Hence, service design is a human-centered and versatile approach to development, and it is applicable at any stage and for different levels of an organization throughout organization's or services' life cycle. Moreover, service design - and the *design thinking process* overall - are strongly empathetic, collaborative, iterative, and integrative perspectives, and mindsets by nature. (Moilanen et al. 2022, chapter 5; Tschimmel 2022, 4.)

Service design also emphasizes the co-creation and sociotechnical context of value and the importance of experience-centric services. These approaches are utmost relevant ones for this development task and thesis work in hand. Furthermore, Andreassen et al. highlight that service design can be viewed as an antecedent of service quality on the grounds that service design plays such a crucial role in creating experiences and encounters that are based on thorough understanding of the user. (Andreassen et al. 2016, 22-23.) In service design, the information is analyzed and synthesized to create insights, which are then visualized to provide easily accessible representations of various service situations (Segelström 2013, i-ii).

According to Stickdorn et al. (2018), service design can be viewed as a mindset, a process, a toolset, a cross-disciplinary language, or even as a management approach. In practice, the service design approach consists of dozens of different tools and practical development and ideation methods to utilize.

For instance,

- co-creative workshops,
- stakeholder and value network maps,
- user/customer personas,
- journey maps,
- prototypes of service processes and experiences,
- service blueprints, and
- business model canvas.

Nonetheless, all the service design models should focus on the understanding of user needs, work iteratively, and shift between convergent and divergent steps and thinking. (Stickdorn 2018, 83.)

One of the most widely known and acknowledged service design processes and approach is the Double Diamond model where the divergent and convergent thinking and phases alternate (Design Council 2019). The Double Diamond framework and process was also used in this thesis and development work. The Double Diamond framework and the schedule of this thesis work are described more concretely in the following Figure 13.

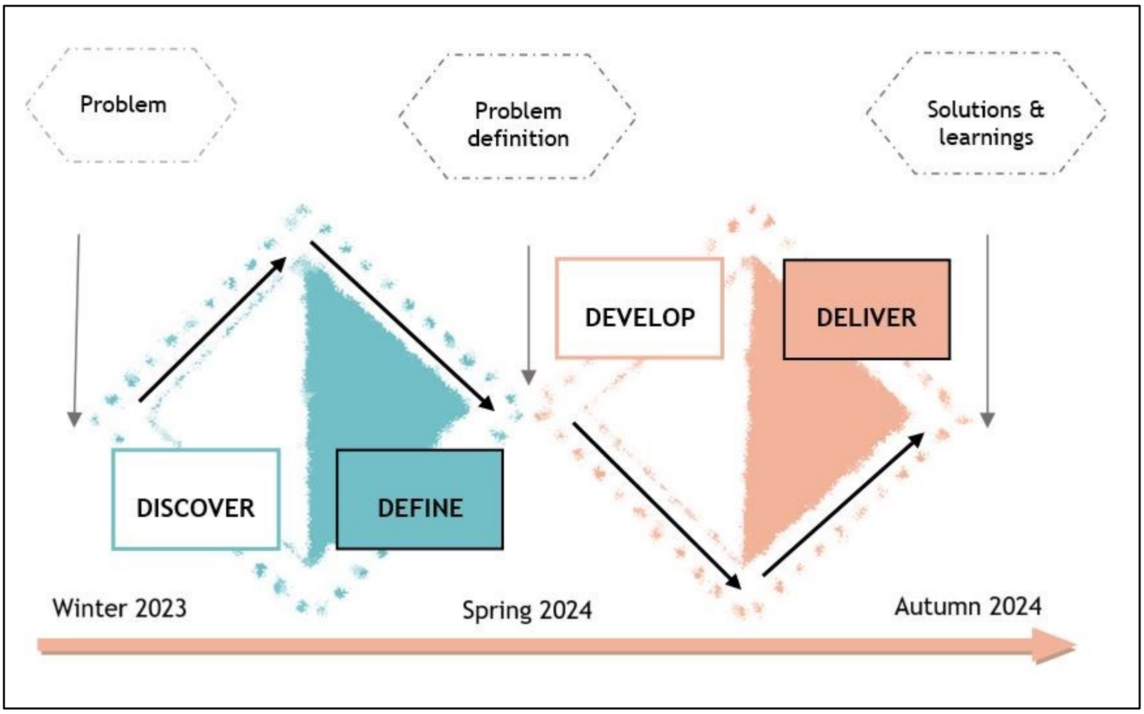


Figure 13: The Double Diamond model adapted from Design Council 2019

To clarify, the discover and define phases were active in winter 2023 and early spring 2024. The develop phase and deliver phases were conducted then during the spring, summer, and early autumn 2024. The Double Diamond model's concrete phases and practical steps in this thesis work are portrayed and defined more tangibly and thoroughly next in the Table 2.

DISCOVER PHASE	DEFINE PHASE	DEVELOP PHASE	DELIVER PHASE
Analyzing earlier survey data (N=266 answers), identifying the research scope and key questions.	Clarifying the problem, development task and interview themes. Getting comments from Aalto University's representatives and colleagues.	Conducting 7 major donor interviews and analyzing and categorizing the interview data on a research wall.	Solution a: Creating donor behavior archetypes.
Doing desk research, reading research journals, and benchmarking the field.	Forming the knowledge base and theoretical framework.	Formulating insights and recognizing patterns from the interview data.	Solution b: Developing and drawing donor journey maps.
Recognizing and mapping important concepts and theories.	Selecting and contacting the interviewees.	Identifying the key development areas in donor services.	Solution c: Writing an experience blueprint.

Table 2: The Double Diamond process and phases adapted from Design Council 2019

3.1 Discover phase

The discover phase of this development and thesis work consisted of three main parts. In winter 2023, I first conducted some initial desk research, benchmarked philanthropic giving both in Finland and globally, and explored a few previous studies on donors' motives and experiences in giving. The desk research served as a legitimate starting and learning point for this thesis process, and as a means to avoid duplicating previous efforts and to benefit from existing knowledge before embarking on the actual research process. (Stickdorn et al. 2018b.)

Secondly, I analyzed the feedback and data collected from donor surveys conducted at Aalto University in 2021 and 2022. I coded and categorized the open-ended question responses, and then, identified from the survey feedback the most interesting areas to investigate more in-depth in this development work. Thirdly, I started recognizing key theoretical frameworks and essential concepts and sorted and labeled them first to an affinity diagram, and later on, mapped them and their relations to a mind-map. See the key theoretical concepts mapped in Figure 14.

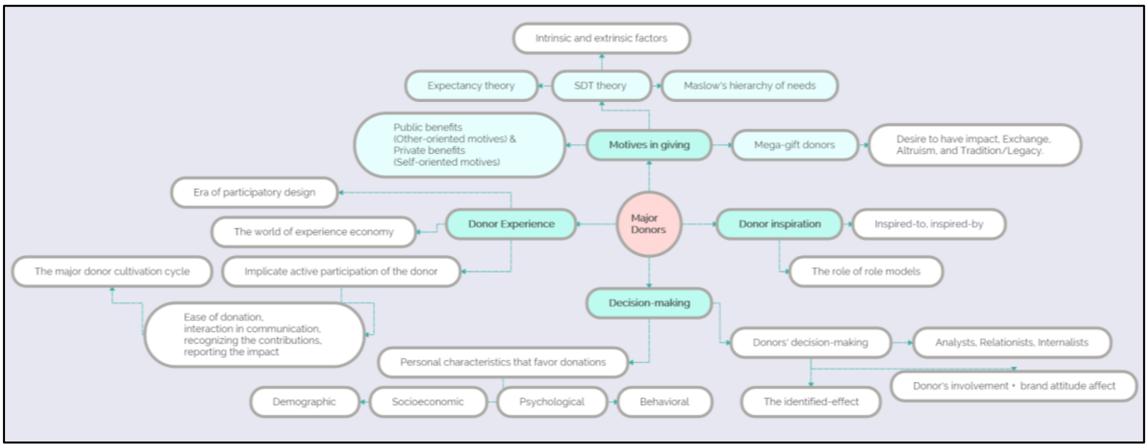


Figure 14: The key theoretical concepts and their relations drawn to a mind-map.

This Figure 14 mind-map is shown in bigger size also in the Appendices section. From this concept mind-map I was then able to draft the first versions of the purpose and aim for this development work. Preliminary research questions were drawn and written at this point as well.

Analyzing the donor survey responses

Aalto University has conducted donor surveys over the course of the past few years. The first donor survey took place in summer 2021. The surveys were aimed at gathering numerical data and information and feedback systematically from donors who had contributed and donated to Aalto University's different donation targets and funds over the years. The surveys collected responses from both individual donors and organizational donors, and from both major and minor donors. The purpose of these donor surveys has been to gain better understanding of the experiences and perspectives of the donors, and then use that information to improve Aalto University's fundraising strategies and develop the collaboration and communication with the donors. (Aalto University Donor Surveys.)

The data received through these concise online donor surveys has been primarily quantitative in nature. In other words, the surveys contained questions that required respondents to provide numerical or multiple-choice responses for easier quantification and analysis. However, the surveys also included some open-ended questions that allowed respondents to provide more detailed feedback with their own words and thoughts. These donors' open-ended question responses and comments (N = 266) were then analyzed and categorized further as part of the Discover phase of this study. The qualitative data obtained from these responses to open-ended questions provided additional insights into donors' perspectives and experiences and raised suggestions for further development.

To analyze these open-ended questions from the survey, I first copied the answers and comments (N = 266) onto an Excel sheet. This allowed me easy organization, sorting and categorization of the data. To further categorization of the responses, I generated several columns which noted some general remarks from the answers.

1. This column included the tone of voice - such as whether the response was positive, neutral, or negative.
2. The second column was for overall development remarks, which included comments on how the organization could improve or grow.
3. The third column I added was to capture the willingness of respondents to donate again in the future.
4. Finally, the fourth column was used to capture any specific blames or criticism from the survey respondents.

After these four columns were established, I created different content categories throughout the data analysis process. These categories I named and gave headlines based on the content of the responses.

The categories identified from the open-question data were the following ones:

- Aalto University,
- schools or study fields,
- the role as a donor,
- the size of Aalto,
- the role of alumni,
- Otaniemi campus,
- students,
- research, and
- learnings from others.

By categorizing the responses this way, it was easier to identify common themes and patterns in the data. See an example about the data analysis and part of the categorizations in Excel in Figure 15.

Survey data: Answers to "Kiitä, kehu, moiti ja anna rakentavaa palautetta" question														
		Yleisiä huomioita				Kategoriat								TEEMAT
Ye	The answer	sävy	lahjoitushalukkuus	kehitystoive, kommentti	moite	Aalto-yliopisto	Koulut/alat	Rooli lahjoittajana, lahjoittajasuh	Org. suuruus	Alumnius	Kampus	Ottakaa oppia muilta	Opiskelijat	Tutkimus
2021	Aalto ja AYY ovat toimineet erinomaisesti odotukseni huomioon ottaen	pos		x		x								
2021	Aalto menee hyvään suuntaan, onnittelut!	pos		x		x								
2021	Aalto on aivan loistava korkeakoulu, josta valmistuu työelämään erinomaisin eväin.	pos		x		x								
2021	Aalto on kiinnostunut vain hankkeista, joihin liittyy teknologiaa. Muuhun he eivät edes pyydä varoja.	neut		x	x									
2021	Aalto on minun mielestä menossa hyvään suuntaan. Tavoite pitää olla korkealla. Ei ole mitään erityistä syytä, miksi Aalto ei voisi olla joku päivä yksi maailman top 10 yliopisto tekniikankin alalla. Ja vaikkei olisikaan, niin tärkeää on pysyä vähintään kärjen tuntumassa.	pos		x		x								
2021	Aalto tekee minusta aivan mahtavaa työtä monella yhteiskunnan, tutkimuksen ja opetuksen saralla loistavaa kampusta unohtamatta.	pos		x		x					x			x
2021	Aalto yliopisto kehittynyt mukavasti, ei saa kuitenkaan olla liian itsetietoinen. Yhteistyö ja yhteistyö verkot tärkeitä	pos		x		x								
2021	Aalto yliopiston perustaminen oli oikea ratkaisu.	pos		x		x								
2021	Aalto-yliopisto on löytänyt menestysstrategiansa ja -polkunsa. Pysykää sillä pohdiskelemalla uusia mahdollisuuksia ja ottamalla huomioon niihin aina liittyvät riskit!	pos		x		x								

Figure 15: Data analysis and categorization of the survey responses

In the next phase and second round of the analysis process I then found out and created more general level themes. These categorized results and thematical insights of the whole donor survey analysis are described more thoroughly in chapter 4.1.

3.2 Define phase

The define phase formed especially of the clarification the thesis' problem and development task and the research's purpose and aim. Furthermore, I defined the semi-structured interviews' main themes and questions from the learnings and insights gathered from the discover process.

I also requested and received some comments and views from Aalto University's representatives and colleagues regarding these main themes and the overall purpose and aim of this development and thesis work. The research questions were moderated and defined based on these comments and aspects.

DISCOVER PHASE	DEFINE PHASE	DEVELOP PHASE	DELIVER PHASE
Analyzing earlier survey data (N=266 answers), identifying the research scope and key questions.	Clarifying the problem, development task and interview themes. Getting comments from Aalto University's representatives and colleagues.	Conducting 7 major donor interviews and analyzing and categorizing the interview data on a research wall.	Solution a: Creating donor behavior archetypes.
Doing desk research, reading research journals, and benchmarking the field.	Forming the knowledge base and theoretical framework.	Formulating insights and recognizing patterns from the interview data.	Solution b: Developing and drawing donor journey maps.
Recognizing and mapping important concepts and theories.	Selecting and contacting the chosen interviewees.	Identifying the key development areas in donor services.	Solution c: Writing an experience blueprint.

Table 3: The Define phase, The Double Diamond process and phases adapted from Design Council 2019

Moreover, part of the define phase I gathered the knowledge base and theoretical framework for the thesis and wrote the knowledge base's content (see the chapter 2). Thereafter, I researched the major individual donor database and contacted individual donors with various backgrounds for the interviews and booked interview slots with these donors.

Based on the knowledge framework described in the chapter 2, and the key themes identified both from the earlier donor survey responses and driven from the research questions, the main themes and categories in the interviews were the following ones:

- 1) background information and donor history,
- 2) the key motives and interests in giving,
- 3) the experienced donor relations, and
- 4) the development areas and learning needs.

<u>The interview themes, guiding questions and discussion topics are listed below:</u>

Background information and the donor history:

- How would you describe your connection with Aalto University?
- Can you share a bit about your history and experience with philanthropic giving in general?
- Can you share the story behind your initial decision to donate to Aalto University?
- How would you describe the evolution of your relationship with the University over time?

The key motives in giving:

- What are the reasons or values that have motivated you to support Aalto?
- Are there some specific fields or areas at Aalto that you feel especially strongly about supporting?
- Were there any specific experiences or moments that especially inspired you to support the Aalto?
- How do you see other donors' role in your giving?
- What kind of impact do you hope that your donations to Aalto have?

The perceived donor relations:

- Tell me about your best experience with Aalto.
- How has Aalto handled the thanking and acknowledgement of your donation(s)?
- Are there any particular initiatives or programs at Aalto that have deepened your sense of connection as a donor?
- What ways and channels of communication do you personally prefer?
- What kind of recognition would you appreciate of receiving as a donor?
- In your opinion, what factors and elements contribute to a positive donor experience?
- How would you like to participate and get involved in Aalto's everyday operations and festivities?
- Trust is needed in philanthropic giving. What increases your trust to an organization?
- What expectations do you now have for Aalto?
- Could you describe the best customer experience that you have ever had? (Whether it has been in a hotel, restaurant, shop, or in university or charity sector.) What characteristics and elements that experience had?

Development areas and learning needs:

- Is there anything we could do to improve our ways in donor relations in terms of engaging and involving donors?
- Is there someone we could learn from?
- Is there anything we could change to improve our donor relations?
- Is there anything else you would like to add?

The interview questions in Finnish are listed in Appendix 1 (Appendices).

3.3 Develop phase

The develop phase of the double diamond process took the development project and the data gathering further. See the following Table 4 for additional information on the third part of the double diamond process.

DISCOVER PHASE	DEFINE PHASE	DEVELOP PHASE	DELIVER PHASE
Analyzing earlier survey data (N=266 answers), identifying the research scope and key questions.	Clarifying the problem, development task and interview themes. Getting comments from Aalto University's representatives and colleagues.	Conducting 7 major donor interviews and analyzing and categorizing the interview data on a research wall.	Solution a: Creating donor behavior archetypes.
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Recognizing and mapping important concepts and theories.	Selecting and contacting the chosen interviewees.	Identifying the key development areas in donor services.	Solution c: Writing an experience blueprint.

Table 4: The Develop phase, The Double Diamond process and phases adapted from Design Council 2019

As previously described, the personal, one-to-one semi-structured interviews with major individual donors serve as the primary and entirely new source of information and data set for this thesis and development work. Semi-structured interviews are a research method that involve a combination of predetermined questions and open-ended exploration, allowing for a deeper understanding of participants' perspectives, attitudes, and experiences (Interaction Design Foundation; Tuomi & Sarajärvi 2018, 87-88). In this work, seven (7) semi-structured interviews with major individual donors were conducted. The interviewees for these interviews were selected from the university's major individual donor base[9] as representatively as possible, i.e., donors from different generations, genders, and with

[9] Major individual donors = donors who have donated cumulatively 10 000 euros or more to Aalto University.

various backgrounds. The youngest interviewee has been born in the 1970’s, and the oldest one in the 1940’s. Some of them had donated to the university only once, over a decade ago. Some of them had given their first donation just recently, while others had made several significant donations over the course of years. The interviewees were living both in and outside of Finland; however, it is notable that they were all Finnish-speaking donors, and thus, the interview discussions were all held in Finnish.

The interviewees were promised that their identities would remain anonymous throughout this thesis process. Thus, the interview data has been handled solely by me and by using systems and equipment managed and owned by Aalto University. In addition, the privacy notice of Aalto University was applied to this thesis and communicated beforehand to the interviewees. As the interviewer, I am also the only one who knows the identities of the donors who were interviewed.

Since the interviewees shared a significant amount of personal information and history during the interviews, I have had to slightly alter some direct interview quotes from the donors to a more general level, in order to safeguard their anonymity. For the same reason, quotes from interviewed major donors could not be specified with individual identifiers or numbers in this thesis report. (See further info in results chapter, chapter 4.2)

The interviews were conducted either through in-person meetings or remotely via the MS Teams collaboration platform. The interviews lasted roughly an hour each (45~75 minutes). All the interview discussions were recorded, but I also took simultaneous handwritten notes during the interviews. After the interviews, I transcribed the discussions promptly into text format and carefully reviewed my notes to ensure that I didn't miss any important information or perspectives. I used MS Word’s Transcribe Tool for the transcription process. The tool performed quite well in transcribing the Finnish discussions into text format, although the transcript and comments needed a lot of correcting and polishing. In addition, already during the transcription process, I emphasized and color highlighted the main insights in the text format for easier coding and categorizing in the next phase.

Thereafter, I moved the main interview insights and comments regarding the research questions to a digital whiteboard (MS Whiteboard) and coded, grouped and mapped them into different categories and thematical sections in the research wall and affinity diagram.

See Figure 16 and Figure 17 as examples of these.

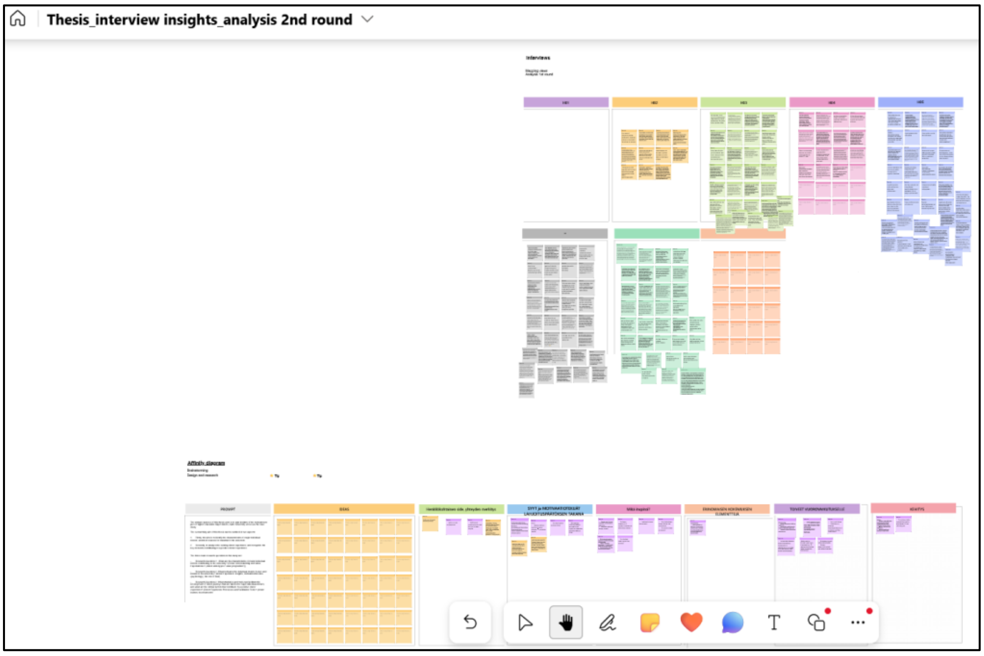


Figure 16: Interview insights, second round analysis

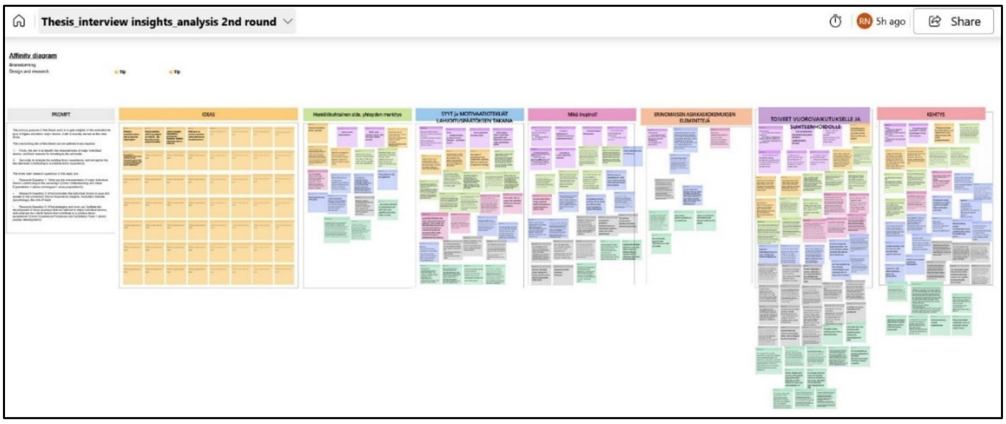


Figure 17: Interview categorizations and insight mapping

This way, I was able to make more sense of the comments and quotes derived from the raw transcript data, and it was easier to recognize the key development areas in donor services and donor experience design. After several interview analysis rounds and conceptualizations, I moved to the last phase of the research and service design process. Those steps and service design tools are described more thoroughly in the next chapter (Deliver phase 3.4). The actual interview quotes and insights and results derived from them are presented then in chapter 4.2. However, as already mentioned, in order to protect the interviewees' anonymity, I opted not to assign numeric labels to the quotes in this thesis report. This decision aimed to prevent the potential identification of individual donors based on combined information that could reveal their identities. Because during the interviews donors disclosed extensive personal information about their backgrounds and the causes they care about.

3.4 Deliver phase

The deliver phase of the project concluded the overall design process and illustrated different solutions. It aimed at creating tangible and concrete tools, suggestions, and outcomes for service development and execution in this particular development case and thesis work. These concrete “boundary objects” – shared artifacts and models – will hopefully help people with different backgrounds, skills, and roles to communicate and collaborate better on a common task and develop the major donor experience and processes further (Stickdorn et al. 2018, 43). See Table 5.

DISCOVER PHASE	DEFINE PHASE	DEVELOP PHASE	DELIVER PHASE
Analyzing earlier survey data (N=266 answers), identifying the research scope and key questions.	Clarifying the problem, development task and interview themes. Getting comments from Aalto University’s representatives and colleagues.	Conducting 7 major donor interviews and analyzing and categorizing the interview data on a research wall.	Solution a: Creating donor behavior archetypes.
Doing desk research, reading research journals, and benchmarking the field.	Forming the knowledge base and theoretical framework.	Formulating insights and recognizing patterns from the interview data.	Solution b: Developing and drawing donor journey maps.
Recognizing and mapping important concepts and theories.	Selecting and contacting the chosen interviewees.	Identifying the key development areas in donor services.	Solution c: Writing an experience blueprint.

Table 5: The Deliver phase, The Double Diamond process and phases adapted from Design Council 2019

Based on the earlier phases of the service design journey and all the categorizations and identified development areas, I first created the major individual donors' donor behavior archetypes. The donor personas are archetypes of major individual donors' behavior, different needs, and expectations towards donor experience and engagement practices (Stickdorn et al. 2018, 41). The donor behavior archetypes are described more thoroughly in the results section, in chapter 4.4.

Earlier research, a dissertation work on major donor motivation and decision-making, conducted by Anna Lee Morrison in 2015 highlighted the importance of donor journey planning and the development of donor giving experience. According to Morrison's research, ultimately donors' motivation and decision-making are influenced by their emotional response to the overall fundraising and stewardship process and how it makes them feel. Having a personal connection with the university and its representatives was highly valued and it had an impact also on the gift size according to Morrison's research. In addition, the possibility to be involved and to feel that they are a part of the project or cause had great influence on donor decision-making. (Morrison 2015, 107, 109.)

Thus, in the next phase of the deliver part of the process, I concentrated on the donor journeys or supporter journeys (Sargeant and Shang 2017) and donor journey map development. Journey maps are a tool which is rooted in and centered on human experience. Journey maps not only include the stages of user/customer interaction with an organization or its representatives, but also clarify all the crucial phases of an experience. Journey mapping assists in identifying gaps in customer or other experiences and in exploring possible solutions. Journey maps are also capable of visualizing both current experiences and potential future experiences – in other words, making the intangible experiences and services more tangible ones and facilitating common understanding among different parties and service providers. (Stickdorn et al. 2018, 43–46; Stickdorn et al. 2018b.)

Lastly, I concluded the process and drew a high-level experience blueprint for describing the main elements of a positive major donor relationship and processes. Experience blueprint and its insights can act as a compass and help an organization to make decisions and progress, without becoming overwhelmed or getting lost in too many details. In practice, experience blueprint can be located somewhere between customer journey and more detailed service blueprint or business process maps. (Banegas 2023.) By drawing an experience blueprint I aim to create a framework consisting of inspirational examples and main characteristics to show what a great major donor experience culture might look and feel like. In essence, blueprints can provide a framework for working out the details of human interaction with also the emotive elements. As Tim Brown describes in his book, the blueprint can serve as both a high-level strategy document and a detailed analysis of the critical aspects. (Brown 2009, 122, 126-128.)

4 Donors' motives in giving

In this chapter 4, the results from the different phases of the thesis work and service design process are reported. Also, the concrete design outcomes and artefacts are presented here in more concrete.

First, in the chapter 4.1, the discover phase's insights from the donor survey responses analysis are described. Then, chapter 4.2 presents the results of major donor interviews, detailing the motives and expectations of individual donors through actual interview quotes. In the chapter 4.3 the development points in donor experience are identified and illustrated more concretely in the table of critical factors for a positive major donor experience. Finally, the chapter 4.4 presents this thesis work's tangible service design process' outcomes, including four distinct donor behavior archetypes, donor journey map, and experience blueprint.

4.1 Insights from the donor survey responses

As described and outlined in the Discover phase section (chapter 3.1), the initial analysis and Discover phase involved the open-question responses from Aalto University's donor surveys, from which I derived first insights. My aim was to find some comments and aspects regarding the donors' experiences in giving. I have explained the whole analysis process more concretely in chapter 3.1.

The main open-ended question in the donor surveys was the following: "*Thank, praise, criticize, and provide constructive feedback to us*" (In Finnish: 'Kiitä, kehu, moiti ja anna rakentavaa palautetta'). As outlined already previously, multiple rounds of analysis were conducted on the survey responses to identify broader themes. These themes were based on the previously established content categories and included both emotion-driven themes such as pride and gratitude, and content-oriented themes such as communication and learning.

The Pride theme brought together and encompassed comments and responses from donors who expressed a sense of pride in being part of the Aalto community or being able to support the work done at Aalto University. This included feelings of accomplishment and satisfaction in making a difference. Note, that the survey quotes have been translated from Finnish to English by me, the thesis author.

> *"The establishment of Aalto University has been a great act that strengthens Finland. It has been a pleasure to support it!"* (Donor survey response)

Gratitude theme, on the other hand, captured respondents' appreciation for the organization and the work it had been doing. Many respondents expressed thanks for the organization's mission and the impact it was having on the community and in the society at large – but they also directly thanked the organization for their donor relations, or the thanking process of the donations in particular.

> *"It's been great to be a part of building Aalto into an even better institution."* (Donor survey response)

> *"I appreciate Aalto's long-term approach to keeping in touch with alumni and donors."* (Donor survey response)

Furthermore, I also observed that expressions of gratitude played a significant role, particularly in feedback received from donors who emphasized their background at Aalto university or one of its predecessors, thereby indicating their membership in the alumni community.

The Communication theme was derived from the feedback provided by respondents regarding the organization's communication and collaboration with its donors. This included remarks on the clarity and frequency of communication, along with some suggestions for improvements.

> *"Active communication of Aalto University activities, its achievements, and unique people is essential in building a relationship with the alumni and donors."* (Donor survey response)

Moreover, the Learning and the Need for improvement themes captured feedback on how the organization could improve and grow. Respondents provided a variety of suggestions for ways the organization could better serve its donors and/or achieve its goals. By identifying and creating more general level themes based on the analyzed and categorized survey data, I see that it was possible to gain a deeper understanding of the feedback and perspectives of the donors in general.

<u>The main findings from the surveys</u>

In overall, the feedback and the comments received from the donors were overwhelmingly positive in nature, with 198 out of 266 comments (74%) expressing favorable views. In addition, 58 out of the 266 comments (22%) provided by donors were neutral in nature. Out of the 266 comments provided by the donors, only 10 of them (less than 4%) expressed an unsatisfied tone and negative views, indicating that the vast majority of the feedback received in the surveys was positive or neutral in nature.

The criticism received from the recipients focused on the following three issues:

- Perceived rigidity and slow movement within the university's functions,
- The need for further improvement in alumni and donor engagement relationship management, and
- The desire for a more active use of the Swedish language throughout the university's education and research.

On the other hand, the main higher-level themes that were shown both in the positive and in the neutral comments from the donors were the following ones:

- Pride
- Gratitude
- Greetings and cheering for Aalto
- Possibility to make an impact
- Communication and relationship management, and
- Learning, education, and research.

4.2 Major individual donors’ motives and expectations in giving

As described in the chapter 3.3, the Develop part of this thesis project is built on personal, one-to-one donor interviews. These seven (7) major individual donors’ interviews took place in May and June 2024. The donors who were interviewed had various personal and educational backgrounds and represented different gender and age groups, with the youngest individual being born in the 1970’s. The content analysis phase of the interviews revealed several themes and brought to light various aspects and inspirations behind major donors’ motivation for giving large donations. These themes and expectations are listed, with some examples, in the Table 6 and described then more thoroughly together with some concrete interview quotes. See also chapter 3.3 for further details of the process.

Additionally, the reader should note that these interview quotes have been translated from Finnish to English by me with the help of Aalto AI Assistant tool. As highlighted earlier, during the interviews, the donors shared a significant amount of personal information and details about their backgrounds and the causes they have supported. To ensure the anonymity of the interviewees, I chose not to label or separate the quotes by number in this thesis report. This decision was made to prevent the potential identification of individual donors based on combined information that could then potentially reveal their personality.

Personal Connection, Bond, and Trust	University's Mission and Values	The importance of Education and Research	Gratitude, Giving back, and Culture of Giving	Personal Benefit	Transparency, Systematic Communication, and Reporting back
- Alma Mater, own school / department	- Multi-disciplinarity	- Strengthening the knowledge-base	- One's own education - Possibility to give back	- Tax deductions, Government's matching schemes	- Continuous dialogue
- Personal relationships and donation targets	- Shaping a sustainable future	- Universities need for extra funding	- Own earlier experience on giving - Obligation to give	- Access to interesting knowledge and network	- Reporting on the use of donation funds

Table 6: Main themes in major donors' motives and needs in giving

<u>The role of personal connection, bond, and trust</u>

When analyzing the interview data, it became evident that one of the most common reasons motivating major donors to give to Aalto University is their personal history and bond with the university and the university community's representatives. This is often evident through the donors' status as Aalto University alumni, reflecting their own study background and degrees from Aalto or its predecessor universities.

> *"Yes. Aalto is my home university. I've done my Master of Science in Technology degree here. One of my children is also studying at Aalto."* (Major donor interview)

> *"My spouse is from Kauppis (the Aalto School of Business), and also most of our closest friends are from this community."* (Major donor interview)

> *"Tuta (The Department of Industrial Engineering and Management) is really dear to me, we have this large group of friends who are still connected, despite several decades having passed since our study times."* (Major donor interview)

On the other hand, personal connection and bond can have other roots and origins as well.

> *"Even though Aalto isn't my own Alma Mater, I have known 'TKK' (The Helsinki University of Technology) since my childhood. My father was from 'TKK' and we*

visited the campus often." (Major donor interview)

"I got interested in and familiar with Aalto's work during the first government's matching campaign. Graduates from Aalto are important potential recruits for our family company. Additionally, we also wanted to contribute to reducing the education system's dependence on the Finnish government's arbitrary decisions and budget cuts." (Major donor interview)

"Actually, this has happened - especially through individual relationships - as I've gotten to know the Deans or individual Professors from Aalto, or even people who were involved in building this new university. Gradually, I've formed the impression that I actually really like what I see in Aalto." (Major donor interview)

Additionally, a university representative and its faculty can have a strong influence and build trust when major donors are considering a donation.

"The professor from this 'X' area was particularly inspiring and influential. My decision to donate arose from this encounter." (Major donor interview)

"I think that Jens (the Head of Department) has in a nice way brought forth the issue and highlighted the importance of donating." (Major donor interview)

Furthermore, sometimes also other donors can play a significant role in the decision to donate as well.

In response to the influence of others on the decision to donate; "Yes, it may have had an impact. At least, 'N.N.' was active at that time. His personality is engaging and persuasive. I don't know whether it influenced my decision to donate Aalto or not, but he was somehow involved. Yes, I do associate him with that idea, however." (Major donor interview)

<u>University's mission and values count</u>

Several donors highlighted in the interview discussions that they really appreciate and value Aalto's mission and proactive role in shaping a more sustainable future. That the university is really producing concrete solutions and trying to make the world better and more sustainable for future generations with the help of multidisciplinary and entrepreneurial mindset.

"I particularly appreciate Aalto's current strategy. It plays an important role in building a sustainable future, and I must say, it inspires me greatly." (Major donor

interview)

"Yes. This matters, that I'm able to make the world a better place in some way through donating." (Major donor interview)

"I think that it is important that we get the research and development all the way to startups. That we get the practical skills, and the courage to do and try." (Major donor interview)

"It matters that the intended purpose and vision of the organization, and what it aims to achieve, are sufficiently clear and credible. That is very important for the decision to donate." (Major donor interview)

"When these three universities and fields were merged, I thought it was a good thing. And that's how it turned out to be." (Major donor interview)

The importance of education and research

Furthermore, the donors also see education and research carried out in universities as extremely important for the future in general and specifically for the advancement of Finland. In addition, the donors expressed a strong belief in the critical importance of supporting universities due to their role in fostering innovation and expertise.

"I donate to universities because universities need our support."
(Major donor interview)

"Universities may not necessarily have the resources to fund entirely new initiatives, but they sustain a solid foundation from which these new ideas and innovations can emerge." (Major donor interview)

Additionally, the donors emphasized the crucial role of education and expertise in maintaining the optimal level of knowledge and skills in Finland.

"Everyone needs to understand this, that it's the only way we will navigate the future, that our expertise and knowledge are at a good level here in Finland."
(Major donor interview)

Gratitude, giving back, and culture of giving

Those major donors who have their own educational background in Aalto's predecessor schools express their appreciation and gratitude for the education and the positive impact it has had on their personal lives.

> *"It was really important school for me. Those years meant a lot and gave a strong start for my career. I've wanted to somehow pay back."* (Major donor interview)

> *"I've seen donating money and mentoring students as a way to thank and express my gratitude for the opportunity to study here myself."* (Major donor interview)

> "*Without trying to put oneself on a pedestal in any way, a certain thought comes to my mind. Essentially, it's the idea that 'nobility' carries an obligation. When one is in a privileged position and life has treated them well, it obliges them to give back. In my opinion, it's not solely about good will, but there's a certain belief that donating is a duty of citizenship, an 'Aalto citizenship obligation'."* (Major donor interview)

Another donor phrased this same thought and attitude the following way:

> "*I have been brought up – primarily by my grandparents – with the idea that wealth carries an obligation. That when there is the opportunity to contribute to making positive things happen, one must also act accordingly."* (Major donor interview)

One notable aspect that became visible and seemed to be in common for major individual donors, was their prior experience in the culture of giving. For instance, more than half of the interviewed major donors had lived and either studied or worked abroad. The donors emphasized the fact that those years spent abroad have created them a habit of giving.

> *"Of course, there was also the fact that when living in the U.S. for a long time, I became quite familiar with donating during that time. Everyone was raising funds over there."* (Major donor interview)

> *"Yes, as a family we used to live in the States. During those years you got quite used to fundraising and also giving donations."* (Major donor interview)

> *"The university 'Z' abroad, where I did my MBA studies, is quite active and professional in their fundraising processes. Maybe sometimes even a bit too proactive, you could say. I have donated to them several times, but not every time when I have been asked, because I feel their fundraising approach is a bit too much and overly aggressive to my taste."* (Major donor interview)

Personal benefit

Even though the donations are unconditional by nature, without expectation of transaction, the possibility of gaining some personal benefit, for instance the tax deductions and increase in the value of one's own educational degree, was highlighted as an influential factor in the decision-making process when giving major donations to an organization.

> *"During the phase of seeking the Aalto's base funding*, the government's matching (multiplier) and the tax deduction rights were important. Those played a particularly significant role in the initial donation decision." (*In the years 2009-2011)*
> (Major donor interview)

> *"I have considered it very important for individual donors to be able to make tax deductions for their donations; it has definitely had a significant impact for my decisions."* (Major donor interview)

> *"I think this benefit perspective was highlighted well in the fundraising process - the tax deduction opportunity, which is a tangible aspect that benefits the donor as well."* (Major donor interview)

> *"I feel that the value of my own degree has also increased during the Aalto years."*
> (Major donor interview)

> *"I value Aalto and I would be pleased to see that my children find an interesting study program at Aalto in the future."* (Major donor interview)

For a major donor, access to interesting discussions, new knowledge, and social networks can also be seen as a personal benefit.

> "*I have a feeling that I am part of the group of donors and the community. And of course, when I know the Aalto leadership personally, it's clear that when I meet with Ilkka (the President of Aalto) or the Dean or others, we always have interesting and topical conversations. They are very easy to approach, they are just people in that sense, not 'stiff university professors' with whom an old-fashioned person like me can't really connect, quite the opposite. They themselves know the significance of the network in this regard and their role is quite important.*" (Major donor interview)

> "*Concrete, tangible experiences, new knowledge, and possibility to learn inspire me. As a donor I get chances to experience these in the university community.*" (Major donor interview)

<u>Transparency, systematic communication, and reporting back</u>

When asked about the ways and how's of donor relations and its processes, the donors emphasized the importance of consistent and systematic communication, as well as the chance to engage in open dialogue with the university's leadership and professors.

> *"I just received an event invitation from the rector (President of Aalto), was it for October, I think. So yes, these things and opportunities to hear and discuss what is happening in Aalto and in different research fields are really important ones."* (Major donor interview)

> *"All kinds of visits, meetings, events, and exhibition tours are important. Otherwise, it's difficult to fully understand the university's and its operations' impact; seeing and experiencing it for oneself is crucial."* (Major donor interview)

> *"It is essential that afterwards you receive updates and information about the donation target's and Aalto's situation often enough. I think that this is actually very well implemented and conducted in Aalto; there is sufficient consistency and continuity in the processes."* (Major donor interview)

The role of donor engagement and stewardship is highlighted in other comments as well.

> *When asked about the recognition of donations: "Well, I feel like saying, I don't really know how Aalto as a university has handled this, but 'Y.Y.' from the donor engagement team has managed and taken care of the donor relations really well."* (Major donor interview)

> *"Of course, when thinking about the experience as a donor, it is important making sure that the things and reports that have been promised to donors are also delivered."* (Major donor interview)

> *"Events with a small enough group are particularly beneficial as they encourage discussion and interaction. This fosters conversations about potential opportunities as well as current challenges."* (Major donor interview)

The importance of efficient communication is evident. Email is almost unanimously seen as the most convenient and effective tool for communication and reporting back the impact of donations.

> *"Email is the number one, best way to stay in touch. I don't follow social media channels."* (Major donor interview)

> *"Well, I read emails all the time, every day. I'm not much of a WhatsApp person. But email works very well for me."* (Major donor interview)

On the other hand, phone calls and social media channels are felt to be less attractive ones.

> *"I prefer email the most. I personally don't like phone calls. I also have to say that I don't like the idea that the donor is expected to visit some website every now and then."* (Major donor interview)

> *"I think that for a donor, it is particularly annoying when your name is found on an organization's donor list and then you are called because you're automatically expected to make the next donation. It evokes the feeling of being a target of generic telemarketing. This often leads at least to me a "thank you, but no thank you" sentiments and feelings."* (Major donor interview)

Unfortunately, emails can sometimes be an uncertain and unreliable tool in donor communication, as was evident during one of the donor interviews.

> *"I don't currently feel that I have been very involved in the university's activities as a donor yet. It's possible that not all messages have reached me, as my donation is still quite recent one."*
>
> (It was revealed after this interview discussion that the messages and invitation sent by the rector and the donor engagement team had not reached the interviewee, as those emails had ended up in the interviewee's spam folder.)
> (Major donor interview)

Thus, the role of printed communication materials is highlighted. The once a year published and printed report, 'Review for Donors', with topical articles and financial data from Aalto is getting appraisals from the interviewees.

> *"The physical Review for Donors is really good. Emails can easily go unnoticed."*
> (Major donor interview)

> *"In fact, these annual high-quality publications that report on donations' impact are also very good."* (Major donor interview)

One donor also mentions the University of Helsinki's university magazine as particularly valuable one. The donor views it as a very high-quality and interesting publication.

Furthermore, the overall importance of impact communication and the need for systematic interaction and reporting back is described well in the following major donor's comment:

"It is important to understand the emotional attachment of the donor to the donation made. The university should remember that the donor themselves will remember their major donation for their entire life." (Major donor interview)

"When it has been a larger sum of money, I mean, a larger donation amount, then there would have been alternative uses for it as well. In that case, the donor must be sufficiently convinced that this donation and its purpose were a better choice than any other option." (Major donor interview)

4.3 The development points in donor experience

The interview discussions revealed several crucial aspects and elements contributing to a positive major donor experience. Some potential pain points were identified, even though the interviewees overall evaluated their donor experience and various encounters very positively. Main learnings and insights regarding the important elements of gratifying and engaging major donor experience are listed in the following Table 7.

Critical aspects for a positive major donor experience:
- Facilitating long-term **connection** and dialogue with the donor and the university community
- Showing **responsibility** and active initiative, being flexible in different encounters
- Communicating in systematic manner but with a **personal touch** – both email and printed materials and in face-to-face interactions
- Regularly **reporting** the impact of donations and research results
- Offering tangible and **concrete experiences** and encounters
- Being genuine and **easy to approach**

Table 7: Critical aspects in a positive major donor experience.

These six aspects effectively outline the key components that seem to contribute to a positive major donor experience. They cover various important elements such as communication, engagement methods and processes, reporting, and transparency, which are essential for maintaining strong relationships with major donors.

The following quotes from major donors' interviews support these reported aspects and key elements:

> *"I think that in especially good encounters a person takes on greater responsibility than assumed, with a personal approach, and is sufficiently flexible when necessary."*
>
> *"The attitude is important. One can quickly sense whether the person is passionate about their subject and willing to get the job done. Another important element is to put oneself in the other person's shoes. If one can combine these two things, the result is usually good, and the experience is particularly positive."*
>
> *"Of course, it is important and crucial to do what has been promised."*
>
> *"In large donations, more personal contact and communication are important. Those decisions and donations are not made on a whim."*
>
> (Major donor interviews)

Furthermore, some additional development needs and focus points were raised in the interview discussions. For instance, the donors emphasized that the university should start nurturing connections with students, alumni, and other stakeholders as early as possible. This would be critical for strengthening the culture of giving and also creating the habit of giving back. In addition, helping the existing donors to recruit new donors for the university's causes would be beneficial.

> *"I have indeed tried to persuade others to donate, but it hasn't been easy."*
> (Major donor interview)

It is also important to listen to the needs of donors and potential donors and ask directly about their expectations, whether related to the visibility of donations or the ways and means of donor engagement practices. In addition, remembering that fundraising is not just about money and monetary donations; providing various options, including smaller donation targets and causes, as well as diverse opportunities for showing support and contributing to the university, is crucial.

> *"I believe it's also a good thing that certain donation targets are occasionally highlighted more widely in the media and public. For example, the donation cause and target for students coming from Ukraine received great visibility, and I think that these initiatives are especially effective for making smaller donations."*
> (Major donor interview)

> *"Having a possibility to visit the labs and meet the professors and researchers. These kinds of options could be offered more often. For instance, I would be interested to see and visit the chemistry labs – even though it's not my original study field or field of expertise in any way."* (Major donor interview)

In the following chapter, the outcomes of this thesis work's service design processes are displayed in concrete.

4.4 Service design process' outcomes

As part of this thesis work and the deliver phase of the process (chapter 3.4), tangible service design artefacts and concrete solutions and tools were created as well. These concrete outcomes from the development process are presented next.

<u>Donor behavior archetypes</u>

Based on the insights and learnings gathered from the research process and from the theoretical concepts, four donor behavior archetypes for major individual donors were identified and created. These archetypes and personas don't represent any real donors or individuals, and they are free from personal characteristics. However, they are still based on this thesis and driven from its research process and its findings. One should also remember that these personas and their behavior, and the primary motivations they represent can overlap and cut across several groups of people at the same time. Hence, one donor can have expectations, decision-making criteria, and behavior that represent several different donor behavior archetypes. To keep this aspect clear, I decided not to use any individual pictures, names, nor demographic information (e.g., gender or age) in the donor behavior archetypes' descriptions which could unintentionally misguide the reader. Rather, I aimed to describe the behavior, interest, needs, and expectations of the certain major donor archetype and name and label it to illustrate that behavior and the primary motivations. (Stickdorn et al. 2018, 41-43.)

The four identified major individual donor behavior archetypes are the following: The engaged insider, the mission-driven, the strategic benefactor, and the obliged donor behavior archetype. See Table 8 for a summary of these donor behavior archetypes and their special characteristics.

The donor behavior archetype	Characteristics	Expectations	Jobs to be done	Quote
The engaged insider	Actively engages in the university community's work, campaigns, and overall development. Regularly attends donor events and donor meetings. Knows personally several faculty and leadership members and has broad social networks in the community.	Expects to be actively involved and contacted. Wants to have a concrete understanding of the university's operations by seeing and experiencing them firsthand.	Regularly nurture a sense of belonging and connection to the community, acknowledge the donor's history. Use personalized communication methods and approaches.	*"I have a feeling that I am part of the group of donors and the community. And of course, when I know the Aalto leadership personally, it's clear that when I meet with Ilkka (the President of Aalto), the Dean, or others, we always have interesting and topical conversations."*
The mission-driven	Finds motivation in the university's mission and research areas. Is especially driven by the cause and specific donation target. Participates events and meetings related to these research areas and motivations.	Expects active communication and dialogue within the particular area. Wants to gain a deep understanding of the donation target and to receive up-to-date impact reports on the cause.	Recognize the particular cause and its donors and ensure systematic and transparent communication to the contributors. Provide donors with opportunities to receive recent updates from the field and to stay connected with the cause.	*"I particularly appreciate Aalto's current strategy. It plays an important role in building a sustainable future, and I must say, it inspires me greatly."*
The strategic benefactor	Considers personal benefits when making donation decisions. Values tax deductions and other incentives, such as government's matching, when giving. Appreciates access to new knowledge and social networks.	Expects a smooth and professional donation process. New experiences and possibilities to learn. Expects the value of one's own degree to increase.	Offer mutually benefiting possibilities and experiences for donors. Actively communicate the direct and indirect benefits from the donor's perspective as well.	*"I have considered it very important for individual donors to be able to make tax deductions for their donations; it has definitely had a significant impact for my decisions."*

The obliged	Feels obliged to donate and support the department, school, or university. Desires to pay back. Expresses a giving-back culture.	Expects various ways to demonstrate and express one's support. Places special value on encounters and interaction with students.	Offer the donor several different means to contribute and give back. Recognize the donor's own personal history.	*"I've seen donating money and mentoring students as a way to thank and express my gratitude for the opportunity to study here myself."*

Table 8: Summary of donor behavior archetypes and their characteristics.

These four distinct archetypes are described more concretely next. All donor behavior archetypes and their descriptions are displayed in full-size also in Appendices section (appendices 4-7).

#1 The engaged insider

The engaged insider donor archetype is actively involved with the university community, and its campaigns, events, and overall development. For instance, this can in practice mean participation in university's advisory or campaign boards. Personal history and connections in the university community are also notable in this donor behavior archetype.

In contrast, this donor archetype expects to be proactively and personally contacted and involved and appreciates having a concrete and firsthand understanding and experience of university's operations and needs. This donor behavior archetype is described more cohesively in the Figure 18.

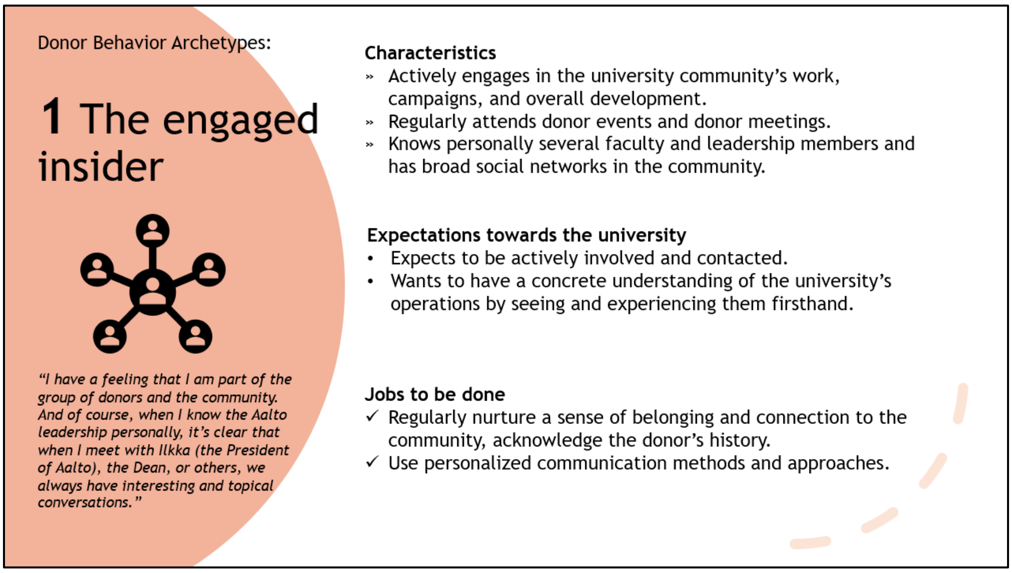


Figure 18: The engaged insider, Donor Behavior Archetype

#2 The mission-driven

The mission-driven donor archetype finds special motivation and interest in university's mission and research areas and is in particular driven by the cause and specific donation target. This donor archetype also seems to be topically more focused and selective when participating in the university's events and seminars. This donor archetype appreciates proactive and systematic communication, dialogue, and impact reporting within the particular cause and research area. The mission-driven donor archetype is portrayed more concretely in Figure 19.

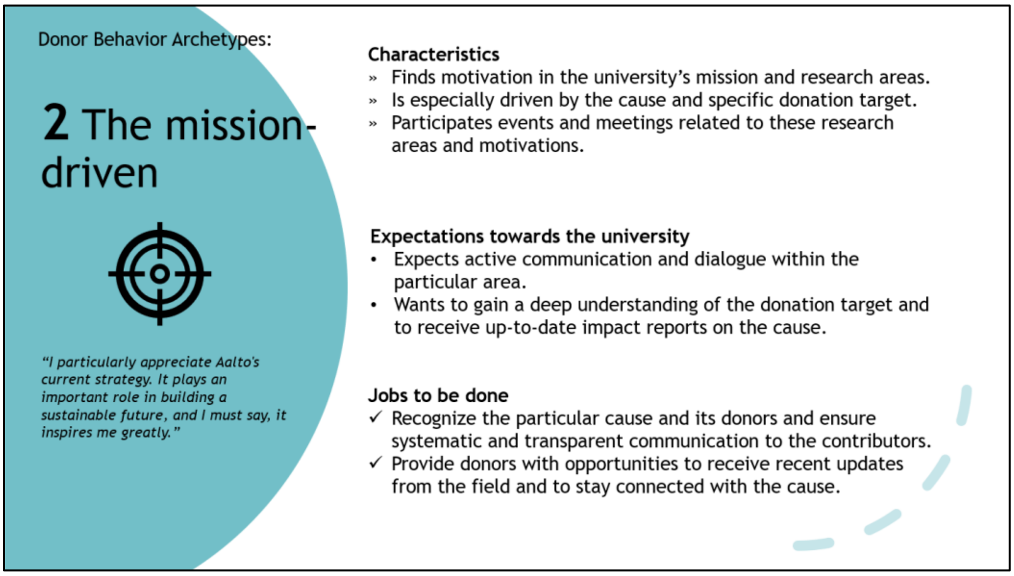


Figure 19: The mission-driven, Donor Behavior Archetype

#3 The strategic benefactor

The strategic benefactor systematically weighs and evaluates different kinds of benefits and incentives when making the donation decisions. For instance, these benefits may include tax-deductibility of donations, matching schemes, or other mutually beneficial aspects of donating. Access to new knowledge and social networks can be seen as a personal benefit as well. From the university this donor behavior archetype expects professionally conducted and automatic processes (e.g. reporting the tax-deductible donations to tax authorities) but in addition, also different kind of possibilities to learn and broaden one's own knowledge base. A more detailed description of the strategic benefactor is shown in Figure 20.

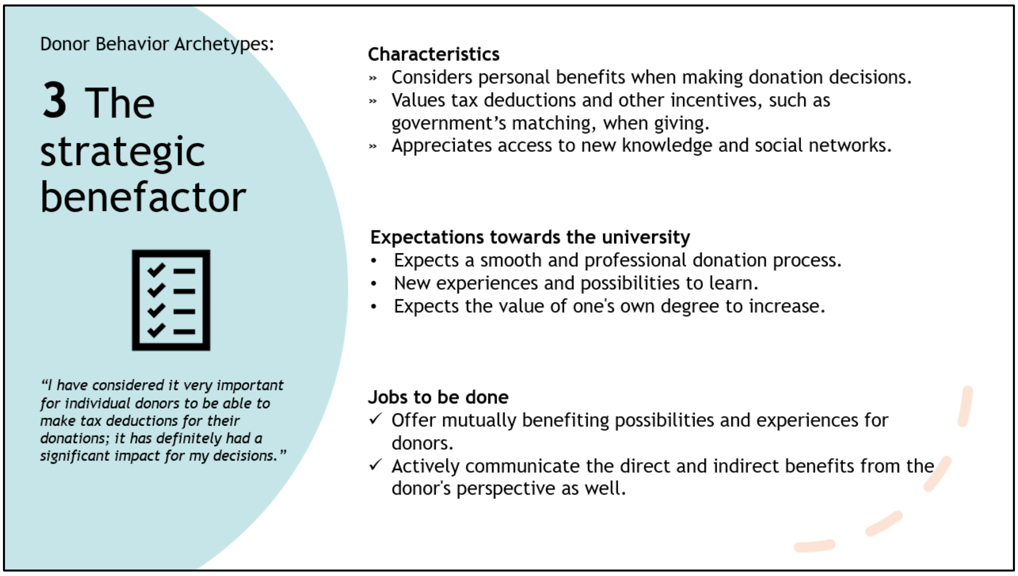


Figure 20: The strategic benefactor, Donor Behavior Archetype

#4 The obliged

The obliged donor behavior archetype is characterized with a strong sense of obligation and responsibility in one's giving. This donor behavior archetype desires to pay back to the community or otherwise expresses a giving-back culture and mindset. Thus, the obliged donor behavior archetype appreciates different ways and means to demonstrate and express one's support. The obliged donor behavior often plays extra value and importance on interaction with students. The obliged donor behavior archetype is outlined more concretely in Figure 21.

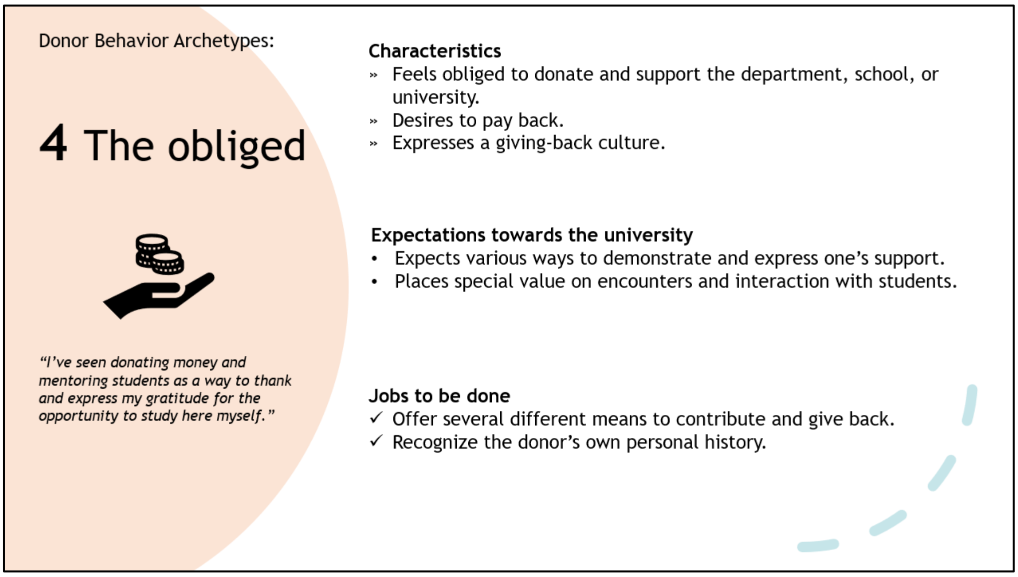


Figure 21: The obliged, Donor Behavior Archetype

These donor behavior archetypes could also be grouped into two different categories based on their primary motivations. The mission-driven donor behavior archetype and the strategic benefactor archetype are more *content-oriented behavior archetypes*, meaning they are primarily motivated by the content, purpose, or different kinds of incentives. On the other hand, I see that the engaged insider archetype and the obliged donor behavior archetype are *role-oriented behavior archetypes*, as their donation motivation is essentially rooted in and driven more by their role and personal history. See the Figure 22.

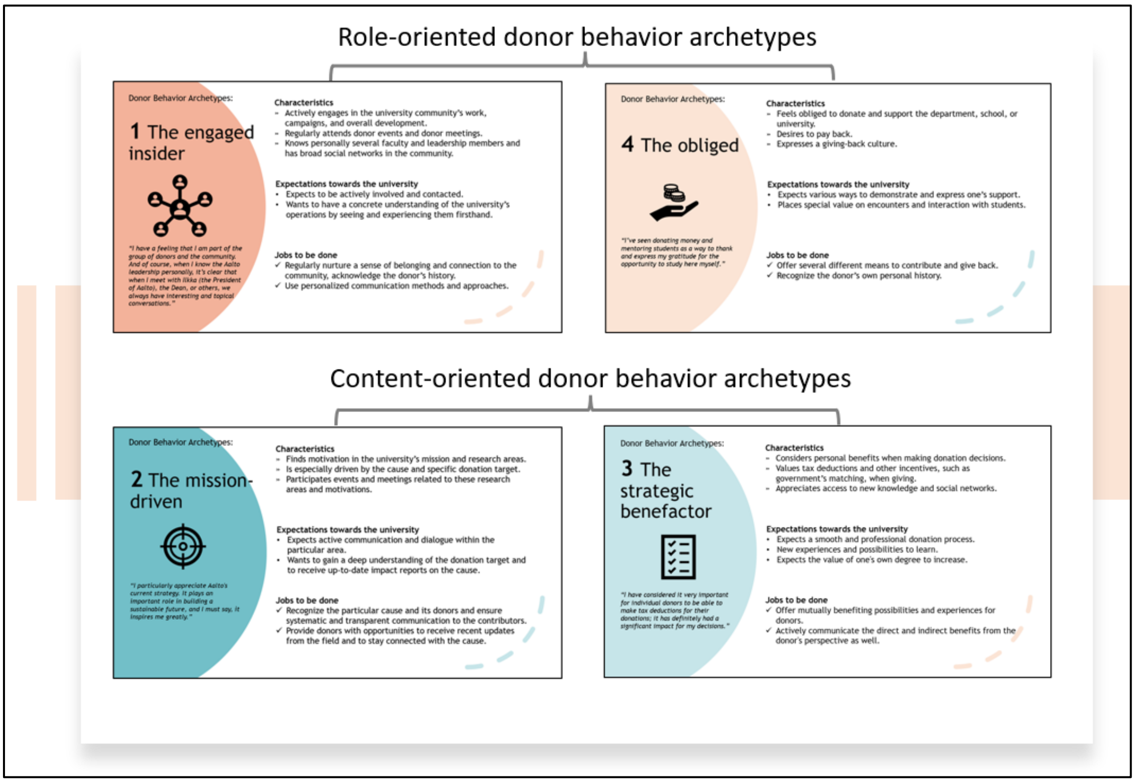


Figure 22: Content-oriented and role-oriented donor behavior archetypes

Based on these previously mentioned insights, archetypes, and assumptions, development points and major individual donor journeys' needs were identified as well. These are presented and listed more closely next.

<u>The donor journey development</u>

Another concrete service design outcome of this thesis project was the journey map development. Journey maps and their role in service design and process development were described more thoroughly in chapter 3.4.

In the development of the major donor journey, I included and integrated the donor engagement criteria and critical points identified earlier in this thesis, specifically tailored for the major individual donor experience. This major donor journey map is based on and drawn from the primary phases of the major donor cultivation cycle (already presented in Figure 12). This more high-level way to visualize the most important phases and critical aspects for major individual donor engagement and experience is illustrated in Figure 23. There I sketched those slightly modified main steps and elements in relation to the ideal major donor cultivation cycle and process.

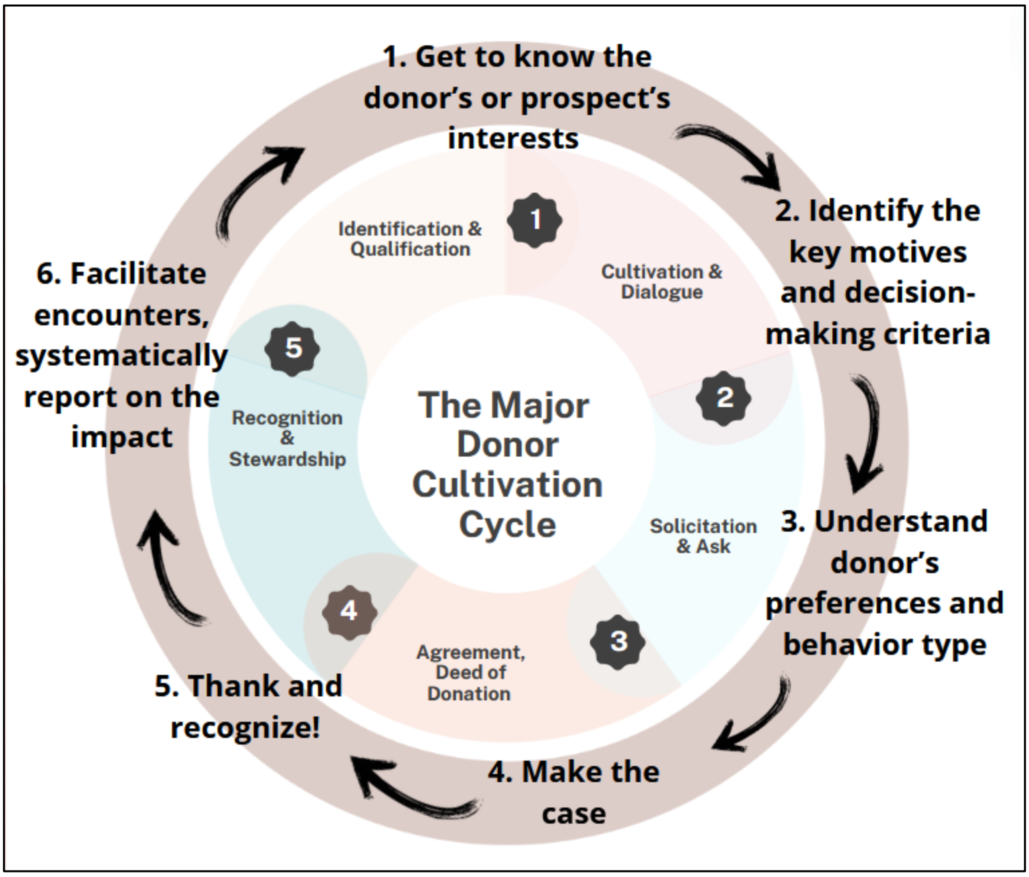


Figure 23: Insights derived from this thesis work and drawn in relation to The Major Donor Cultivation Cycle

Furthermore, a more detailed journey map for managing major donor relations is presented in Figure 24. Although this detailed major donor journey map appears linear, the actual relationship process should evolve and always include a continuous, circular process.

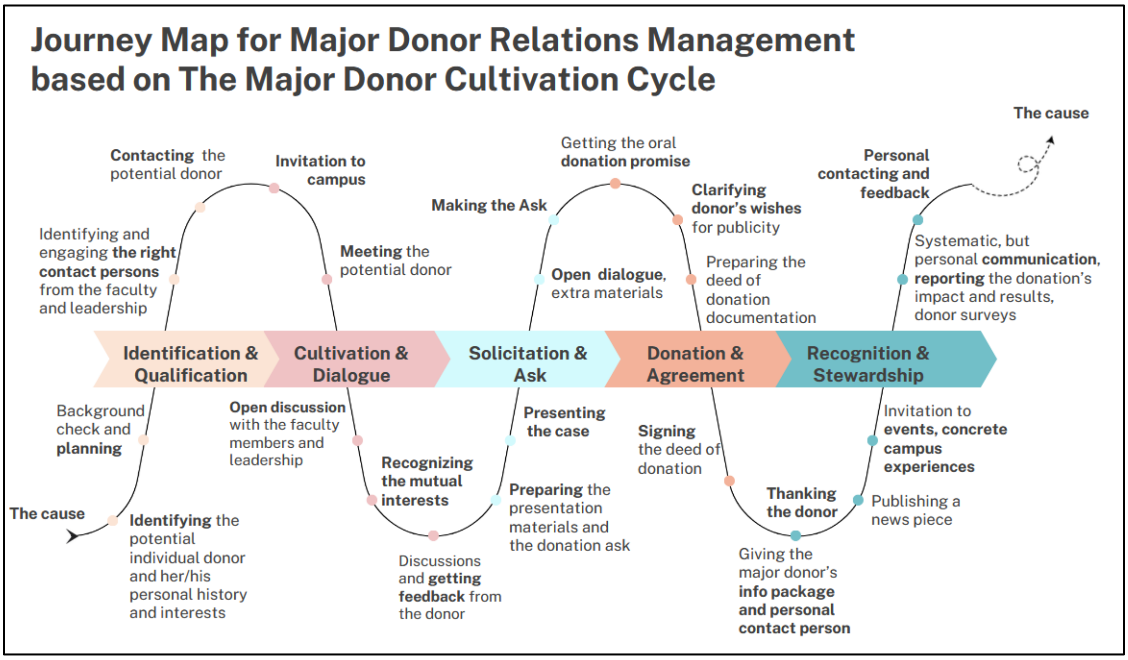


Figure 24: Journey map for major donor relations management based on The Major Donor Cultivation Cycle

The experience blueprint

The third concrete service design process outcome and artefact of this thesis work is the experience blueprint on major individual donors. This high-level experience blueprint was made to describe the overall major donor cultivation steps and experiences from a major donor's perpective. In other words, what kind of experiences and feelings the university should aim to facilitate for its major donors and prospects. This experience blueprint bases heavily both on the major donor cultivation cycle and the insights gathered during this thesis work.

The main feelings to be cultivated are:

1. The donor feels acknowledged, and their initial interests are recognized.
2. Donor feels that their key motives and decision-making criteria are understood.
3. Donor's preferences and behavior type are acknowledged. The case and 'the ask' is made accordingly.
4. The donation details are clear for the donor, and the official paperwork is ready.
5. Donor feels thanked and recognized, meaningful encounters are facilitated, and the reporting of the impact is done systematically.

The experience blueprint is illustrated in the Figure 25.

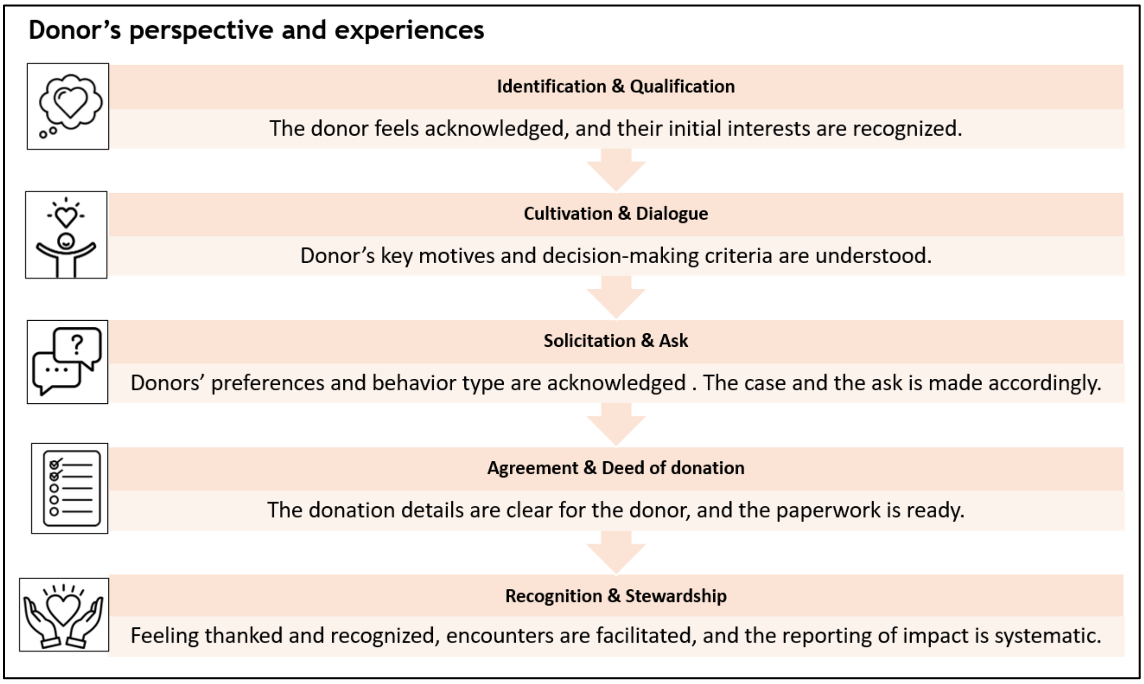


Figure 25: High-level experience blueprint and broad outline for major donors

In the following section and last part of this thesis work (chapter 5, Concluding thoughts), I will discuss and evaluate the results obtained during the course of this thesis project, and their relevance in relation to the objectives and research questions set for this thesis.

5 Concluding thoughts

This thesis work and development project has offered various insights and learnings regarding major individual donors' characteristics and their experience as donors. I will look at these findings, and especially, evaluate them against the thesis work's purpose, aim, and research questions next.

Purpose and aim of the thesis

The primary purpose of this thesis work was to investigate how to enhance the engagement and donor experience of major individual donors in the higher education sector. Aalto University served as the case study in this.

The aim of the thesis was twofold:

- First of all, the aim was to identify the characteristics of major individual donors, and their reasons for donating to the university.

- The other part of the aim was to analyze the existing donor experience and recognize the key elements contributing to a positive donor experience.

As highlighted in this thesis work, the motivation, reasons for donating, and characteristics of major individual donors vary. This aspect was also illustrated in the results section of this thesis. Nevertheless, one can identify from the data several motives that influence major donors' prosocial behavior and willingness to give donations to the case university.

These aspects were:

1. the personal connection, history, and bond, and trust for the institution,
2. the university's mission, strategy, and values,
3. the overall importance of education and research,
4. gratitude for one's own education, the possibility to give back, and the culture of giving,
5. personal benefits, such as tax deductions and access to interesting discussions and new knowledge, and
6. systematic and transparent communication and reporting.

For further details and concrete examples, see the Table 6: Main themes in major donors' motives and needs in giving in this thesis document.

Based on the insights into the main characteristics of major individual donors, four donor behavior archetypes were identified and created.

1. *The engaged insider behavior archetype* participates actively in the university's work and often has broad social networks and personal connections in the university community. This donor behavior archetype also appreciates and expects to be consistently and personally involved with the university's operations.

2. *The mission-driven donor behavior* archetype is especially motivated and driven by the university's mission, different research areas, or specific cause and donation target. The mission-driven donor behavior archetype is perhaps more focused in his or her particular interest area and values topical and targeted impact reports and communication from the institution.

3. *The strategic benefactor donor behavior archetype* considers and values personal benefits when making decisions regarding donations. These personal benefits can be, for instance, tax deductions and other incentives. Or possibility to learn and get access to brand new knowledge or interesting social networks. Serving mutually benefiting experiences, approachable services, and clear processes to this donor behavior archetype is important.

4. *The obliged donor behavior archetype* expresses an especially strong giving-back culture. Feels obliged and driven to donate and give back to the university. Offering several different ways and means for this donor behavior archetype to contribute and show support is appreciated and needed.

However, it is essential to remember that these major individual donor behavior archetypes can and most often will overlap with each other. One donor can express and represent multiple donor behavior archetypes.

In addition, I argue that the primary motivations of these donor behavior archetypes can also be grouped into two different categories. Both the mission-driven archetype and the strategic benefactor archetype are *content-oriented* donor behavior archetypes because they are especially motivated by the purpose, content, or some other concrete incentives. Alternatively, the engaged insider archetype and the obliged archetype are more *role-oriented* donor behavior archetypes, as their motivation in philanthropic giving is especially rooted in and driven by their role and own personal history and connections.

When evaluating these described donor behavior archetypes and their primary motivations against Konrath's and Handy's (2018, 349) research and the identified motives and factors in giving

- the Other-oriented motives (i.e., altruism, trust, social) and
- the Self-oriented motives (i.e., egoism, guilt, fiscal incentives, esteem),

I claim that it is not applicable to group or categorize this thesis work's donor behavior archetypes to Konrath's and Handy's other- and self-oriented categories.

On the other hand, I state that one can find several similarities and inspiration from Deci's and Ryan's classical self-determination theory (SDT) of motivation and the interplay of intrinsic and extrinsic factors (Deci & Ryan 2012), Hesse's and Boenigk's (2023) donor inspiration concept, and Morgenroth et al.'s (2015) "inspired-by" (extrinsic source) or "inspired-to" (intrinsic pursuit) forms when analyzing previously illustrated motives and characteristics of major donor archetypes.

Thus, I state that the *obliged* donor behavior archetype represents more intrinsic factors and *inspired-to* form. Alternatively, the *engaged insider*, the *mission-driven*, and the *strategic benefactor* behavior archetypes stand more aligned with *inspired-by* form and extrinsic motivational factors.

Nevertheless, it is notable and worth highlighting that some motivational aspects and factors that have been visible in the earlier research results seem to be somewhat missing and absent in the insights and results gained in this thesis work. For instance, the role modelling concept and its importance in giving, as demonstrated by King (2005) and also, Morgenroth et al. (2015), were not reflected in the data of this thesis. Furthermore, the research findings of Worth et al. (2020) concerning mega-gift donors and their motivations related to *memorial* or *leaving a legacy* were not clearly shown or included in this thesis' results either.

See further details of these research results and theories on motivation in chapters 2.1 and 2.2.

Answering the research questions

The three main research questions in this study were:

#1 Research Question: What are the characteristics of major individual donors contributing to the university?

In addition to the four different major donor behavior archetypes and their characteristics described earlier in this thesis work's purpose and aim paragraphs, it is evident that major individual donors have personal relationships and connections to the university, one way or another. This aspect seem to be the common denominator for major donors and it strengthens the overall trust towards the university as an institution and a community at large. Thus, the major donors appreciate personal interaction and dialogue with the university's leadership and faculty and staff.

#2 Research Question: What motivates the individual donors to give and donate to the university?

As illustrated previously, various sources of motivation and donor inspiration were recognized during this thesis process. For some, the primary motivation stemmed especially from their own personal history and connection to the university, as they wanted to support the development of the university and give back to the university community. Others were primarily motivated by the broader significance of research and education, as well as the university's mission to find solutions for a more sustainable future.

Additionally, personal benefits such as tax deductions and opportunities to access new knowledge and networks, along with other incentives, can further motivate major individual donors and influence their decision to donate. Furthermore, professional fundraising and donor engagement and stewardship processes, systematic communication, and transparent reporting of the impact of donations serve to reinforce and support donors' decision-making and contributions. However, it is notable that based on the insights and identified motivation criteria there were more aspects in common with the major donors’ motives and decision to donate than ones that separated or clearly set them apart from each other.

#3 Research Question: What strategies and tools can facilitate the development of donor journeys that are tailored to major individual donors, and what are the critical factors that contribute to a positive donor experience?

First and foremost, putting special focus and interest on knowing and understanding the major individual donors’ personal history, interest areas, and decision-making criteria better and on a deeper level are the most valuable tool when a fundraising organization is developing its donor journeys and different donor engagement practices. Based on this knowledge and deeper understanding of a particular donor, it is easier to comprehend donor’s main behavior type and recognize the primary motivational factors in donor’s giving as well.

Strategies and concrete tools that can help in the process can be, for instance:

- asking for regular feedback and views from a donor,
- conducting donor surveys,
- having personal donor interviews (face-to-face, on the phone, or online),
- organizing individual meetings or small-scale group events,
- producing and writing personal major donor stories,
- having systematic solicitation and donor engagement processes in place,
- naming dedicated officials and responsible persons from the university’s leadership and faculty,
- identifying different major donor behavior types,
- drawing donor journeys, experience or service blueprints, and
- if possible, organizing thematical workshops with major individual donors.

The modified major donor cultivation cycle, donor journey map, and experience blueprints that were created during this thesis can serve as frameworks to aid in the process and make the overall development of donor experience more tangible and comprehensible. See

Figure 26.

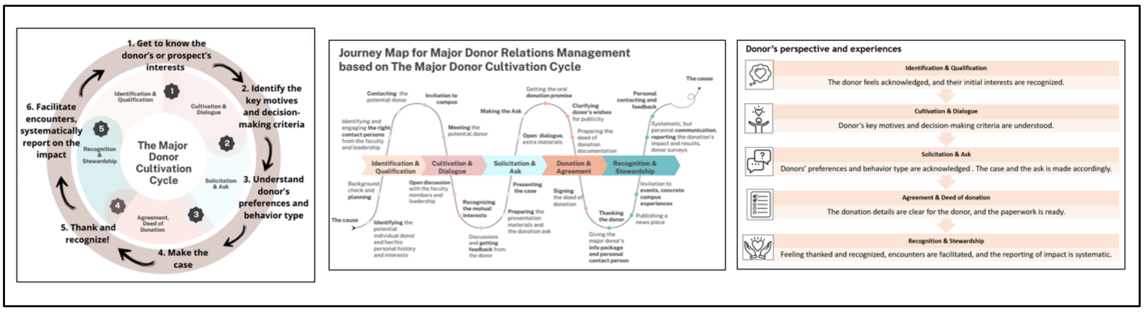


Figure 26: Examples of the concrete frameworks and tools in donor journey development

As already mentioned, it is important that the donor relations and practices in a fundraising organization are tailored to recognize and accommodate the diverse needs and preferences of major donors, given their varying expectations and approaches (Sargeant & Shang 2017, 432). Major donors, even though they might have many similarities, aren't a homogenous group of people and they shouldn't be treated that way either. Additionally, if the organization is fundraising also internationally, it is crucial to remember and recognize that many cultural aspects and differences can affect donors' prosocial and donor behavior as well. (Gregory et al. 2020, 594.)

In this thesis, the key elements and critical components identified for a positive major donor experience are as follows:

- Facilitating a long-term connection and dialogue with the donor and the university community.
- Showing active responsibility and active initiative, being flexible in encounters.
- Conducting systematic communication but with a personal touch – regardless of the ways and means of the communication channel.
- Reporting regularly on the impact of donations.
- Offering concrete experiences and encounters.
- Being genuine and easily approachable.

See also the Table 7 in chapter 4.3.

5.1 Discussion

Above all, this thesis and learning journey have deepened my expertise and knowledge in donor relations as well as recent research findings and theories from the field. The process has also offered me both broader and more tangible insights into the mechanisms and ways in which one can facilitate a better understanding and awareness of major donors and their expectations on donor experience. In addition, this thesis process has provided me with a valuable and practical opportunity to expand Aalto University's understanding of its major individual donors, their motivations in giving, and their decision-making criteria.

Personally, the major donor interviews and the data analysis and identification of patterns within them have been the most intriguing and inspiring parts of the process. In an ideal scenario, I would have liked to conduct one or two interviews more and also, arrange a workshop and focus group interviews with the major individual donors. However, major individual donors, as a group, are somewhat challenging in terms of scheduling and access, and naturally the sensitive nature and privacy of this thesis topic place some limitations on the process as well. Thus, ensuring the privacy and anonymity of the donors has been a crucial aspect throughout the whole thesis process. One should also remember the limitations of this qualitative and case-specific thesis work before making broad generalizations based on these insights and results.

Another question and limitation that applies to this thesis work as well is the following concern that was raised up already in Worth et al.'s (2020) research where the researchers asked: '*Can the donor still recall years later why they chose to make the donation and what actually influenced their decision making? What specifically motivated them to give at that time?*' In other words, how reliable and truthful can we consider the descriptions and responses by which the donor portrays and explains their key donation motives and decisions? Based on previous behavioral sciences research, we know that a person's memory is always influenced by many different factors and subsequent events and communication, often without our own awareness. (Worth et al. 2020, 286-287.) This aspect and possible limitation should be kept in mind when evaluating this thesis work's results.

In addition, as already stated in chapter 2.2, based on both Alston et al.'s (2018) and Gregory et al.'s (2020) earlier research papers, major donors are more responsive to personalized communication and personal approaches and cultivation methods. The donor's involvement with the cause enhances the positive attitudes towards the organization and the brand. Also, Anna Morrison's (2015) dissertation research indicated that donors' motivations and decision-making are primarily influenced by their emotional response to the fundraising and stewardship process, including their personal connection with the university and the opportunity to be involved in the project or cause. This emotional connection significantly impacted the size of their gifts. (Morrison 2015, 107, 109.)

Concrete tools and actions

When contemplating and evaluating the learnings of this overall thesis process and journey, I would also like to suggest that universities strengthen their processes and practices in major donor stewardship and communication even further and enhance and support transparency with tangible and concrete tools. In practice, this could mean, for instance, making a welcoming package and communication kit to new major donors. This kit and communication package could include information about "the type of communication the donor will receive, how the organization will report back to the donor, and who is the donor's main contact person in the organization".

An additional enhancement to major donor engagement processes could involve implementing also other personalized approaches. For example, booking and conducting brief and focused one-to-one 'check-in' interviews with major donors systematically every second year (on the phone, online, or in face-to-face meetings – depending on the donor's preferences). These interviews would offer an opportunity to inquire and gather information about major donors' satisfaction, get feedback, and gain insights into their developing interests, causes, and values. Also, asking from the donor directly: what do you expect from us? And what kind of communication and interaction would you like to receive from us in the future?

By actively engaging with donors in this manner, organizations can strengthen their relationships, tailor their approach, and align their engagement strategies with the philanthropic interests of their major donors even more.

5.2 Recommendations for further research

The need to better understand donor behavior overall and their decision-making processes offers several fascinating angles and viewpoints for further study. For instance, it would be interesting in future research to further investigate the impact of role models and the power of example, as well as the overall role of recommendations in donors' decision-making. Another captivating area and theory to study further would be the theories of engagement. How does engagement and strong commitment translate into donations?

Moreover, having a larger pool of major individual donors in the study would be beneficial and it would support and strengthen research insights' and results' generalizability overall. Also, using mixed methods approaches in future research, in other words, combining quantitative research methods (e.g., questionnaires) with different qualitative methods (i.e., focus group interviews, observation) would reinforce the generalizability and transferability of the results even more (Creswell 2014).

Planned giving (i.e., legacy giving and bequests) was excluded from the scope of this thesis and research. It would be interesting to conduct further comparative research on this area, especially in the Finnish context. For instance, do individuals who have pledged planned gifts differ in any way from other individual donors?

I also claim that is likely that both individual and organizational donors in the Finnish higher education sector will become more internationally and culturally diverse in the future. Thus, understanding different cultural factors and context will become even more relevant for universities in the next decade. This development introduces and presents many new research needs and perspectives for the future.

5.3 Closing remarks

This thesis provides an understanding of major individual donors and insight into their motives and decision-making criteria when giving. These insights, results, and different frameworks and models will hopefully enhance the quality of relationships with donors and improve the effectiveness of fundraising efforts in the Finnish higher education sector. As previously stated, (Polivy 2017; Breeze et al. 2023), donors have varied expectations and require different approaches, so the organization's donor relations and cultivation practices should be tailored to acknowledge and cater to these diverse needs, multiple and coexisting motivations, and different preferences amongst donors.

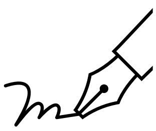
Given the recent developments in the university sector and the scarcity of financial resources, it is increasingly important to understand how to remain relevant in donors' minds and to grow and strengthen the donor base for the future.

Hence, I claim that today, donors and donations count and mean more now than perhaps ever before. For this reason, it is especially crucial to remember the following idea and the role of personal connection and bond, as emphasized by one of the major donors interviewed during the one-to-one interviews.

"It is important to understand the emotional attachment of the donor to the donation made.

That is, the university should remember that the donor themselves will remember their major donation for their entire life."

Thus, despite some earlier highlighted restrictions and limitations in the development setting of the thesis, I hope that both the service design approach and frameworks and the insights and results from the thesis will prove beneficial for the future and further development of major donor stewardship and cultivation practices, especially within the case university, Aalto University, but hopefully also in the Finnish and Nordic higher education sector overall.

Postscript 

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Figures

Tables

Appendices

Appendix 1: The interview themes and questions in Finnish

Taustatiedot ja lahjoittajatausta:

- Miten kuvailisit yhteyttäsi Aalto-yliopistoon?
- Voitko kertoa hieman historiastasi ja kokemuksiasi lahjoittamisesta yleisesti?
- Voitko kertoa tarinaa ja ajatuksiasi Aallolle tekemäsi lahjoituspäätöksen/-päätösten takana?
- Miten kuvailisit yhteyttäsi Aaltoon ja tämän suhteen kehitystä ajan myötä?

Keskeiset motiivit lahjoittamisessa:

- Mitkä syyt tai arvot motivoivat sinua tukemaan Aaltoa? Toisin sanoen, mikä sai sinut lahjoittamaan Aaltoon?
- Onko yliopistossa tiettyjä aloja tai aiheita, joita haluat erityisesti tukea?
- Oliko joitain erityisiä kokemuksia tai hetkiä, jotka erityisesti inspiroivat ja innostivat sinua tukemaan Aaltoa?
- Minkälaisena näet muiden lahjoittajien roolin lahjoittamisessasi tai lahjoittajakokemuksessa?
- Millaisen vaikutuksen toivot lahjoituksillasi olevan Aalto-yliopistolle ja -yhteisölle?

Kokemukset lahjoittajasuhteista:

- Miten Aalto on hoitanut lahjoituksesi kiittämisen ja huomioinnin?
- Miten Aalto on osallistanut ja sitouttanut sinut toimintaansa ja kehitykseensä?
- Mitä viestintätapoja ja -kanavia pidät henkilökohtaisesti mieluisimpina?
- Minkälaista tunnustusta arvostaisit ja toivoisit saavasi lahjoittajana?
- Mitkä tekijät ja elementit edistävät mielestäsi positiivista lahjoittajakokemusta?
- Luottamus on luonnollisesti tärkeää lahjoittamisessa. Mikä lisää omaa luottamustasi lahjoituskohdetta ja organisaatiota kohtaan?
- Miten haluaisit osallistua Aallon työhön ja arkeen tai juhlallisuuksiin? Mitä odotuksia sinulla on Aallolle?
- Kuvailisitko parasta asiakaskokemusta, jonka olet kokenut? (Olipa se sitten hotellissa, ravintolassa, kaupassa, yliopisto- tai hyväntekeväisyyssektorilla.) Mitä ominaisuuksia ja piirteitä tällä kokemuksella oli?

Kehittämiskohteet ja oppimistarpeet:

- Mitä voisimme mielestäsi tehdä parantaaksemme lahjoittajasuhteitamme ja lahjoittajakokemusta?
- Onko joku tietty taho, jolta voisimme oppia? Kenen toiminnasta voisimme oppia?
- Onko jotain, mitä voisimme muuttaa parantaaksemme omaa lahjoittajakokemustasi?
- Onko jotain muuta, mitä haluaisit vielä lisätä?

Appendix 2: The interview themes and questions in English

Background information and the donor history:

- How would you describe your connection with Aalto University?
- Can you share a bit about your history and experience with philanthropic giving in general?
- Can you share the story behind your initial decision to donate to Aalto University?
- How would you describe the evolution of your relationship with the University over time? Has it changed, and if, how?

The key motives in giving:

- What are the reasons or values that motivate you to support Aalto? In other words, what motivated you to donate to Aalto?
- Are there any specific fields or areas at the University that you feel strongly about supporting?
- Were there any specific experiences or moments that especially inspired you to support the University?
- How do you see other donors' role in your giving?
- What kind of impact do you hope your donations have on the University and its community?

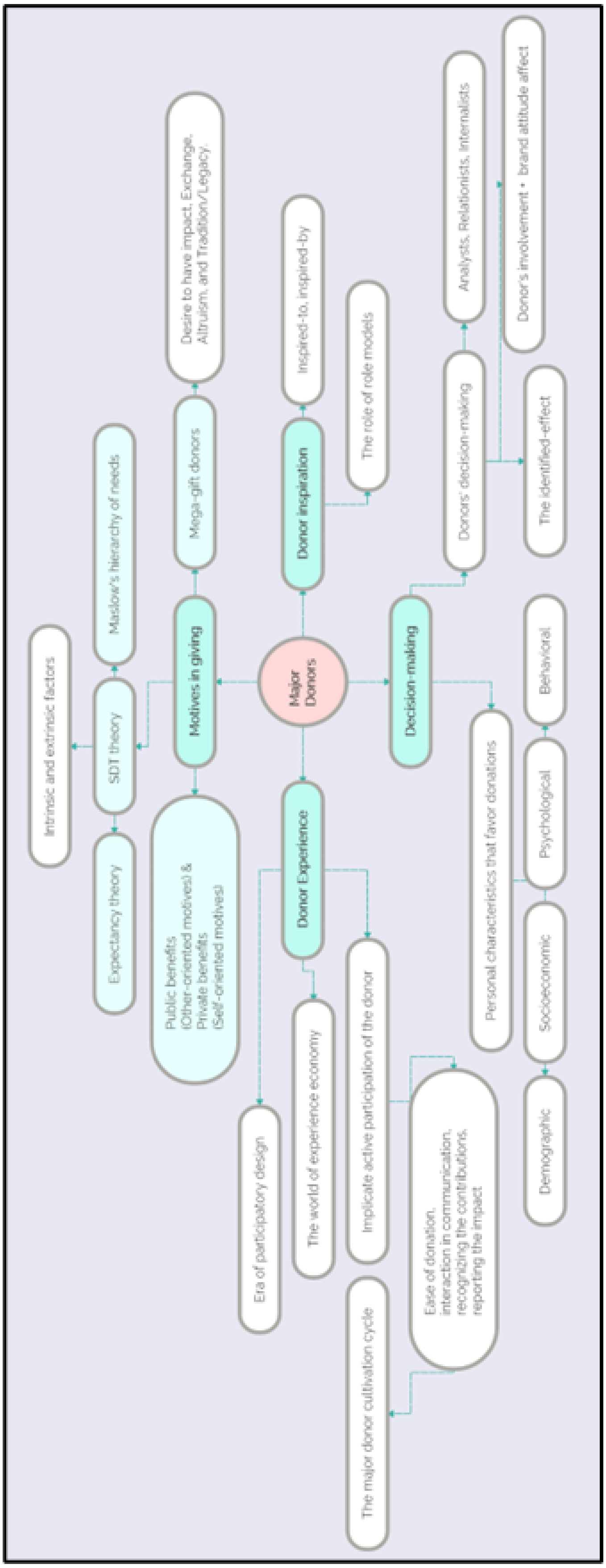
The perceived donor relations:

- How has Aalto handled the thanking and acknowledgement of your donation(s)?
- How has Aalto engaged and involved you in its activities and progress?
- Are there any particular initiatives or programs at Aalto that have deepened your sense of connection as a donor?
- What ways and channels of communication do you personally prefer?
- What kind of recognition would you appreciate of receiving as a donor?
- In your opinion, what factors and elements contribute to a positive donor experience?
- How would you like to participate and get involved in Aalto's everyday operations and festivities?
- Trust is needed in philanthropic giving. What increases your trust to an organization?
- What expectations do you have for Aalto?
- Could you describe the best customer experience that you have ever had? (Whether it has been in a hotel, restaurant, shop, or in university or charity sector.) What characteristics and elements that experience had?

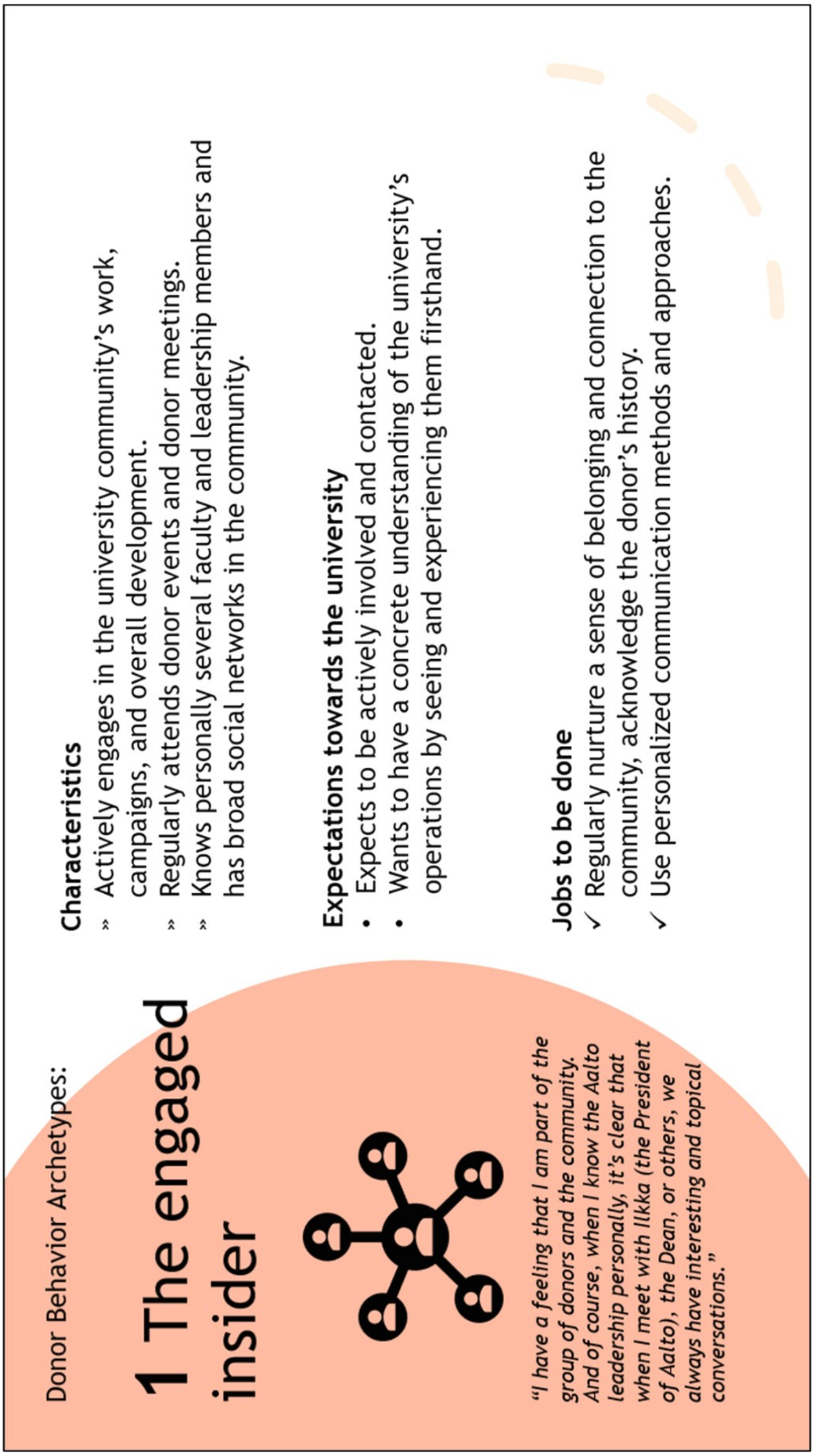
Development areas and learning needs:

- Is there anything we could do to improve our ways in donor relations in terms of engaging and involving donors?
- Is there someone we could learn from? Who should we benchmark?
- Is there anything we could change to improve our donor relations?
- Is there anything else you would like to add?

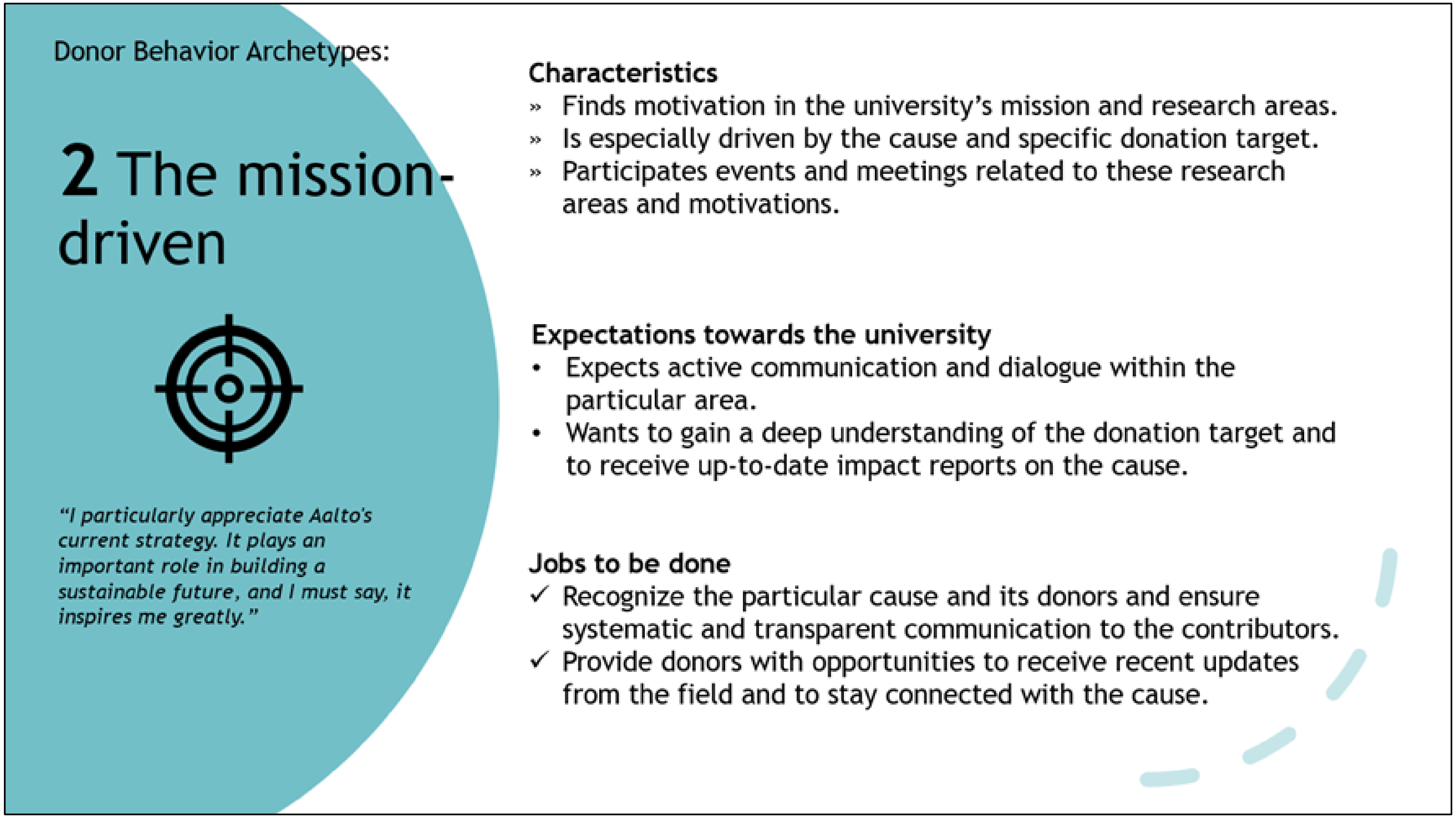
Appendix 3: The key theoretical concepts and their relations drawn to a mind-map.



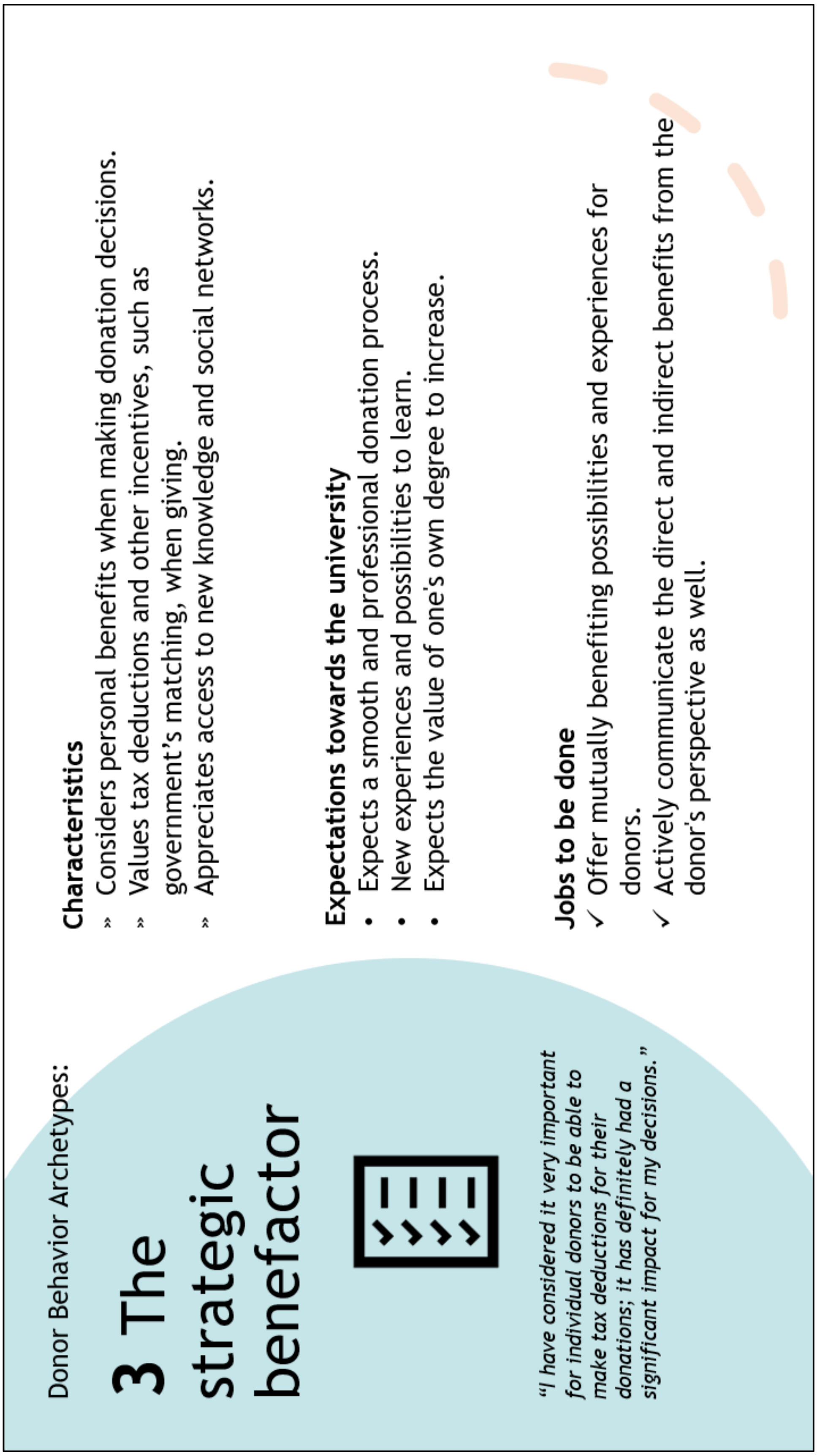
Appendix 4: Donor behavior archetype – #1 The engaged insider



Appendix 5: Donor behavior archetype – #2 The mission-driven



Appendix 6: Donor behavior archetype – #3 The strategic benefactor



Appendix 7: Donor behavior archetype – #4 The obliged

Donor Behavior Archetypes:

4 The obliged

"I've seen donating money and mentoring students as a way to thank and express my gratitude for the opportunity to study here myself."

Characteristics

» Feels obliged to donate and support the department, school, or university.
» Desires to pay back.
» Expresses a giving-back culture.

Expectations towards the university

- Expects various ways to demonstrate and express one's support.
- Places special value on encounters and interaction with students.

Jobs to be done

✓ Offer several different means to contribute and give back.
✓ Recognize the donor's own personal history.