

**Lack of early engagement: a pre-eminent barrier to Australian university bequest giving?**

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### **Abstract**

Decreased government funding has placed increasing financial pressure on Australian universities. Currently Australian universities receive 6.6% of all donations to nonprofit organisations in Australia (Australian Council of Social Service, 2005) while universities in the United States attract 14% (Department for Education and Skills, 2004). These figures suggest there is considerable room for improvement for Australian universities. Efforts directed towards adding to knowledge of philanthropy to universities in Australia are, therefore, very topical at present. Despite acknowledged differences between the types of literature on gift-giving it predominately centres on the motivation to donate to nonprofit organisations during an individual's lifetime (in vivo giving) with less focus on bequests. This exploratory study sought to gain insight into barriers to Australian University bequests. Lack of alumni engagement in Australian Universities was identified as a primary bequest barrier. Barriers identified previously in the literature (e.g. communications quality, performance, insensitive marketing) were considered secondary barriers to bequests. The results suggest a long term strategy is needed for Australian Universities seeking to improve donations. Universities need to engage students from the start of their academic tenure in order to be considered for a bequest. This paper proposes a model which highlights the consequences of this lack of early engagement and identifies key points in the academic and post-academic process where successive challenges increasingly diverge the student from the university's bequest prospects.

## **Introduction**

The higher education sector in Australia is under increasing financial pressure, with most universities seeking to enhance income from non-government sources (Schmidt and Peachey, 2003). In a recent submission to the Australian government Universities Australia (2008) notes that government funding is declining, suggesting the tertiary sector in Australia is expected to do more with less. Recent estimates suggest the total Australian university income derived from donations and bequests is 1.3% and this is declining (Australian Council of Social Service, 2005). Australian universities are seen as the 'poorer cousins' of their US counterparts who are generally used as a benchmark (Hendy, 2003). In the USA, income from alumni giving has always played a role in the financial wellbeing and independence of colleges and universities (Tom and Elmer, 1994). US colleges and universities received donations averaging almost US \$76 million each in 2000-2001 (Tsiotsou, 2006).

The research relating to donation behaviour has tended to focus on categorising the types of people who are likely to donate to charitable or educational institutions. Factors such as family wealth, marital status, number of dependents, age, gender, and geographic regions have all been identified as factors that can influence donating behaviour (examples include Chang *et al.*, 1999; Havens and Schervish, 1999; Rhoads and Gerking, 2000; Henz, 2005; Sargeant, *et al.*, 2006a; Tsiotsou, 2006). These studies have described donors using demographic variables and/or underlying motives for donations. Lindahl and Conley (2002), however, suggest that most studies indicate that a combination of psychological and sociological motives influence the decision to give rather than a single donor characteristic. These efforts have enabled us to understand how marketers can identify prospective donors and how donor cultivation strategies can be improved. To date research efforts have been US centric (Mahony *et al.*, 2003; Rhoads and Gerkin, 2000; Tsiotsou, 2006) and efforts have largely centred on lifetime charitable giving. The underlying assumption is that people are willing and hence can be motivated to donate.

Although a substantial body of research exists on why people give, less attention has been directed towards understanding why people do not give. This paper examines this important research question in the context of bequest giving in Australian Universities. This setting is appropriate because while the culture of giving in Australian is growing; growth has been at the expense of the education sector. Although donations by individuals increased 58% in current dollar values, the Australian education sector,

which includes all educational institutions and schools, experienced a concurrent decline, moving from 15.1% in 1997 to 6.6% in 2004. Today educational institutions in Australia receive ‘about one in twenty dollars’ of all money donated and they are on par with environmental and animal welfare groups (Australian Council of Social Service, 2005). Further, it has been suggested that bequest income will possibly grow in the forthcoming years (Routley *et al.*, 2007). Schervish and Havens (1999) predict that the intergenerational wealth transfer between 1998 and 2050 will amount to around \$41trillion dollars in the US with a minimum of \$6 million dollars bequeathed to nonprofit organisations. Considering the opportunity that exists for universities, ‘the topic of charitable bequests, remains grievously under-researched’ (Routley *et al.*, 2007 p. 194). Thus, any work that adds to the knowledge of bequest giving to universities in Australia is beneficial to practitioner audiences and researchers.

## **Background**

In comparison to the diverse literature on giving behaviour, relatively few studies have focused on bequests. As noted by Sargeant *et al.* (2006a) one would suspect that the motives for giving (or not) at the end of life would be somewhat different from motives for supporting a cause during ones lifetime.

To date studies have suggested there are a number of variables affecting whether individuals will leave a bequest to a charitable organisation. Several authors suggest that the wealthier are more likely to leave bequests and leave proportionately larger amounts (Havens and Schervish, 1999; Sargeant *et al.*, 2006b). Chang *et al.* (1999) using data from the 1992 US Gallup National Survey of National Giving and Volunteering found those most likely to bequeath had resided in the same residence for 2-9 years, were unmarried, self-employed, non-Jewish white males, who were committed to charitable organisations and the reduction of suffering of others.

Many individuals appear significantly more likely to leave a bequest if they identify with the cause or have an affiliation to the charity (Richardson and Chapman, 2005; Sargeant and Hilton, 2005). Sargeant *et al.* (2006a), however, suggest that it is often difficult to identify and target bequest donors from an organisations data base which may suggest that affiliation, often reflected in annual giving, may not in itself be sufficient indication of those most likely to pledge. Earlier research carried out with a Northwestern University reinforces this finding. In this study researchers found that alumni gift giving during a person’s lifetime was not a sound indicator of those most

likely to leave a bequest (Lindahl, 1991 as cited in Lindahl and Conley (2002). For this group, the study disclosed two distinct streams of major donors: those that build on their giving and provide a major gift in their latter years; and those that give a major deferred gift later in life irrespective of their past giving behaviour.

It is also clear, however, that there are many other variables that influence the decision to leave a bequest. Whilst the effects of estate taxation benefits and their relevance to bequest giving have attracted some interest in recent years, there appears to be mixed opinions on the level of motivation these play in the final giving decision (Brown, 2003). Ryan (1997) suggests that rather than being a significant factor in the motivation to give it is more a key factor in determining the size of the bequest. The majority of these studies have utilized data from US tax returns and therefore fail to address the individual's motives for giving (Chang *et al.*, 1999). There are, however, some considerable differences in nonprofit bequest taxation incentives between Australia and the US, (examples include avoidance of estate duties; charitable remainder trusts and the leaving of a retirement fund or life insurance), all of which are seen as a major issue in terms of the generous support of higher education in the US compared to Australia (Holmes, 2002).

Boskin (1976), however, has identified that the decision to leave a bequest, or the size of the bequest, is influenced by the individual's initial wealth, age, marital status, labour income, savings and the tax rules that affect the price reduction created by the bequest deductibility (Boskin, 1976). This author found that married people (a surviving spouse), and younger people (financially dependent heirs) bequeath less to charity than older or wealthier individuals with financially secure heirs. Auten and Joufaian (1996) found similar results when they matched the tax records of older wealthier parents with those of their children. They found that as the children became more financially secure the parents increased their charitable giving. With respect to bequests, however, they were unable to conclude that the same correlation existed; in fact they suggest that the children's income may only have a small influence on the parent's charitable bequest decisions.

More recent research with members of bequest societies and legacy clubs in the US found that tax considerations and family need, albeit instrumental in their decision to leave a charitable bequest, were not the only factors considered by pledgers (Sargeant *et al.*, 2006a). This study identified a number of 'general' individual motives that may influence bequest giving. These include altruism and affinity with the cause,

reciprocation for services received the performance and professionalism of the nonprofit organisation and the quality of communication. Sargeant *et al.* (2006a) also notes a number of 'specific' motives; these include lack of family need, spite, the avoidance of estate taxes, the need to live on and the desire to continue the work of the charity.

The only study the authors were able to identify pertaining to bequest barriers was that of Sargeant *et al.* (2006a), these authors through a series of focus groups with members of bequest societies found that cost, inconvenience, lack of time/lethargy, insensitive marketing and insufficient funds to make a difference could deter potential bequest donors.

Prior studies on bequest giving behaviour have made a considerable contribution in respect of the motives for bequest giving; however, there has been less emphasis on the barriers. When compared with the USA, Australian research on bequest giving behaviour is somewhat limited. More noticeable is the lack of research related to bequests to higher education institutions. This exploratory study sought to gain insight into barriers to Australian University bequests, thus addressing these gaps.

## **Method**

The methodology chosen for this research was a qualitative multiple case study using within-case and across-case analysis (Yin, 2003). As noted by Yin (2003, p1) 'the case study is used in many situations to contribute to our knowledge of individual, group, organizational, social, political and related phenomena'. To maximise the opportunity for comparable analysis, purposeful sampling was used in the recruitment of participants (Patton, 2002) to ensure a more holistic view was obtained as recommended by Sun (2005). The study was designed to explore the factors that may inhibit people from considering bequests to universities. The questionnaire included 33 semi-structured, open-ended research questions developed from the bequest literature (examples include Clotfelter, 2001; Sargeant and Hilton, 2005; Sargeant *et al.*, 2006a,b) to identify the participants' attitudes to bequest giving to their universities. The overall objective was to identify those triggers that either encouraged or impeded alumni bequests.

These were standardised, asking each person the same set of questions in the same order. This approach ensured the interview remained focused and enhanced the ease of finding and comparing individual and group responses (Patton, 2002). The average duration of the six interviews was seventy five minutes and interviews were recorded.

Recorded interviews were transcribed and a total of 43 pages or transcripts were analysed. The analytical techniques used in this research followed a staged approach proposed by Patton (2002) and also described by Yin (2003). First, the transcribed text was analysed by case and meaningful statements were grouped into categories. The second stage was to look at the narrative text and use constant comparative methods 'to group answers...common to questions [and] analyse different perspectives on central issues' (Paton, 1990 p.376). The data was then coded into categories and sorted into specific units. Then using a 'cut and paste' method to maintain accuracy of the recorded material, the transcripts were sorted by category across cases. Separate files according to category were established and these were stored for ease of retrieval and final comparison across all interviews (Yin, 2003).

The participants in the study represented a range of different industry sectors, universities and educational disciplines. Five of the six participants held post-graduate qualifications and one was currently completing an MBA degree. For ethical reasons the identity of the respondents will remain confidential.

This study focused on identifying the potential barriers to bequest giving for Australian Universities. The results are now presented. All respondents had made a will and only one had made a bequest to a nonprofit organisation. This research identified the lack of active engagement by universities with their student bodies from the outset of their academic tenure as the, principle, overarching factor in the dearth of subsequent bequest giving motivations.

### **Potential bequest barriers**

Five barriers to bequests were clearly evident in this study. These were lack of alumni engagement, intergenerational wealth transfer, charitable social confidence, confidence, trust and professionalism and communication will be discussed in turn. These were classified into one primary barrier, namely engagement and four secondary barriers.

## **A primary bequest barrier: A lack of alumni engagement**

Respondents illustrated that a ‘mere’ connection with the university is insufficient as a philanthropic trigger.

*‘I have no “umbilical connection” with the university and I’m not sure what percentage of people do have a tremendous umbilical connection. Whatever contact I did have was positive - but it was minimal’.*

*College Director, Bachelor of Arts, Bachelor and Masters of Education*

Respondents acknowledged that the lack of early engagement, which they defined as integration into the institute’s environment (or lack thereof), was a primary barrier to bequest giving. As one respondent stated:

*‘...it didn’t engage us for long...when it comes to doing a bequest...the university’s not one of the first places you think of’.*

*Pharmacy owner, Bachelor of Pharmacy*

Respondents that had studied part-time expressed an even stronger sense of disassociation:

*‘I never got the opportunity to become part of the university clubs and university unions...I guess I was not considered one of their ilk’.*

*Part-time secondary school teacher, Bachelor of Laws*

Interestingly, and in contrast to the lack of engagement with their university, a number of respondents identified more strongly with their professional bodies and organisations, an affiliation often formed and developed during their university tenure. Respondents indicated they were more likely to consider a request for a bequest from their professional body than they were to consider a University request. One respondent suggested her future professional organisation played a greater role in student relations than that of her academic unit at the time:

*‘The [Professional Organisation] students’ Association – in conjunction with the [Professional Organisation] – organised speakers to come and talk to us about future careers etcetera’.*

*Pharmacy owner, Bachelor of Pharmacy*



Respondents indicated they had stronger affiliations with private secondary schools than they did with their University. One respondent stated:

*'...they're constantly keeping you up to date with what the school is doing – this is what we are doing, please feel free to participate – the strength of the school is in that network, and which is where, I have to say, I have been quite disappointed with my old university's alumni'.*

*Pharmacy owner, Batchelor of Pharmacy*

Several respondents felt that the example set by private secondary schools in their engagement of and communication with parents and students reduced the barrier to bequest consideration *'because they have actively engaged us, we're impressed – and they're the sort of school you would leave a bequest to'*. These sentiments stand in stark contrast to those expressed by many respondents who viewed their university experience as more of a material process, or a *'means to an end'* rather than the formation of a relationship.

*'It goes back to how well you identify with the university, and to me it's almost like I went in and went out - it educated me'.*

*Physiotherapy practice owner, Bachelor of Physiotherapy*

### **Secondary bequest barriers**

Secondary bequest barriers consistent with those identified previously in the literature (see Sargeant *et al.*, 2006a) were also identified in this study, including factors such as intergenerational wealth transfer, trust and professionalism and quality of communication. Secondary barriers to university bequests offer additional insight into the factors that can deter potential donors. These include, lack of early engagement, professional allegiances, private school affiliation and charitable social conscience. Each factor will be discussed briefly in turn.

### **Intergenerational wealth transfer**

Most respondents indicated that their first priority was to look after their family, as the following participant states:

*'I have fairly strong views that [what] my wife and I have gathered over our life will go to our children and stay within the family – family comes first'.*

*National Human Resource Manager, Bachelor of Business*

This concern for family security was paramount, and only if and when this was seen to be fulfilled would there be any consideration of a bequest outside the family.

*“as time goes by, and the children become more self sufficient I can imagine – that we will change our wills as to how we will distribute our bequests*

*National Manufacturing Sales Manager, M.B.A*

### **Charitable social conscience**

A number of respondents alluded to the notion of social responsibility. The concern for the suffering of others and the need to contribute to longer-term change was seen as a strong motivational factor. Some appeared to identify strongly with ‘the cause’ whereas others felt the need to express gratitude to an institution which had played a key role in their lives. All respondents indicated that they would make a bequest to a charitable organisation ahead of tertiary institutions. The underlying motivation behind these decisions was the trust and respect for the work of the charities undertakes:

*‘ Medicine Sans Frontieres for some reason or another can get into places quickly – so I know that the money is, will be utilised quickly’.*

*Pharmacy owner, Bachelor of Pharmacy*

### **Confidence, trust and professionalism**

The most commonly stated concern was the respondents ‘lack of confidence and trust in the universities’ transparent and effective management of bequest funding. One respondent suggested that some universities, particularly larger ones, had benefited greatly from alumni bequests in the past and questioned whether this money had been wisely invested:

*‘... it’s got to the stage now where you don’t know who’s benefiting from the ongoing value of those bequests - there are more facilities there than any student could really possibly use, it’s more like a country club than a university, and I wouldn’t give to someone like that’.*

*National Manufacturing Sales Manager, MBA*

The professional management of bequests, and the perceived outcomes from the use of those funds proved equally important with almost all respondents; a common thread in most responses expressed by one that said:

*'I would hate to think I was giving money just to increase the chancellor's salary or something like that'.*

*Pharmacy owner, Bachelor of Pharmacy*

This exemplifies the need for reassurance and accountability in terms of bequests to universities, and the donor's personal interest in outcomes attained through the gift, as one said

*'I wouldn't want to see a bequest frittered away on something silly - to give to a university [with] absolutely no knowledge of the real world and how it operates - I wouldn't want my bequest to go to people like that - who wouldn't spend it wisely: I'd want to ensure it was utilised'.*

*National Human Resource Manager, Bachelor of Business*

Another said, *'I think knowing how they were actually going to use it would be the bigger motivator for me'*. The only respondent in the study to have made a firm charitable bequest suggested that ongoing personal contact and his ability to monitor the use of the organisation's funding had nurtured his trust in, and commitment to, the organisation:

*'...when I saw what the organisation was doing - having known what I know what happens in other so-called charities - I changed my mind. I knew that this was a genuine one'.*

*Part-time Secondary School Teacher, Bachelor of Laws*

It was interesting to note that, regardless of such strong sentiments about the transparency of funds, the majority of respondents rejected any suggestion that the provision of documentation, such as annual reports, would add reassurance about the allocation of donated funds: *'No, no not really interested'*. These findings contrast with research which suggests that annual reports provide both a functional and symbolic role and contribute to improving stakeholder and community perception of public fundraising accountability (Flack, 2007).

## Communication

Many respondents revealed that contact of any kind, were and is singularly lacking in their university alumni associations '*...we used to graduate and never see them again – so that's how the university lost us, we were no longer engaged*'. Others suggested that minimal effort had been expended by their university or its alumni association in maintaining any prolonged contact, let alone actively engaging a relationship with them.

*'Well I used to get information, then I never got information any more, and it just withered on the vine as it were – ceased to contact'*.

*National Human Resource Manager, Bachelor of Business*

Several of the participants made reference to impersonal and inappropriate bequest solicitation.

*'...as it was the first contact I'd had with them – I was a bit cynical about it. I thought they just came outright and asked for a bequest – and I thought I really wanted to be in more contact with the university'*.

*Pharmacy owner, Bachelor of Pharmacy*

It was felt that given such a prolonged lack of engagement and contact any renewed attempt by their university to reach out to its alumni would be met with some scepticism '*if the university sent all of us a letter, would we be interested*'? In an effort to establish which key factors within an institution's solicitation program might influence the giving behaviour of alumni it was found that everybody felt strongly about what they didn't want or felt would not work for them, but almost none were able to indicate anything positive to the contrary.

*'I think we've gotta be really, really careful: do you wanna burn them off, or what do you wanna do? – it's gotta be contact that people really want'*.

*Physiotherapy practice owner, Bachelor of Physiotherapy*

The frustration evident in the respondents' lack of helpful feedback about practical, much less optimal, institutional communications clearly highlighted the inevitable consequences of a lack of early and sustained engagement as the following quote illustrates:

*'...yes they send stuff from the alumni, and I have a look at it, or they send asking for money, but that's about it...It would have very little impact on*

*me, so if it was [the university magazine] I wouldn't have remembered that, I would have put it in the bin'.*

*College Director, Bachelor of Arts, Bachelor and Masters of Education*

The alumni least likely to consider a bequest are those without direct affiliation with the university, as one respondent illustrates with the following comment:

*'I'd need to feel engaged with the university to leave a bequest – the university needs to stay engaged with its alumni'.*

*Pharmacy owner, Bachelor of Pharmacy*

## **Discussion**

This study contributes to the literature in two main ways. First, this study is the first to identify a lack of engagement with an organisation as a bequest barrier for Australian universities. Australian universities may not fully appreciate the importance of stewardship and donor cultivation in securing major gift donors. Our study certainly suggests there appears to be less emphasis placed on cultivating all potential donors, both during tenure and post-graduation. Practitioner and academic literature has stressed the value of organisation-donor relationships and suggest that organisations should invest in relationship management and develop strategies that benefit both parties (Thatcher, 2005; Walters, 2008; Worth, 2002). Second, this study is the first to propose a hierarchical bequest barrier structure. Each contribution will now be discussed in turn.

Prior studies (e.g. Sargeant et al., 2006 a,b) identified a range of demographic, motivational and organisational factors that contribute to bequest donation behaviour. This is the first study to suggest that a hierarchical structure may offer a better representation of bequest donation behaviour for certain types of non-profit organisations. In this study, a lack of engagement with their University was a primary consideration to a respondent's willingness to consider a marketer's request for a bequest to the university.

Without engagement during university tenure, respondents were not willing to consider a university bequest, and all other factors became secondary in any bequest giving behaviour. Almost unanimously across the respondents, these secondary factors were, in descending order of importance: family first, 'social justice' charities and loyalty to professional organisations; a number of respondents also indicated the strengths of private schools' calling.

This lack of early engagement as a primary causal factor had not been specifically identified in previous literature. The US educational experience supports this proposition where students are highly engaged. Dann (2008) suggests that higher education institutions have the advantage of establishing an environment that may contribute to deep and often personal relationships with both peers and lecturers, thus, setting the foundation for funding prospects long before they become funding prospects.

While individual barriers identified in previous research – cost, inconvenience, lack of time and lethargy – were not evident in this study we acknowledge these barriers are also likely to impede bequests to Australian universities. These barriers are general and are relevant to the making and changing of wills. The only barrier consistent with the previous research was found to be insensitive marketing (Sargeant et al., 2006a). Unlike previous research, this study has sourced the views of members from a variety of university alumni and specifically addressed the issues of barriers to bequests to Australian universities.

The results of this study must be viewed in the light of key limitations. This was an exploratory study, which sought to explore barriers to bequests for Australian universities using a specific sample, which was small in size. The results of this study cannot be applied beyond Australian universities. This research should be extended in Australia and quantitative methods should also be employed. Further research is needed to extend our understanding of university bequest-giving barriers globally, with efforts required in the US, Canada, UK, Asia and Europe. Such endeavours would permit best practice to be uncovered and defined, offering guidance for university bequest marketers globally.

### **Implications for bequest marketers**

The results of this research have important implications for university bequest marketers and bequest marketers in similar organisations, e.g. high schools, colleges, professional associations. A lack of early engagement and sustained engagement will ensure that marketing efforts seeking to attract bequests will be dismissed and ignored. Two important implications arise. First, bequest marketers seeking to maximise bequest donations should identify and subsequently target alumni who were engaged with the organisation. Alumni need to feel engaged with an organisation in order to leave a bequest. Second, organisations need to take a relational view. Students should not be viewed merely as a transaction. Rather, universities seeking to increase bequests require

a long term strategy whereby student engagement is encouraged from the outset and maintained following graduation.

Recent surveys conducted across eighteen universities in Australia found that a number of universities were not actively seeking bequests but that others were displaying increased interest in their fundraising and alumni relations operations (Newton, McDiarmid, Scaife and McGregor-Lowndes, 2008). Universities need to enhance their engagement with alumni and devote time and effort to fundraising to maximise their potential to obtain new revenue streams (Business/Higher Education, 2006; Newton, McDiarmid, Scaife and McGregor-Lowndes, 2008).

The sentiments expressed by respondents in this study may not be easy to overcome. Previous research by Clotfelter (2001) suggests a strong correlation between the level of satisfaction during university tenure and the level of financial contribution and commitment to the university. As this author points out 'little can be done to change a central determinant of alumni giving: feelings of satisfaction about the undergraduate experience of decades ago'.(p.134).

The following alumni engagement model (figure 1) proposes how bequest marketers may be able to overcome the giving barriers identified in this exploratory study to maximise bequests. This model proposes an engagement continuum, from completely disengaged, at left, to fully immersed in the tertiary environment at right.

**Figure 1: ALUMNI ENGAGEMENT CONTINUUM MODEL**

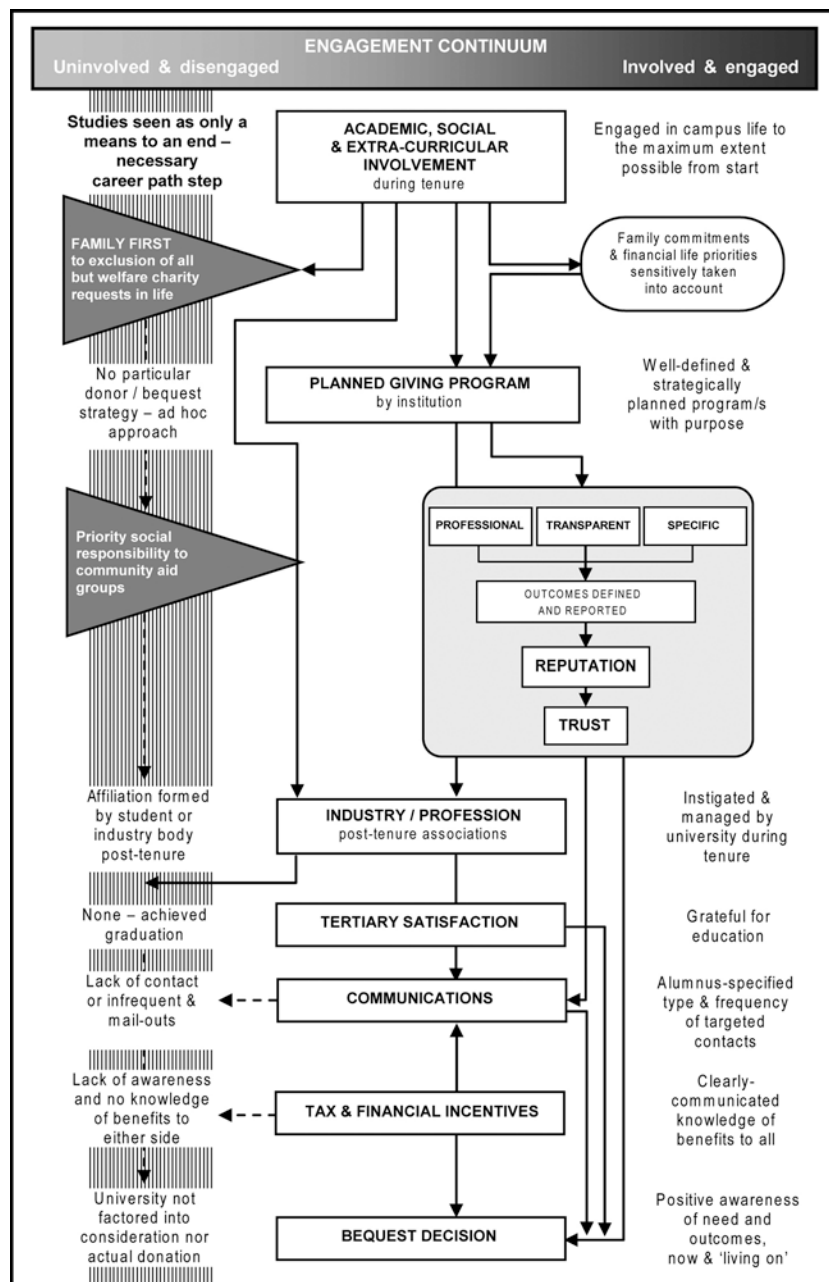


Figure 1. Alumni engagement continuum model

### Future Research

Future research is recommended to confirm the bequest structure proposed in this paper. This would require a longitudinal study design distinguishing between engaged and non-engaged student cohorts. Following graduation from University the response of cohorts to various donation and bequest inducements could be compared and contrasted. Based on the proposition set forth in this paper we would hypothesize that engaged students would respond more favourably to donation and bequest attempts than non-engaged students.



This research identified that engagement was a primary barrier to bequest motivation. Certain institutional practices are known to lead to high levels of student engagement (for examples see Astin, 1991; Chickering & Reisser, 1993). Institutional practices that lead to student engagement include student-faculty contact, cooperation among students, active learning, prompt feedback, time on task, high expectations, and respect for diverse talents and ways of learning. Also important to student learning are institutional environments that are perceived by students as inclusive and affirming and where expectations for performance are clearly communicated and set at reasonably high levels. Responsibility for student engagement is shared between all facets of the institution from faculty to administrators and institutional structures. Student engagement is benchmarked across North America (see <http://nsse.iub.edu/index.cfm>). Future research opportunities exist to benchmark Australian universities against their North American counterparts using instruments such as the NSSE to better understand the extent of student engagement in Australia. These endeavors would certainly assist Australian universities to understand how students can more effectively be engaged.

## **Conclusion**

The engagement continuum denotes a spectrum of student involvement, from completely disengaged, at left, to fully immersed in the tertiary environment, at right, and this continuum also establishes similar left-to-right transactions in the responses to, or outcomes of, the various elements identified. It is clear from this study's research, that early engagement in campus life is crucial to the development of a positive university experience and an ongoing bond, during and post-tenure.

The importance of a well-defined, strategic planned giving program is second only to early engagement of students by the university, and the key elements of the application of such a program are based on the findings of the literature review and research analysis of this study, sequentially grouped in the box on the right of the model.

Inescapable family financial priorities could be allowed to become an obstacle to the development of this relationship, as can the current higher-profile demands of community charities, but both can be factored into a cohesive and well-managed plan of early and ongoing alumni association; with care and strong foundation in a satisfactory tertiary experience, it is believed these will become factors rather than distractions.

Equally, it can be seen that it is important for universities to take charge of the education-profession interface, to ingrain the bonds established through student engagement and prevent industry and post-graduate associations taking over alumni loyalties. Concomitant with this is the continued management of social, networking and extra-curricular involvement by the university of its students, all of which should contribute to the sense of satisfaction with, and gratitude for, the tertiary learning experience.

The maintenance of appropriate ongoing communication, it is clear from this study, should not only be tightly-focused and personally-targeted, it should involve delivery channels and media most suited to each former student's personal and professional choices.

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