



Alumni participation : Greek vs. non-Greek
by Heidi Marie Sherick

A thesis submitted in partial fulfillment of the requirements for the degree of Master of Education in
Education

Montana State University

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Abstract:

The purpose of this descriptive study was to identify whether alumni who are members of Greek organizations participated more in alumni activities than non-Greek alumni. The development administrators at Montana State University did not know if alumni who are members of Greek organizations participated more in alumni activities, including Alumni Association membership, donations to the MSU Foundation and attendance at alumni events, than non-Greek alumni. Five different decades of alumni were studied to identify trends in alumni participation. The major source of information used in this study was data stored on the MSU Alumni Association database.

A total of 6,467 alumni from the classes of 1950, 1960, 1970, 1980, and 1990 were included in the population. The percentage of Greek alumni has decreased each decade, while the number of total alumni has increased every decade except from the Class of 1980 to the Class of 1990, which decreased by 175 alumni. There was a decrease in the percentage of Alumni Association members in the more recent class years. In each of the class years the percentage of Greek alumni who are members of the MSU Alumni Association exceeded the percentage of non-Greek alumni association members. As alumni population increased and the Greek participation decreased, the number of Greek alumni who were members of the Alumni Association also decreased. The same trend existed when the donors to the MSU Foundation were studied; there was a steady decrease in the proportion of Greek donors as well as a decrease in non-Greek donors over the five decades. Finally, the alumni who were members of Greek organizations participated in alumni events at a higher percentage than their non-Greek counterparts across all class years researched.

Although this study identified a steady decline of Greek alumni through the past fifty years, the principal conclusion from the study was Greek alumni at Montana State University participated at a higher rate than non-Greek alumni in alumni activities.

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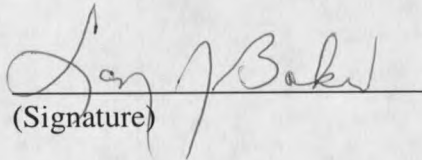
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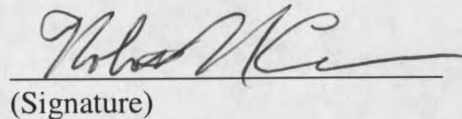
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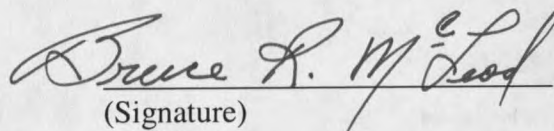
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ABSTRACT

The purpose of this descriptive study was to identify whether alumni who are members of Greek organizations participated more in alumni activities than non-Greek alumni. The development administrators at Montana State University did not know if alumni who are members of Greek organizations participated more in alumni activities, including Alumni Association membership, donations to the MSU Foundation and attendance at alumni events, than non-Greek alumni. Five different decades of alumni were studied to identify trends in alumni participation. The major source of information used in this study was data stored on the MSU Alumni Association database.

A total of 6,467 alumni from the classes of 1950, 1960, 1970, 1980, and 1990 were included in the population. The percentage of Greek alumni has decreased each decade, while the number of total alumni has increased every decade except from the Class of 1980 to the Class of 1990, which decreased by 175 alumni. There was a decrease in the percentage of Alumni Association members in the more recent class years. In each of the class years the percentage of Greek alumni who are members of the MSU Alumni Association exceeded the percentage of non-Greek alumni association members. As alumni population increased and the Greek participation decreased, the number of Greek alumni who were members of the Alumni Association also decreased. The same trend existed when the donors to the MSU Foundation were studied; there was a steady decrease in the proportion of Greek donors as well as a decrease in non-Greek donors over the five decades. Finally, the alumni who were members of Greek organizations participated in alumni events at a higher percentage than their non-Greek counterparts across all class years researched.

Although this study identified a steady decline of Greek alumni through the past fifty years, the principal conclusion from the study was Greek alumni at Montana State University participated at a higher rate than non-Greek alumni in alumni activities.

CHAPTER 1

INTRODUCTION TO THE STUDY

The participation in a Greek organization is an important aspect of college experiences for Greek alumni. Generally, alumni have only fond memories of their fraternity and think it played an important part in their development and subsequent success (Kuh, et. al., 1996). When asked where they are headed after the Homecoming football game – the majority of Greek alumni will say, “back to the house” (Harrington-Lueker, 1999). Alumni interact at reunions; acknowledging each other and identifying themselves by the fraternity or sorority to which they belong.

There are many benefits to participating in Greek organizations during the college experience. According to Kuh, et.al., fraternity leaders say, the grade-point averages of fraternity members on a campus sometimes exceed those of undergraduate men generally, evidence that fraternities contribute to academic performance (1996). Joining a fraternity helps newcomers adjust to college; without the experience of living in a close-knit, supportive group, many students would drop out. Fraternity life also helps give students a better understanding of people from different backgrounds and provides opportunities for leadership within the group that cannot be matched elsewhere on campus. As a result, fraternity men and sorority women are disproportionately represented among community and professional leaders. According to the Chronicle of Higher Education, more than half of the members of Congress are Greek alumni, as are

many congressional staff members ("Greeks Seek Tax Break for Donors," 1990).

According to Esther Thorson, lead researcher in a 1997 study conducted by the Center for Advanced Social Research at the University of Missouri, alumni who were members of a men's or women's fraternity or sorority tend to give more money to their colleges and universities than do other graduates. National Panhellenic Conference-National Interfraternity Conference Research Initiative studies have found this held true across generations from the 1945-era graduates through the 1994-era graduates.

Greek organization alumni from the 1945 and 1955 eras tend to make larger gifts than non-Greek alumni. Twenty-two percent of the fraternity/sorority alumni who graduated in the 1945 or 1955 eras said they gave \$500 to \$1000 in 1996 versus 4.2% among other alumni.

Gifts from alumni are often the bedrock on which higher education's fund-raising efforts are based. Alumni giving within the United States was a \$1 billion enterprise in 1980-81 and constituted nearly a quarter of total voluntary support of higher education. (Nelson, 1988) Yet, less than one alumnus in five participated in an annual appeal campaign. Clearly, alumni support has been only partially developed as a source of institutional support.

In the 2000 fiscal year, the overall alumni giving rate for graduates of all types of colleges was 18.9 percent, according to the Council for Aid to Education, a nonprofit group that tracks education philanthropy (Pulley, 2001).

Nelson (1988) noted that identification with a cause or institution and associated feelings of appreciation, gratitude, or obligation were powerful motivators of charitable giving. In light of this, a far larger percentage of alumni should be providing financial support. Accordingly, it appeared that (1) positive retrospective view of alma mater and the undergraduate experience and (2) feelings of obligation and gratitude were, at best prerequisite but insufficient determinants of alumni giving.

If, through an increased understanding of the role of undergraduate experiences in shaping alumni giving patterns, the percentage of contributing alumni could be increased even slightly, the result would be hundreds of millions of additional dollars annually in support of higher education.

Alumni characteristics and attitudes have been studied since the 1920's, (Nelson 1988) although specific inquiry regarding determinants of alumni support and non-support began much later. According to Nelson, a strong relationship between alumni support and several of the undergraduate experiences was revealed in the literature. Specifically, it showed that involvement in extracurricular activities, participation in student government and Greek fraternity and sorority affiliation were particularly related to alumni support (Nelson, 1988).

In this chapter the overall problem and purpose of this study will be introduced. The local context of the problem will be presented, as well as how this problem relates to the literature on alumni participation. Additionally, the significance of the problem will be presented in relation to MSU and the larger context of higher education and Greek

organizations. Finally, specific definitions, assumptions, and limitations of the study will be discussed.

Statement of the Problem

The problem is that Montana State University development administrators do not know if alumni who are members of Greek organizations participate more in alumni activities (Alumni Association membership, attendance at alumni events, and donations) than non-Greek alumni.

An increased understanding of the relationship between undergraduate values, orientations, and experiences and subsequent alumni support or non-support should suggest ways in which the undergraduate experience can be shaped or enhanced in the future to increase the likelihood of subsequent alumni support.

There are several areas of importance to this study for Montana State University and development officers in higher education. First, it is important to identify alumni who are willing to get involved whether it be as a member of the Alumni Association, attending an alumni event, or giving to the annual fund. Targeting alumni groups, such as members of Greek organizations, is important because alumni participation is becoming more significant in university development to compensate for the lack of state funding and the lack of resources. Because there are more than 50,000 addressable alumni on the MSU Foundation database it is imperative that we find opportunities to streamline the efforts and make the work more efficient.

According to Kuh, et. al. (1996) almost monthly, a college or university fraternity made the national news because of an escapade of underage drinking or a hazing episode

resulting in injury or worse. These images tarnished the image of fraternities as a locus of brotherhood (Kuh, et, al, 1996). If the hypothesis of this study was supported; that Greek alumni are more likely to be involved with the University after graduation, it would be a significant argument to the skeptics that do not think Greek organizations are beneficial to the University.

Purpose of the Study

The purpose of this descriptive study was to identify whether MSU alumni who are members of Greek organizations participated more in alumni activities than non-Greek alumni.

Nelson (1988) stated man's charitable instincts could be explained by four fundamental concepts – two universal aspirations and two basic motivations. The first aspiration was that of being sought after – people needed to feel wanted, important, and cared for; the second aspiration was the desire for worthwhile membership in worthwhile groups – people needed to have meaningful associations, to have belonged to and added their share toward the advancement of groups with which they identified. The first basic motivation was pride in association – people supported that of which they were a part. The second responsible concern for continuity – a basic concern for posterity and that all of a person's work must be built upon and continued.

Nelson (1988) also cited a more complex paradigm, suggesting seven motivation forces linked to charitable giving: religious beliefs, guilt, recognition, self-preservation and fear, tax incentives, obligation, and solicitation pressure. According to the study by

Nelson (1988) a committee consisting of representatives of not-for-profit institutions structured and then elaborated upon three large clusters of motivational factors: (1) historical, philosophical, and religious factors; (2) sociological and psychological factors; and (3) legal and economic factors.

Finally, Nelson (1988) referenced seven psychological obstacles which must be surmounted before individuals will give: Ignorance of how to give and of how to feel after a gift was made, fear of parting with the security money provided, fear of surrendering the sense of power money provided, fear of being forgotten once a gift was made, fear that a gift may not have been used in the way intended, and fear that once a gift was made, the recipient will ask again.

When students were involved on campus they usually were more likely to feel connected to the university and to stay connected after graduation. Sororities and fraternities provided for a social network for students. It can be argued that it was undergraduate involvement in extracurricular activities that provided the student with an increased understanding of and familiarity with his or her school (Nelson, 1988). That is, in the normal pursuit of official duties and their organizations' interests, these involved students learned about their school – its history and traditions as well as its operational procedures, policies, programs, and personnel (Nelson, 1988). Nelson's 1988 study served to confirm that undergraduate extracurricular involvement was closely related to subsequent alumni support.

Statement of the Question

The overall question of the study was: Have Montana State University Alumni in the Classes of 1950,1960,1970,1980, and 1990 who were members of Greek organizations participated in alumni activities (Alumni Association membership, attendance at events, and donations) more than non-Greek alumni? The research hypothesis was that Greek alumni participate in alumni activities at Montana State University (Alumni Association membership, attendance at alumni events, and donations to the MSU Foundation) more than non-Greek alumni. The specific questions asked in this study were:

Do Montana State University alumni in the Classes of 1950, 1960, 1970, 1980, and 1990 who are members of Greek organizations participate as members of the Alumni Association at a higher percentage than nonmembers of Greek organization?

Do Montana State University alumni in the Classes of 1950, 1960, 1970, 1980, and 1990 who are members of Greek organizations give to the MSU Foundation more than non-members?

Do Montana State University alumni in the Classes of 1950, 1960, 1970, 1980, and 1990 who are members of Greek organizations participate more in alumni events than non-members?

Rationale

After working in the Alumni Association as the assistant director for four years it became apparent this information was unknown. Because of declining state funding and rising costs for institutions of higher education, support from alumni was of major interest to university administrators, alumni associations, university advancement officials and other stakeholders (Hanson, 2000). Gifts from alumni were becoming more important in sustaining revenue streams for institutions of higher education. In addition, alumni supported their alma mater by recruiting new students and promoting the institution to others. Understanding more about the attitudes that underlie the relationship between alumni and their alma mater provided insights useful to university and alumni relations in building and managing the future of their institutions.

The alumni involvement was information important to know for university development, Alumni Association planning, and strategic fund-raising efforts. Therefore, alumni participation was investigated in three different ways – Alumni Association membership, giving to the MSU Foundation, and participating in Alumni Association events. It was valuable to compare the participation over several age groups in order to identify how and when MSU alumni are involved in their alma mater.

Introduction of the Study

Background

The institution that served as the setting for this study was Montana State

University – Bozeman (MSU) – a public, Land Grant institution founded in 1893. The Greek System was established at MSU in 1911 when five young men formed Delta Chi, the first local Greek letter fraternity. The second group, Kappa Nu was organized in March of 1912. The first social group on MSU's campus with a national affiliation was the women's sorority named Alpha Omicron Pi. The trend of national affiliation spread quickly, even to the already existing local fraternities. Eleven fraternities and six sororities were established between 1917 and 1965 (Burlingame, 1968). Over the past several years chapters have closed at Montana State because of lack of participation. In 2001 there were 4 sororities for women students and 8 fraternities for the men. According to Beverly Townsend, MSU Greek Coordinator, about 4.4% (approximately 460 members) of the undergraduate student body are members of the Greek organizations.

Importance of the study

It was important to identify alumni who were willing to get involved whether it be as a member of the Alumni Association, attending an alumni event, or giving to the annual fund. Targeting alumni groups, such as members of Greek organizations, was important because alumni participation was becoming more significant in university development to compensate for the lack of state funding and the lack of resources. Because there were more than 50,000 addressable alumni on the MSU Foundation

database it was imperative that development administrators find angles to streamline the efforts and make the work more efficient.

The results of this study can also be significant to the Greek system at Montana State University. The Greek coordinator found herself justifying the value of the Greek organizations on campus at Montana State. Many of the problems and conflicts of members of fraternities and sororities received high publicity nationally, while the “good” things, like the hours of community service, philanthropy projects and campus involvement were less controversial, and therefore not as publicized. This study may provide data to help convince the administration and community that fraternities and sororities are a healthy, contributing part of the University.

Definition of terms in the study

Alumni – persons who has attended or been graduated from a school, college, or university.

Involvement - to occupy the attention of, to bring into connection. For this study, it refers to participation in alumni events, membership in the Alumni Association, or giving to the Annual Fund.

Greek – a member of a Greek-letter fraternity or sorority.

Non-Greek – not a member of a Greek-letter fraternity or sorority

Annual Fund – fund raising efforts including telemarketing, and direct-mail for gifts that are sought to provide operating support for an organization on an annual basis

Affiliation – to connect or associate oneself, join.

Alumni Association Membership Dues – a fee for programs and services

Annual Giving – Gifts that are sought to provide operating support for an organization on an annual basis.

CASE – Council for Advancement and Support of Education. CASE is an international organization comprised of approximately 3200 colleges and universities.

Fundraising – The seeking of gifts from various sources to support colleges and universities. In the literature, fundraising is often viewed as synonymous with institutional advancement.

Giving – The act of providing a gift to a person or an organization

Institutional Advancement – Encompasses activities designed to improve an institution's ability to compete effectively for available resources. One of the principle activities of institutional advancement is to raise funds for the institution.

Philanthropy – Voluntary action for the public good, which includes voluntary giving, voluntary service, and voluntary association (Payton, 1988).

RSVP list – A list of participants who have placed reservations to attend an event

Assumptions, limitations, and delimitations of the study

The assumptions and limitations of this study involved the data about alumni at Montana State University. The alumni database was dynamic; therefore it was difficult to maintain the ever-changing information. Another existing problem was that Greek

involvement was not coded for students by the Registrar's Office, which served as the source for the data transferred to the Alumni Affairs' database.

The Alumni Affairs' database had activity codes that allowed a data manager to assign a code to alumni who participated in different organizations, events, and donations. The data collected for the activity codes were either self-reported from the alumnus, obtained through pictures in the University's yearbook, the *Montanan*, or by membership lists provided from the different organizations. The Alumni Affairs' database also had the capability to store codes that identified members of the Alumni Association. Participation in alumni events was tracked by the RSVP list or by an alumnus self-reporting at the event by filling out an entry slip and participating in a drawing. Because these data were collected by self-reporting methods, they could be less reliable. The MSU Foundation managed the records of gifts. These data were managed by the Foundation on specific software but were also coded on the Alumni Affairs' database.

The overall assumption of this study was that because alumni from the classes of 1950, 1960, 1970, 1980, and 1990 participated in alumni activities they were more likely to have been connected to their institution, to have volunteered for an event, to have been Alumni Association members, and to have participated in the MSU Foundation Annual Fund than alumni who did not participate. The research hypothesis also assumed that there was more Greek alumni participation than non-Greek alumni participation because Greek alumni were more connected to the institution.

The major delimitation of this study was that it involved data from only one institution. All the participants in this study were alumni of Montana State University. Thus, the ability to generalize from these data was limited. Another delimitation was that the study involved alumni from 1950, 1960, 1970, 1980, and 1990. At an institution that had over 80,000 alumni over 108 year history the research targeted only alumni from 5 graduation years. The final delimitation involved the Alumni Association database. Alumni who had a record in the Alumni Association database were studied, which may not have included all alumni from the designated classes, nor may not have had all participation codes. This institution was studied because a similar study had not been conducted at Montana State University and the data were accessed more easily than working through most other institutions.

This study was limited by the accuracy of self-reported measures and the generalizability of the findings of this research beyond Montana State University to other college and university alumni.

Organization of the study

The remainder of the study included a literature review chapter, a methodology chapter, and a chapter that discussed the results of the study and a conclusion chapter.

The next chapter, containing the literature review, covered the criteria for selecting the literature and several themes, including findings, opinions, and methodology of previous research and the existing literature on this problem. This chapter also summarized the overall strengths and weaknesses, as well as gaps and saturation points

that were identified in the existing literature. Through this investigation avenues for further inquiry about the participation of Greek alumni in alumni events were identified.

An overview of the participants in the study, including population, method of selection of the population, and size and demographics of the population was outlined in Chapter three, the methodology. A description of the instruments used in the study and their validity, reliability and how they were developed was discussed. The description of the research design included rationale, procedure details, and the analysis strategy. This chapter concluded with a list of the assumptions, limitations, delimitations and timeframe involved in the study.

Chapter four contained the research findings, including the results of the data analysis (both numerically and non-numerically) and a discussion of the meaning of the results in terms of the participants and literature. A supplemental analysis in Chapter 4, included relationship to prior research, negative and positive findings in relationship to the hypotheses, weaknesses in the data and a resolution of contradictions, inconsistencies, and misleading elements in the findings. The results of the study were reported in this Chapter.

The final chapter of this study provided a summary and conclusions from interpretation of the results. Broader implications of the findings of the study were presented. Most importantly, the research answered the question and accepted or rejected the hypotheses. Finally recommendations for further research and implications of findings were discussed.

Chapter Summary

Gifts from alumni are the bedrock on which higher education's fund-raising dynasties have risen. With the number of alumni rising each year it was crucial for the University to pinpoint development efforts, identify indicators for institutional loyalty and involvement. Development efforts at Montana State have demonstrated the need for an understanding of potential donors. The Alumni Association was also in need of volunteers as the alumni base had grown larger and broader, spread throughout the country and internationally.

By keeping alumni informed, engaged and active in their alma mater, the institution can gain in several ways. Alumni provide the opportunity to carry on the reputation of excellent academics. Alumni can help recruit prospective students and help new graduates with career opportunities. Alumni who are in the working fields can provide knowledge back to the institution to help shape the curriculum and keep the programs at the cutting edge.

In the next chapter, the literature review supported a strong relationship between alumni participation and several of the undergraduate experiences. Specifically, involvement in extracurricular activities, participation in student government and Greek fraternity and sorority affiliation often manifested in increased financial benefit to the institution.

CHAPTER 2

REVIEW OF THE LITERATURE

Chapter Introduction

In this chapter a review of the pertinent literature on the topics of fraternities and sororities was presented, as well as, donor patterns, institutional and fraternity and sorority history, the history of fund raising in higher education, and trends in alumni giving and annual funds.

Criteria for Selection of the Literature

The search of the literature started with the research on alumni in fraternities and sororities. The pertinent research articles and books indicated that annual giving, fraternities and sorority membership, alumni associations and donor patterns, as well as trends in alumni giving, were crucial to the literature review.

Investigating the history of the institution and the history of fraternities and sororities was also included in the literature selection. The interface between the Montana State University Foundation and the Montana State University Alumni Association contributed to the background of the study. Similar studies provided beneficial literature and broadened the literature review.

Through interviewing the Greek coordinator and the Director of the Annual Fund at Montana State the research was directed to other literature, websites, and individuals that provided valuable and pertinent information.

History of fund-raising and alumni associations in higher education

In 1645, Harvard received its first gift from an alumnus – a garden plot for student use. In 1672, President Hoar wrote to friends and alumni of his plans for the college, cited its financial needs, and actively solicited contributions (Nelson, 1988). This event established the first mass solicitation letter.

By 1715, Harvard began printing an annual college catalogue, not so much to acquaint prospective students with the school's curriculum as to inform alumni and friends of financial needs and indirectly solicit their support (Nelson, 1988). This catalogue represented the first systematic attempt to cultivate and solicit alumni of an American college on a regular basis. By 1773, The Donation Book, a record of all substantial gifts to Harvard over the years, was published (Nelson, 1988). It reinforced existing alumni involvement through recognition, and became a powerful means of attracting new support. By this time the college had begun the practice of recognizing all supporting alumni at commencements, going so far as to honor major contributors with "laudatory orations" (Nelson, 1988).

By the mid-1700's most of the resource development techniques in use today had already appeared – information/solicitation brochures, periodicals, personal calls on prospective donors by presidents and trustees, appeal letters to alumni and friends, community-wide appeals, and many forms of public recognition for donors. In terms of other resource development innovations, the 19th century added little new and the 20th century added technologies such as the computer and the tax-exempt foundation (Nelson, 1988).

The alumni movement in support of higher education entered a new era in 1821 with the creation at Williams College of the first alumni association (Nelson, 1988). The group was organized for the purpose of intervening in a squabble between the school's president and board of trustees. Within the next ten years, however similar associations followed at Princeton, Yale, Miami, and Virginia, and the concept of Alumni Associations to help serve in development for the institutions was firmly established (Nelson, 1988).

Nelson (1988) noted two characteristics of these early alumni groups. First, alumni themselves organized them, not the colleges. On the contrary, most college presidents of the era were highly suspicious of the movement to establish the alumni associations. Second, the groups were originally intended to function as social or literary groups, not as a means of facilitating fund-raising among alumni. The role rapidly changed, however, as colleges came to realize the potential of alumni associations for gathering institutional support (Nelson, 1988).

During the second half of the 19th century, three forces converged to transform alumni interest in and support of higher education into the force it is today: the rise of alumni representation on boards of trustees, the demise of the classical curriculum, and the emergence of intercollegiate athletics (Nelson 1988). Of the three forces the rise of alumni representation on boards of trustees was the most pertinent to this study, however alumni participation relates to the other two forces as well. Prior to this time, the alumni

of a typical college rarely had more than token representation on its board of trustees. Yet, as Nelson (1988) documented, the earlier appearance of alumni associations and the increasing cultivation of alumni as a source of support inevitably led to their demand for a greater voice in institutional affairs. Beginning in 1865, and ending by the turn of the century, nearly every school was forced to adjust its trustee system. In many cases, alumni ended up with a majority on all board seats. As a result, their responsibilities in the ongoing search for institutional support further expanded and became more institutionalized (Nelson, 1988).

Early in the 20th century, three final elements in the composite of alumni support of higher education emerged – the alumni secretary, the annual fund, and the capital campaign (Nelson, 1988). He reported that by 1900 at least six institutions, beginning with the University of Michigan in 1897, had appointed alumni secretaries to develop and coordinate alumni relations and giving programs. Most schools followed suit within the next twenty-five years. In 1913, the Association of Alumni Secretaries was formed. In 1927, it merged with Alumni Magazines Associated and the Association of Alumni Funds to form the American Alumni Council, the forerunner of today's Council for the Advancement and Support of Education (CASE).

In 1890, Yale graduates created the Yale Alumni Fund, the first of its kind (Nelson, 1988). In doing so they operationalized the concept of regular annual support of an institution by its alumni. The Fund's growth was slow but steady, and by 1910, most schools with any alumni base at all had created a similar program (Nelson, 1988).

In his 1904 annual report, Harvard President Charles Eliot demonstrated the need for \$2.5 million to endow certain professorships and underwrite faculty benefits (Nelson, 1988). The alumni eagerly took up the challenge and the first organized, nation-wide capital campaign among a school's alumni was under way. The goal was met within one year – a phenomenal achievement at the time (Nelson, 1988). Dartmouth followed in 1908 with a \$4 million effort and Michigan, a relative newcomer to American higher education, raised \$1 million for a student union building in 1914-15. By the close of World War I, nearly all schools were in serious financial difficulty and forced to launch similar campaigns. In nearly every case, these efforts were characterized by extensive alumni involvement and financial support.

During the 1990's, philanthropy to higher education was strong. The total amount of private giving in 1998-1999 was \$20.4 billion dollars, which was twice the \$10.2 billion total reported in 1990-1991 (Lively, 2000). The decade was characterized by megagifts. Gifts of \$100 million or more were reported by 27 institutions of higher education (Lively, 2000).

The value of private gifts to colleges and universities in the United States during 1998-1999 increased at the fastest rate since 1986-1987. Attributed to a strong U.S. economy, rising stock market, and the popularity of planned giving, total donations to higher education increased to an estimated \$18.4 billion in academic year 1998, up from \$16 billion in 1997 (Pulley, 1999). The 15% increase follows three years of double-digit percentage increases. Based on information received from 1,034 colleges and

universities, the amount of giving increased at most types of institutions, according to the report, "Voluntary Support of Education," by the Council for Aid to Education.

The increase in gifts to higher education in 1998 represented a broader trend in philanthropy. Americans gave a record \$174.5 billion to various non-profit organizations, including colleges and universities, according to "Giving USA 1999". The total represents a 10.7% increase over the previous year. The generosity of contributors resulted in fund-raising records at institutions of many types. Harvard University led all institutions with \$462.7 million, up from \$427.6 million in 1997 (Pulley, 1999). Harvard also ranked first in alumni giving and in giving by individuals other than alumni. Other institutions, which reported record years in 1998, included Duke University (\$254.8 million), Michigan State University (\$72.1 million), the University of Missouri at Columbia (\$36.2 million), and the University of North Dakota (\$14.4 million) from 12,757 new gifts. In addition the University of North Dakota announced a record gift of \$100 million from Ralph Engelstad (Pulley, 1999).

There was a steady rise in private giving to institutions of higher education the 1990-1999 decade. Since 1993, private gifts to institution of higher education increased by 64.3% or 44.7% when adjusted for inflation (Pulley, 1999). Many of the individuals who donated to colleges in 1998 had more personal wealth available to give. Federal tax law made charitable giving attractive to investors who made money in the dramatically positive markets of the 1990s. As fortunes were created in the stock market, gifts to colleges and universities increased accordingly. In 1998, nine colleges and universities reported individual gifts or pledges of \$50 million or more, including Vanderbilt

University, which received a \$300 million gift of stock from the Ingram Charitable Trust (Pulley, 1999).

Although contributions to higher education from all sources increased during the 1990's, the most reliable source of funds to institutions of higher education continued to be alumni of these institutions. The total on \$5.93 billion in alumni gifts in 1999 constituted 29% of giving to colleges and universities (Lively, 2000). Giving from alumni was up from the total \$3 billion in 1993, which represented 27% of the total giving.

Often gifts are received with stipulations attached. In 1998, institutions collected \$3.88 in restricted gifts for every \$1.00 in unrestricted gifts. In 1996, the ratio was closer to three to one (Pulley, 1999). Planned gifts were also an increasingly significant source of funds in 1998. Bequests and deferred contributions totaled more than \$1.5 billion, an increase of 30% over 1997 (Pulley, 1999).

Donor/alumni contributions

Annual Giving was best defined as support for the current operations of a college or university. In contrast, capital giving supported endowment or building programs (Higgins, 2000). At most colleges and universities, both unrestricted and restricted gifts for current operations were counted in the annual fund. Most professionals agreed that unrestricted gifts were the most desirable because they allow more flexibility in spending where money was needed (Higgins, 2000).

According to Higgins (2000), annual fund dollars flowed directly into the operating budget of a college or a university. This money helped support academic scholarships, purchased books for the library, provided salary for faculty, covered some administrative services or building maintenance, and helped to pay fuel and electricity bills. Annual fund dollars were needed for essential goods and services without which the academic enterprise would suffer (Higgins, 2000).

Development was concerned with establishing a strategic plan, improving the public relations of the school, marketing it, recruiting and retaining students, and securing support for a school in terms of human and financial resources. Development was much more comprehensive than fund-raising which often was a process started by reactions to negative immediate deficits (Higgins, 2000).

According to Higgins (2000), an annual giving campaign was a component of a total development program. It was an effort to get an annual contribution for the school from each person connected with the school community directly and indirectly (Higgins, 2000). In an annual giving campaign, everyone was viewed as a potential donor. An annual fund may not generate the most money and may not be the most cost-efficient form of fund-raising, but it was the foundation on which the development program was built (Higgins, 2000).

Higgins (2000) stated that by making the annual fund the starting point of the development program, the multiple purposes it served became clear. These purposes include, but were not limited to, achieving gift income, establishing a habit of giving, building relationships with students, alumni, faculty and community members, and acting

as a precursor of major gifts. He referred to five goals of an annual giving campaign. The goals were 100 percent school board (or trustees) participation; 100 percent faculty and staff participation; 100 percent family participation; alumni participation; and community participation. Percentages were not stated for alumni and community participation because it took years of annual giving drives before alumni and community members started to come around (Higgins, 2000).

Relationship Marketing

Survival was a major concern among institutions of higher education. Because of the dual specters of declining state funding and rising costs, institutions were increasingly using philosophies and techniques from marketing to generate adequate resources (Hanson, 2000). Given these conditions, support from alumni of institutions of higher education was of major interest to university administrators, alumni associations, university advancement officials and other stakeholders.

Gifts from alumni were becoming more important in sustaining revenue streams for institutions of higher education. In addition, alumni contributions took the form of volunteer assistance in recruitment, promoting the institution through word-of-mouth testimonials, fund raising, providing internships and career opportunities for students, guest lecturing on campus, committee work, participation in special university and alumni events, and financial donations. This alumni support grew out of the relationship between students and their institution of higher education. The unique relationship between students and their alma mater was both deep and enduring, yet it evolved over

time. Understanding more about the attitudes that underlie the relationship and supportive behaviors that grow from it provided insights useful to university and alumni relations personnel in building and managing the future of their institutions.

Marketing strategies can be developed based on the characteristics and attitudes of alumni. The plans and campaigns involving targeting and segmentation of alumni can aid an institution of higher education in attracting support in an environment of increasing competition for private and public resources. Key to these marketing strategies was the identification of factors that influence the relationship between an individual and the institution of higher education (Hanson, 2000).

Every generation of students, faculty, and administrators forged a unique and special attachment to their alma mater. The basis for this attachment might of been nostalgia or loyalty, appreciation based on later success, or simply the fact that the university experience played a prominent role in their lives (Hanson, 2000). Four conditions distinguished relationships (Hanson, 2000). First, relationships involved reciprocal exchange between active and interdependent relationship partners. Second, relationships were purposive, providing meanings to the persons who engage in them. Third, relationships are multidimensional, providing a range of possible benefits for their participants. Finally, relationships represented a process that changed and evolved across a series of interactions and in response to changes in the context in which they take place.

Relationship marketing was an approach that focuses on relationships as a basis for exchange, practice and academic research (Berry, 1995). In both theory and practice, relationship marketing focused on the benefits of maintaining a relationship with

customers beyond a utilitarian transactional exchange. Morgan and Hunt (1994) proposed that relationship marketing “referred to all the marketing activities directed towards establishing, developing, and maintaining successful relationship exchange” (p. 22). From a consumer-oriented perspective, marketing activities were performed with the intention of developing and managing long-term, trusting relationships with customers through relationships (Kotler, 1986). Long-term relationships can be developed with various stakeholder groups, such as customers, suppliers, and employees. In a university, the stakeholder groups included faculty, staff, students, future students, and alumni.

Relationships occurred over time, while transactions were isolated events (Fournier, 1998). Relationships constituted a series of repeated exchanges between two parties known to each other; they evolved in response to ongoing communications and to changes in the contextual environment. Most researchers adopted a model which included the phases of initiation, growth, maintenance, deterioration, and dissolution (Fournier, 1998). Each stage constituted one interval in a sequence of changes in both the type of relationship and the level of intensity (e.g., an increase or decrease in emotional involvement). Theories differed in the number of stages, the nature of the critical developmental events at each stage, and the mechanisms governing transitions between stages.

From the perspective of non-profit organizations, supportive behaviors were “behavior[s] that enhanced the welfare of a needy other, by providing aid or benefit, usually with little or no commensurate reward in return” (Bendapudi, Singh, &

Bendapudi, 1996, p.34). By considering the supportive behaviors toward nonprofit organizations as relational exchange, relationship marketing theory may be applied to non-profit organizations, while overlooking the relationship between the individual and the organization. Typically, research regarding supportive behaviors in the non-profit context examined monetary donation as the supportive behavior of interest. Several factors were studied to explain monetary supportive behavior for universities, including student demographics, alumni social involvement, and alumni attitudinal research.

Promoting an institution to others was a less tangible form of support with more indirect effects, which has been studied by scholars of non-profit organizations (Hanson, 2000). For example, alumni who promoted an academic institution to others were aiding in the process of recruiting new students to the university. This type of support was relevant to universities because the maintenance and/or growth of the student population were also vital to institutional survival. The role of alumni in the student recruitment process has not been the major focus of past alumni research, rather the focus has been on donations and financial support.

Past research focused on the long-term relationship between a university and its alumni (Hanson, 2000). This research typically employed student characteristics, alumni characteristics, and alumni attitudinal factors to explain supportive behaviors, and indicated that these factors determine the continuing relationship between the individual and the non-profit organization.

“With the nation’s new emphasis on cutting taxes and curbing government spending, governors and legislatures were reducing the budgets of state university

systems and, in the process, forcing the most radical reshaping of public higher education since its rapid growth in the 1960's" (Honan, 1995, p. 1). There was now a growing expectation that universities needed to raise more of their own money. Consequently, institutions of higher education were increasingly more dependent upon voluntary support (Odendahl, 1990: Leslie and Ramey, 1988).

Within the field of institutional advancement, it was generally acknowledged that the target portion of voluntary support for higher education came from individuals and the majority of these funds came from an institution's alumni. This concept was reinforced by the 1994-1995 results cited in Giving USA, an annual report on U.S. philanthropy, produced by the American Association of Fund-Raising Counsel Trust for Philanthropy. In this report, Demko (1996) stated, "Individuals provided 51 percent of all gifts to colleges. Alumni contributed the largest share of total donations --- 25 per cent --- while non-alumni individuals accounted for 23 per cent of contributions" (p. 31). It was also believed that the alumni population was seen as the area of greatest growth potential for generating external support for the university since the number of alumni continued to grow each year.

Therefore, colleges and universities were seeking to improve their ability and the knowledge base needed to keep the alumni connected and financially supportive of their alma mater. As the cost of communicating and soliciting alumni continued to increase, institutions of higher education were trying to identify which groups of alumni were most likely to respond favorably to a request for support. (Patouillet, 2000) A study conducted at the University of Pittsburgh indicated the alumni association members were

approximately three times more apt to give than nonmembers were (47% vs. 16%) and association members gave 25% more than alumni association nonmembers.

Financial contributions from alumni constituted the single most important source of voluntary support for higher education (Baade and Sundberg, 1996). Although alumni giving was the largest donor category within institutions of higher education, it still represented a source of income that had not been fully understood or developed (Baade et al., 1996). Understanding the factors that determine alumni generosity became more important as colleges and universities of all types relied more heavily on alumni support (Baade et al., 1996).

The ability to explain, predict and influence alumni giving behavior was important to fund-raising efforts in higher education. Therefore, a basic knowledge of donors' behavior and motivation was critical to the practicing fund-raiser (Leslie and Ramey, 1988).

Fraternity and Sorority History at Montana State University

Montana State University-Bozeman is a land-grant institution that was founded in 1893. The first fraternity originated in 1911 when five men formed the first local Greek letter fraternity; Delta Chi. A second group was formed in 1912, taking the name Kappa Nu. The first social group on MSU's campus with a national affiliation was the women's sorority named Alpha Omicron Pi. The trend of national affiliation spread quickly, even to the already existing local fraternities. Eleven fraternities and six sororities were established between 1917 and 1965. Burlingame (1968) stated in his book, "With the

slow growth of dormitories, it is difficult to see how the institution could have developed its distinctive spirit without the enthusiasm generated by fraternities, sororities and the various independent clubs. Those who predicted the divisive influence of Greek organizations had a valid background for their fears, since in many schools these did raise a caste system of wealth and exclusiveness. At Montana State, however, few students have had wealth, and those who did were often more frugal than those who did not.” (p. 100)

Burlingame wrote, “The house groups have steadily provided a solution to the enduring problem of securing the largest amount of gracious living at the lowest cost. These organizations have provided the spark of leadership in countless enterprises, both academic and extracurricular.” (pp.100-101)

The need to coordinate the efforts of Montana State’s social groups led to the organization of the Interfraternity Council in December, 1919, with representation from both men’s and women’s groups. The Panhellenic Council, for the women sororities, formed separately in 1924. Both councils worked together to provide a unified approach to what the 1964 *Montanan* described as “competition within a framework of cooperation.”

In 2001, there are 4 sororities and 8 fraternities in the MSU Greek system. The number of participants had declined over the past 10 years according to Bev Townsend, the Greek Coordinator. Although the numbers of participants were lower the fraternity and sorority members were still highly involved in leadership positions on campus, philanthropic projects, community service and academic achievement.

The following facts were reported in the latest issue of The UYEIA, Greek Wellness Leadership Newsletter, Summer 2001.

- MSU Greeks annually contribute 15,000 hours of community service.
- MSU Greeks annually raise \$15,000 for local and national philanthropy.
- MSU Greeks annually collect 9,000 pounds of food for local food banks.
- MSU Greeks are involved in over 75 campus clubs and organizations.
- Over 50% of MSU Greek women maintain a GPA of 3.0 or higher.
- Five of twelve MSU Greek chapters have been recognized as chapters of excellence by their national organizations.

Interface between Montana State University Foundation
and the MSU Alumni Association

The MSU Alumni Association was founded in 1903. Forty-four years later, in 1947, Roland R. Renne appointed Leon Johnson executive director of the new Endowment and Research Foundation (Rydell, et. al, 1992). In 1955, Renne named Johnson dean of the Graduate School, but continued his appointment as head of the Foundation, recognizing the strong link between the Foundation and graduate research (Rydell, et. al, 1992).

The Endowment and Research Foundation (ERF) was established in the late 1940s, but separated from the University in the 1970s (Rydell, et. al, 1992). A non-profit organization like the university, ERF assumed increasing significance as the repository for funds obtained outside of state support. That support was absolutely necessary

because there were no state monies allocated for scholarships, for visiting lectureships, for seed money to encourage new research and other creative activities, or to provide adequate funding for such important activities as rodeo, Shakespeare in the Parks, Theatre of Silence, and the Community Design Center (Rydell, et. al, 1992).

The extent of outside support was increasing impressively, roughly \$3.5 million in 1976 and then \$7 million in 1977. By 1980-81 it had reached a total of \$11.4 million - \$7.7 million going to support research and \$3.7 million to support other academic endeavors (Rydell, et. al., 1992). Without ERF, Montana State University and its students and faculty would have been deprived of important instructional and research opportunities, and the state of Montana would have been much the poorer for it (Rydell, et. al. 1992).

According to Rick Jackson, MSU Foundation, as of June, 2000, the MSU Foundation managed over \$70 million in assets, maintained accounting records for 956 restricted accounts, including 568 endowment accounts, and maintained donor and alumni records on approximately 115,000 individuals, corporations and other entities. The MSU Foundation continued to provide funds to the University to support student aid, faculty support, capital equipment and research. In 1998, the Executive Director, Tom Gelder recognized the growing need for focused fund raising in key academic areas and the MSU libraries. He hired Development Officers to represent each of the academic Colleges and the Libraries.

The MSU Alumni Association worked closely with the MSU Foundation. Both organizations were housed in the Foundation/Alumni Center. The alumni database was

shared by both entities, therefore, all donor information, alumni association membership information, address and demographic information, as well as activity participation information was shared. The information technology specialist served both the alumni association and foundation to maintain the database. All MSU Alumni Association funds were managed by the MSU Foundation, which also provided accounting services to the alumni office.

Finally, there were many interactions between the Development officers from each college and the staff of the Alumni Association as they planned events and cultivated alumni participation together.

Benefits of Fraternities and Sororities

In the literature there are many articles that scrutinized Greek organizations but there were also several articles that supported Greek organization involvement and the benefits of fraternities and sororities. In Tinto's studies on student retention he referred to students making a repetitive contact to other students in order to incorporate into the life of the college. Individuals in college were rarely provided with formal rituals and ceremonies whereby connectedness to one another was ratified (Tinto, 1993). Some institutions, especially residential ones, provided a variety of formal and informal mechanisms for that purpose. Fraternities, sororities, student dormitory associations, student unions, frequent faculty and visiting-scholar lectures, extracurricular programs, and intramural sports, for example, may all have served to provide individuals with opportunities to establish repetitive contact with one another in

circumstances which led to the possibility of incorporation into the life of the college (Tinto, 1993).

The term "integration" may be understood to apply both to the individual and to the particular sub-community of which he or she was a member. It was entirely possible for persons to perceive themselves to be socially integrated into a local sub-community, that was to see themselves as a member of a community, without sensing the same degree of membership in other communities on campus or of being a part of the dominant social mainstream on that campus (Tinto, 1993).

In any campus, especially the very large campuses that dotted the public sector, the existence of many smaller local communities, such as those found in and around fraternities, sororities, clubs, and organizations, served the important function of enabling new students to break down the university into smaller knowable parts where social integration was more readily possible (Tinto, 1993). Such small communities may have served to cut the large university down to size and thereby made eventual integration more likely (Attinasi, 1989).

One of the distinguishing marks of successful retention efforts at very large public universities was the focus on breaking down the campus into smaller, more knowable communities (Tinto, 1993). This arose in a great variety of ways in both the academic and social systems of the institution (Tinto, 1993).

Though fraternities and sororities were still an important part of the social fabric of university life and, in very large settings, a way in which students made attachments to their peers, their role had been somewhat curtailed in the past few years (Tinto, 1993).

Limits have been set which prevented those organizations from seeking pledges too early in their first year of college. In some cases, pledging could only occur during and after the second year. The point of doing so was not to prevent social attachments from being made, but to shield new students from the social pressures they felt to pledge during the first year and thereby freed them to discover the fuller range of social options that existed on campus (Tinto, 1993).

Alumni relations efforts have capitalized on connections to the institution. Kevin Wesley, the Alumni Relations Director at Bowdoin College in Brunswick Maine, said "For many alumni, fraternities are the connective thread that ties them to the institution" (Harrington-Lueker, 1999). On campuses with Greek systems, the close bond between fraternity and sorority members and their chapters could have made Greek alumni a natural and critical group to target, court, and otherwise involve in alumni relations efforts. Some research even suggested a direct link between Greek life and campus loyalty. According to a 1997 study by the University of Missouri's Center for Advanced Social Research, fraternity and sorority members gave more money and volunteered more time to their alma maters than non-Greek alumni (Harrington-Lueker, 1999).

Greek leaders volunteered in large numbers on alumni boards of trustees and councils, continuing the strong tradition of service they learned in their chapters (Harrington-Lueker, 1999). These alumni often served as chapter advisers and members of Greek house corporations, which were key roles in keeping their fraternity and sorority systems viable. According to Jaynee Drange Groseth, the Executive Director of the Montana State University Alumni Association, the Board of Directors of the MSU

Alumni Association currently consists of 12 (86%) Greeks out of 14 members on the board.

But in the last decade, a barrage of criticism and a series of high-profile tragedies have rocked the Greek system and led many colleges and universities to change their relationships with fraternities and sororities (Harrington-Lueker, 1999). These incidents and administrative responses have presented alumni affairs officers with difficult challenges to maintaining and strengthening relationships with Greek alumni. Opponents of the system charged the fraternities and sororities were rife with forms of abusive hazing as well as sexism and elitism, in addition to alcohol abuse (Harrington-Lueker, 1999).

As a result of such scrutiny, a number of college and universities imposed new campus regulations on fraternities and sororities, including rules on alcohol use, hazing, and rushing (Harrington-Lueker, 1999). A growing number of campuses also were working with national Greek organizations to pressure local chapters to curb high risk drinking, hazing and other abuses.

It was a challenge to reach out to Greek alumni amid these changes. The strong actions on the part of colleges and universities brought equally strong reactions from Greek alumni and required comprehensive communications and alumni relations efforts (Harrington-Lueker, 1999). For example, Pennsylvania State University was striving to keep its Greek system strong through the involvement of alumni. With 88 fraternities and sororities, the university had the largest number of chapters of any Greek system in

the United States. Nearly 13 percent of Penn State's 33,000 students and 400,000 alumni were members of Greek organizations (Harrington-Lueker, 1999).

While still prominent at many institutions, some alumni directors noted that Greeks generally were not the campus social center they used to be. Nationwide, there were about 400,000 male fraternity members, approximately a 24 percent decrease from 1991, according to Jon Williamson, executive vice president of the National Interfraternity Conference (Harrington-Lueker, 1999).

Lissa Bradford, chair of the National Panhellenic Conference, reported that sororities had not been growing as they were in the late 1980's, but their numbers had held steady. She estimated that the number of college-age members reached a current plateau of about 250,000 (Harrington-Lueker, 1999). Among the reasons for the lack of growth were rising chapter membership costs and changing demographics: Older students may not be attracted to Greek life, and working students may not have the time for chapter activities (Harrington-Lueker, 1999).

Abuses, accidents, and the increased regulation that follows were also contributing to stagnation, particularly for fraternities (Harrington-Lueker, 1999). Some campus Greek systems, rocked by a series of infractions and disciplinary actions, had seen fraternity participation drop and were contemplating the impact of future alumni relations.

At the University of Rhode Island, for example, sorority membership was doing very well, but the number of fraternities dropped from a height of 17 to 11 in the fall of 1999, according to Tom Dougan, assistant vice president for student affairs. The

university had asked some houses to leave for various reasons; others had closed due to lack of members (Harrington-Lueker, 1999).

Yet the campus' most involved alumni were those who attended URI when the Greek system thrived, Dougan noted, and historically, the university's data showed that Greek members participated at higher rates in alumni activities and giving than their non-Greek counterparts (Harrington-Lueker, 1999).

Abuse of alcohol was all too common among college students, whether they belong to a fraternity or not (George D. Kuh, Ernest T. Pascarella, and Henry Wechsler, 1996). Proponents of fraternities asserted few other student organizations provided such an impressive array of benefits for their members and the host institution, benefits that far outweighed the occasional problems. Hoover (2001) reported in a Chronicle of Higher Education article about scrutiny of Greek systems, "Fraternities and sororities are places to party, privileged societies with secret rituals, and bastions of the powerful whose alumni traditionally have shaped policy and fund raising at their respective institutions."

Greek Alumni Study

The Center for the Study of the College Fraternity published a monograph that discussed a study on the undergraduate experiences of alumni who supported their alma mater. The problem of this study was to determine whether alumni who financially support their alma mater shared certain types of undergraduate experiences and, if so, to construct a composite of those experiences (Nelson, 1988).

The Clark and Trow taxonomy, first publicized in 1966, distinguished four basic student subcultures that tend to define patterns of behavior, values, and relationships within the academic community – the vocational, the academic, the nonconformist, and the collegiate (Nelson, 1988).

Within the monograph the research question that was asked was, “In what types of undergraduate residences did alumni supporters live?” According to Nelson (1988) over 56% of respondents were members of fraternities or sororities and lived in Greek housing throughout a majority of their undergraduate careers. This finding was particularly noteworthy since Greeks constituted only 18% of the entire Indiana University undergraduate body during the twenty-five year period (1949-50 – 1974-75) of the study (Nelson, 1988).

The principal conclusion from the study was that alumni who financially support their alma mater did share in a specific type of collegiate experience as undergraduates (Nelson, 1988). The study yielded data useful in constructing a composite of the undergraduate values, orientations, and experiences of these supporters (Nelson, 1988). In general, these individuals had strong social and extracurricular orientations as undergraduates. They also placed considerable emphasis on the vocational or career preparation aspects of the collegiate experience (Nelson, 1988).

The findings of this study served to confirm that undergraduate extracurricular involvement was closely related to subsequent alumni support (Nelson, 1988). The explanation of this phenomenon could have been in the research of O’Connor (1961), who found that alumni donors possessed a better understanding of how their alma maters

function than do their non-supporting classmates. It can be argued that it was undergraduate involvement in extracurricular activities that provided the student with an increased understanding of and familiarity with his or her school (Nelson, 1988). In the normal pursuit of official duties and their organizations' interests, these involved students learned about their school – its history and traditions as well as its operational procedures, policies, programs, and personnel (Nelson, 1988).

Summary of the Literature

The review of the literature for this study ---the history of fund-raising and alumni associations, institutional history, interface between MSU Foundation and MSU Alumni Association, donor and alumni contributions, Greek alumni, benefits of fraternities and sororities, relationship marketing --- provided a comprehensive picture of alumni participation. While there were several assumptions verified in the literature, there was a lot unknown about student characteristics that help predict alumni involvement. In addition, the importance of fund-raising and alumni involvement in higher education were reiterated in the literature. The literature on Greek alumni also supported the assumption that Greek alumni were more apt to be social and active as alumni, as well as had a better understanding of the institution via their involvement on campus.

Weaknesses and Strengths in the Literature

One major shortcoming in alumni fundraising research was the absence of efforts that identified the characteristics of potential donors. Knowing the characteristics of

potential donors could increase the effectiveness of fund-raising efforts. Research that built on the existing base of empirical fund-raising research increased the availability of information to understand and improve fund-raising efforts and alumni-university relationships (Nelson, Jr., 1988).

In light of the significant role alumni played in support of higher education, it was noteworthy that until the 1960's little formal research had been conducted on the motivations, attitudes, and characteristics of alumni who financially supported their alma mater and of those who did not. The score of studies completed in the last twenty years yielded important but limited results. Taken as a whole, the research literature was fragmentary, inconclusive, and frequently contradictory. Factors that influence the alumni-university relationship should be isolated and identified.

Chapter Summary

In this chapter a review of the literature base for the study was provided. A synthesis of the literature on the history of fundraising and alumni associations, institutional history, interface between MSU Foundation and MSU Alumni Association, donor and alumni contributions, Greek alumni, benefits of fraternities and sororities, relationship marketing was provided. The criteria for selection of that literature were discussed, in addition to the weaknesses and strengths in the literature. In Chapter 3 a detailed description of the methodologies used in this study was provided.

CHAPTER 3

METHODOLOGY

Chapter Introduction

The problem addressed in this study was that Montana State University development administrators did not know if alumni who are members of Greek organizations participated more in alumni activities (Alumni Association membership, attendance at alumni events and donations) than non-Greek alumni. The purpose of this descriptive study was to identify whether MSU alumni in the classes of 1950, 1960, 1970, 1980, and 1990 who were members of Greek organizations participated more in alumni activities than non-Greek alumni in order to focus volunteer and fund raising efforts. The overall question of the study was: Do Montana State University Alumni in the above classes who were members of Greek organizations participate in alumni activities (Alumni Association membership, attendance at alumni events, and donations) more than non-Greek alumni?

Described in this chapter are the methodologies and rationale employed to explain the participation of Montana State Alumni, Greek and Non-Greek, in alumni events, the annual fund, and membership in the MSU Alumni Association. The target population of alumni for this study was described, and the rationale for the selection of the actual population of the study was explained. Detail was provided concerning how data were compiled from the Alumni Affairs database to describe

patterns of alumni participation in alumni events, in the annual fund, and membership in the Alumni Association.

Cohorts

All alumni in the MSU alumni database in the graduation years 1950, 1960, 1970, 1980, and 1990 were part of the population (N = 6467). This number was obtained from the alumni database, which stored information on alumni whose records were transferred directly from the Registrar's records after graduation. Alumni records were also added to the database when a person who did not receive a degree from MSU identified himself or herself as a former student.

At Montana State University, "alumni" were defined as people who have successfully completed one or more quarters/semesters. In order to obtain a cross section of alumni, five graduation years in different decades were targeted; the class of 1950 (N = 776), class of 1960 (N= 864), class of 1970 (N= 1390), class of 1980 (N= 1806), and class of 1990 (N = 1631).

When considering the research hypothesis of this study, a cross section of graduation years of alumni was chosen to study trends and effects of societal changes. In studying the alumni of Montana State University it was crucial to span several decades to analyze the differences in alumni participation patterns.

Data Source

Montana State University development administrators did not know if alumni who were members of Greek organizations participated more in alumni activities (Alumni Association membership, attendance at alumni events and donations) than non-Greek alumni. The participation data, including participation in alumni events, membership in the Alumni Association, and donations to the annual fund and major gifts were reported, as well as a description of the patterns of participation comparing the different decades of alumni. In addition, the societal factors affecting the participation of alumni and trends were identified. The three sources of information on the alumni database that were used are described below.

Activity codes: In addition to storing the name, address, phone number, business information, degree information, and giving data, the Alumni Association database stored information about activities an alumnus had participated in since college, as well as student organizations he/she was involved with while attending MSU. Examples of this information included whether an alumnus had participated in legislative efforts, purchased Montana State University license plates, or attended alumni events such as homecoming, reunions, or special events. The activity codes also identified whether an alumnus was involved in a student organization, for example a fraternity/sorority, honor society, or academic club while in attendance at Montana State.

Giving history/donor information: The MSU Foundation shared the same database as the Alumni Association and tracked the information on alumni financial contributions, including the annual fund and major gifts. The database stored records of amounts and dates of contribution as well as any additional pertinent information.

MSU Alumni Association Membership: There were two categories of membership in the Montana State Alumni Association; annual membership and lifetime membership. The annual membership expired after one year if not renewed. The cost of a membership was \$35 for a single, and \$50 for a couple. Lifetime membership dues were \$500 for single or for a couple and last for the life of the member. The Alumni Association database stored the information about membership status.

Data Characteristics

The following issues of reliability were considered when gathering and analyzing the data from the three sources. All three of the sources were derived from data stored on the MSU Alumni database. The database was dynamic because the information about alumni changed so frequently. Many alumni got married and had a name change or changed jobs, mailing addresses or e-mail addresses. Therefore, it was difficult to maintain the ever-changing data for over 80,000 alumni.

Activity Codes: The Alumni Affairs' database had activity codes that allowed a data manager to assign a code to alumni who participated in different organizations, events, and donations. The data collected for the activity codes were either self-reported from the alumnus, obtained through pictures in the University's yearbook, the Montanan, or by membership lists provided from the different organizations. The participation in alumni events was tracked by the RSVP list or by an alumnus self-reporting at the event by filling out an entry slip and participating in a drawing. Because this data collection method was self-reporting it could be less reliable.

Another existing problem was that Greek involvement was not coded for students by the Registrar's Office, which served as the source for the data transferred to the Alumni Affairs' database. Therefore, the only methods for identifying and coding Greek participation was through self-reporting or by identifying individuals in pictures presented in the Montanan yearbooks.

Giving history/donor information: The MSU Foundation managed the records of gifts. These data were managed by the Foundation on specific software but were also coded on the Alumni Affairs' database. Because these were the official records used by the MSU Foundation the data were considered to be valid and reliable. For this study, a minimum amount or frequency of the gift received from alumni was not distinguished. A donor was considered any alumnus who gave any amount of money to the MSU Foundation at any time.

MSU Alumni Association Membership: The Alumni Affairs' database also had the capability to code members of the Alumni Association. These were the official

Alumni Association records of each alumnus' membership status and were therefore, considered a valid and reliable record. The membership records were stored on the alumni database and were updated on a regular basis. The annual memberships were renewed yearly, while the lifetime memberships were one-time payments.

There were other issues of reliability that presented themselves as the data were collected. Participation in alumni events was coded by making reservation to attend an event or by filling out an "entry form" when at an event. Not only was this a self-reporting method but also several alumni chose not to fill out the forms even when they were attending. Other alumni may have made reservations for an event and then may not have attended the event.

Even though the data on Greek participation on the alumni database were crosschecked, there may have been alumni who had participated in a Greek organization but had not been coded on the database. As stated before, the information about which organizations alumni were involved in was not automatically loaded onto the alumni database.

There were different categories of alumni donations. The annual fund consisted of direct mail solicitation, phonathon, and the University appeal. Alumni also may have given to the institution through major gifts, company matching funds, endowments and estate planning. The cohorts used in this study were characterized as "donors", therefore, they could have given to the MSU Foundation via any of the preceding categories.

Consistency could affect reliability. Many times when dealing with different entities, different definitions existed for the same term, act or process. It was crucial in

the reliability of this study that the definitions used were agreed upon by each of the involved units.

Research Design

The research design involved analysis of the different graduation years and the different alumni activities. In order to understand the patterns of alumni participation it was crucial to compare the time from graduation. Trends in Greek alumni participation and non-Greek alumni participation were analyzed in the three different activity categories. Increases in enrollment and the decrease in membership in Greek organizations influenced the trends that were apparent in the data.

Procedure details

The study started with a review of the history books about Montana State University. The two primary sources were the Burlingame history and "In the People's Interest" (Rydell, et. al., 1992). Editions of the Montanans, or yearbooks, from the years being studied were used to crosscheck the database by coding for Greek involvement. Each Greek organization had a group picture published in the Montanan with members' names identifying the subjects in the pictures. Therefore, in the alumni database those names were coded with the Greek participation activity codes.

Jan Bosch, Director of the Annual Fund for the MSU Foundation was contacted to inform her of the problem, purpose and question of the study. Throughout the process Jan was interviewed about trends and resources involved with the annual fund and donor

data. Jaynee Groseth, the Director of the MSU Alumni Association and Ruth Austin, Information Specialist for the MSU Alumni Association were also contacted throughout the study procedures.

Beverly Townsend, the Greek Coordinator at Montana State was interviewed to identify resources and historical information about the MSU Greek system. Beverly provided key resources about Greek organizations including The Center for the Study of the College Fraternity and the Center for Advanced Social Research at the University of Missouri-Columbia. Many of the resources that contained applicable information were the Currents magazines, the Chronicle of Higher Education and Council for the Advancement of Secondary Education (CASE) publications. By browsing web sites and these publications relevant articles were found.

Queries were run to extract data from the alumni database and created a data set for the study. Separate queries were run for the 5 different years (1950, 1960, 1970, 1980, and 1990) and the 3 different categories (Alumni Association membership, donations to the MSU Foundation, and event participation). The data extracted from the alumni database were then organized on Excel spreadsheets.

Analysis strategy

In order to analyze the data the proportions of each graduation class that were Greek and non-Greek were calculated. The percentage of Greek alumni participation and the percentage of non-Greek alumni participation as members of the MSU Alumni

Association were then calculated. Next, the percentage of Greek alumni participation and the percentage of non-Greek alumni participation as donors to the MSU Foundation were determined. Finally, the percentage of Greek alumni participation and the percentage of non-Greek alumni participation in alumni events were calculated.

As the data were calculated for each category and each graduation year, it was apparent that trends existed. Trends in graduation numbers, trends in Greek affiliation, as well as trends in alumni participation surfaced.

The strategy used in analyzing the data was changed during the course of the study. At first, the percentage of Alumni Association members who were Greek, the numbers of donors who were Greek, and the number of event participants who were Greek were calculated. After further consideration it became apparent that for this study the percentages should reflect the number of Greeks who were members of the MSU Alumni Association, Greeks who were donors, and Greeks who participate in alumni events and compare those percentiles to the percentage of non-Greek participation in each of those activities.

Assumptions

The overall assumption of this study was that alumni from the classes of 1950, 1960, 1970, 1980, and 1990 who participated in alumni activities were more likely to be connected to their institution. It was assumed that through this greater connection to the institution, these alumni would be more likely to serve as volunteers and to make donations to the institution. It was also assumed that there was more Greek alumni

