

Donor Relation and Income Diversification Strategies of a Diocese in the Philippines

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ABSTRACT. Religious organizations, particularly in the Philippines, face financial challenges and require effective resource mobilization strategies to ensure sustainability. This study investigates donor relations and income diversification strategies within a Philippine diocese, examining funding policies, relationship management, donor influence, and income generation to address financial sustainability challenges faced by religious organizations. It analyzes these strategies through a descriptive-comparative design, utilizing data from 128 clergy and Parish Pastoral Council members. Findings reveal significant differences in perceptions between these groups regarding donor relations and income diversification, highlighting the need for collaborative approaches to financial management. This research contributes to understanding resource mobilization in religious organizations and offers practical insights for enhancing financial stability and autonomy.

1.0. Introduction

Religious organizations, especially those dependent on donations, must prioritize financial stability by cultivating lasting donor relationships (Khodakarami et al., 2015). Effective donor relations management, involving collecting, organizing, and analyzing donor information, is crucial for securing sustainable funding and fostering these relationships (Galpin et al., 2015). Prioritizing stewardship and ensuring donor satisfaction is essential, as donors who perceive their contributions as impactful are more likely to continue their support. Furthermore, nonprofit organizations should explore income diversification strategies to enhance financial stability (Moorefield, 2020; MacQuillin & Sargeant, 2020).

To enhance financial stability, religious organizations should diversify their income streams (Naibei & Mutai, 2017). This involves exploring various avenues, such as real estate investments, commercial ventures, business partnerships, and social enterprises (Muncheru, 2020). Diversification helps mitigate financial vulnerability during economic downturns, as Bielefeld and Cleveland (2019) demonstrated that religious institutions engaged in social enterprises and business ventures were more resilient. Similarly, McNamara and Fitzpatrick (2021) highlighted how income-generating activities like

rental properties and event hosting provide consistent revenue for churches. Given the importance of donor relations and income diversification for the financial sustainability of religious organizations, developing a comprehensive Resource Mobilization Action Plan is crucial.

Resource mobilization is crucial for organizations to sustain operations and achieve goals (Reyes & Santos, 2019). A comprehensive Resource Mobilization Action Plan (RMAP) integrates various strategies to secure financial and non-financial resources. Garcia (2020) highlights the influence of historical, cultural, and socio-economic factors on the fundraising strategies of religious organizations in the Philippines. Furthermore, Santos and Cruz (2020) illustrate a growing trend of environmentally conscious fundraising efforts within religious communities, including tree-planting campaigns and sustainable agriculture projects. To enhance volunteer recruitment and retention, dioceses can offer opportunities for spiritual growth and social engagement (Dela Cruz & Reyes, 2022). Traditional fundraising events like fiestas and bazaars also remain effective for diocesan projects (Reyes & Santos, 2019).

A Diocese in Negros Island faces significant resource mobilization challenges, particularly in ensuring financial stability for ministries, clergy salaries, and community outreach (Garcia, 2020). Fundraising amidst economic uncertainty and evolving donor behaviors requires innovative

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approaches and strong donor engagement (Reyes & Santos, 2019). Cultivating new partnerships and maintaining transparency in financial stewardship are crucial for building and retaining trust within the community (Santos & Cruz, 2020). The Diocese's resource mobilization initiatives should prioritize strategic planning for long-term funding and growth and effective community engagement to demonstrate impact and garner support (Dela Cruz & Reyes, 2022).

While several studies explore donor relations strategies, including Khodakarami et al. (2015) on development, Galpin et al. (2015) on sustainable cultures, and Moorefield (2020) on digital engagement, and others examine broader fundraising approaches like Naibe and Mutai (2017) on sustainability in donor relationships and Smith and King (2019) on effective communication, research specifically focused on the Philippine context remains limited. Although studies like Reyes and Santos (2019) on resource mobilization, Garcia (2020) on effective fundraising, Santos and Cruz (2020) on eco-conscious fundraising, Reyes and Santos (2019) on traditional methods, Cruz and Garcia (2021) on lay participation, and Dela Cruz and Reyes (2022) on volunteer engagement provide valuable insights into income diversification in Philippine churches, there is a notable gap in local research specifically addressing the donor relations and income diversification strategies of a diocese in central Philippines.

To address the identified research gap, this study examined donor relations and income diversification strategies within a Philippine diocese to address a research gap in these areas. Specifically, it analyzed donor relation strategies, including funding policies, relationship management, and donor influence on organizational capacity. It also assessed income diversification through various income streams and projects. Furthermore, the study investigated potential differences in these strategies based on respondent designations within the diocese. These findings were then used to develop a tailored Resource Mobilization Action Plan for the diocese.

2.0. Framework of the Study

This study posits that donor relations and income diversification strategies of the diocese are important factors in ensuring financial stability. To ensure that an organization's operations align with the Diocese's objectives of cultivating positive relationships with donors and having a variety of revenue streams, it is crucial to develop a resource mobilization action plan. This is anchored on the Resource Dependency Theory (RDT).

As proposed by Pfeffer and Salancik (2015), Resource Dependency Theory (RDT) explores

how external resources influence organizational behavior and decision-making. According to RDT, organizations rely on external resources such as financial capital, human talent, technology, and raw materials, which creates dependencies and power dynamics between them and their external environment. Organizations that control valuable and scarce resources wield significant power, shaping interactions, strategies, and structures. To manage these dependencies, organizations adopt strategies like diversifying resource sources, forming alliances, and lobbying for favorable regulations. This theory helps understand the dynamics of resource acquisition and utilization by the diocese. Applying RDT helps analyze how the diocese's actions are influenced by its need for external resources, particularly donations, and how it can strategically manage these dependencies.

The above assumption claims the importance of determining the extent of donor relation strategies of a diocese in terms of donor funding policies, donor relationship management, donor's influence in organizational capacity, and the extent of income diversification in terms of income streams and income-generating projects. RDT is appropriate for this study since it examines how the diocese manages donor relationships and tries to diversify its sources of income. This helps gain a thorough understanding of the diocese's organizational strategies and sustainability initiatives as assessed by clergy and parish pastoral council members regarding the extent of their strategies on donor relations and income diversifications. Examining the diocese donor relations and income diversification strategies form the basis of implementing the Resource Mobilization Action Plan.

3.0. Methodology

Research design. This study adopted a descriptive-comparative research design to answer the questions presented in the statement of the problem. This research design is suited for this study since it focuses on obtaining knowledge about the diocese's present donor relations and income diversification procedures and tactics (Brown & White, 2019).

Furthermore, descriptive research is utilized in this study to describe the extent of donor relation strategies of the diocese in terms of donor funding policies, donor relationship management, and donor's influence in organizational capacity. Likewise, it assessed the extent of income diversification in terms of income streams and income-generating projects.

The comparative design examined differences or similarities between diocesan clergy and parish pastoral council members assigned to the finance committee.

Respondents. The respondents of this study were 128 clergy and members of the finance committee of parishes of a diocese in central Philippines. The stratified random sampling was employed to get the total number of respondents needed for the survey. Table 1 shows the distribution of the respondents.

Table 1
Distribution of Respondents

Diocese in Negros Island	N	n	%
Clergy	97	65	50.8
Members of the PPC	92	63	49.2
Total	189	128	100

Research instrument. A researcher-made questionnaire designed to gather data on demographics, donor relations strategies, and income diversification strategies underwent rigorous validity and reliability testing. Content validity was established by ten experts (five business administration professionals and five finance committee members from other dioceses) who rated each item as “essential,” “useful but not essential,” or “not essential,” using the content validity ratio. The resulting content validity index of 0.96 confirmed the questionnaire’s essential relevance. Reliability was then assessed with 30 respondents (15 diocesan clergy and 15 finance committee members from a diocese) not involved in the final data collection, yielding a reliability index of 0.710, indicating strong internal consistency. This validated questionnaire, with its established rating scale, was then used to collect data for the study.

Scale of Interpretation for the Extent of Donor Relations Strategies

Scale	Range	Verbal Description	Verbal Interpretation
4	3.26-4.00	Very Great Extent	The diocese always utilizes donor relations strategies.
3	2.51-3.25	Great Extent	The diocese often utilizes donor relations strategies.
2	1.76-2.50	Poor Extent	The diocese sometimes utilizes donor relations strategies.
1	1.00-1.75	Very Poor Extent	The diocese never utilizes donor relations strategies.

Scale of Interpretation for the Extent of Income Diversification Strategies

Scale	Range	Verbal Description	Verbal Interpretation
4	3.26-4.00	Very Great Extent	The Diocese always utilizes income diversification strategies.
3	2.51-3.25	Great Extent	The Diocese often utilizes income diversification strategies.
2	1.76-2.50	Poor Extent	The Diocese sometimes utilizes income diversification strategies.
1	1.00-1.75	Very Poor Extent	The Diocese never utilizes income diversification strategies.

Data collection procedure. After obtaining ethical approval and permission from the relevant authorities, the researcher ensured that participants understood the study’s purpose, methodology,

and rights through informed consent forms and orientation sessions. These measures emphasized voluntary participation, anonymity, confidentiality, and the freedom to withdraw. Data collection yielded a 100% response rate with these ethical safeguards in place. All study materials were securely stored until publication and destroyed, maintaining confidentiality and responsible data management.

Data analysis procedure. Data analysis involved both descriptive and inferential methods. Descriptive statistics, including mean and standard deviation, were used to illustrate the extent of donor relations and income diversification strategies within a Negros Island diocese. Frequency count and percentage distribution further detailed these strategies across different respondent designations. A Kolmogorov-Smirnov test revealed non-normal data distribution, necessitating non-parametric tests. Therefore, the Mann-Whitney U test was employed to identify significant differences in donor relations and income diversification strategies between respondent groups.

4.0. Results and Discussion

Profile of the respondents

This study included 128 participants, with 63 Parish Pastoral Council (PPC) members (49.2%) and 65 diocesan clergy (50.8%), as shown in Table 2. This near-equal representation of both groups ensures an inclusive study design, capturing diverse perspectives on parish activities from lay leaders and religious

figures. By prioritizing input from these key stakeholders, the research aims to provide a comprehensive view of parish functioning, encompassing governance and spiritual leadership. This balanced approach also minimizes potential hierarchy or bias in data collection, aligning with participative leadership practices within the diocese.

Including PPC members and diocesan clergy allows for meaningful comparisons between lay and clerical perspectives on various parish operations and religious initiatives. This comparative analysis can identify potential gaps, strengths, or alignment in their views, contributing to a deeper understanding of parish dynamics. The equal representation underscores the importance of collaboration between clergy and laity in fostering organizational effectiveness and community engagement, as emphasized in research on parish governance (Eckholt, 2019; Hanvey & Carroll, 2021).

The near-equal distribution between clergy and

PPC members reflects a commitment to participative governance, consistent with recent church practices and Pope Francis' (2021) Synod of Bishops. This synodal approach emphasizes the importance of listening to all clergy and laity members to foster unity and effective decision-making within the Church. By incorporating diverse voices, the study aligns with the modern Catholic Church's call for inclusivity and shared responsibility in parish life.

Table 2
Demographic Profile of the Respondents

Variable	f	%
Designation		
PPC Members	63	49.2
Diocesan Clergy	65	50.8
Total	128	100.0

Extent of donor relation strategies of the diocese

In Table 3, respondents generally assessed the diocese's donor relation strategies to a very great extent (M=3.55, SD=0.33) and across four variables: funding policies, donor relationship management, donor's influence in organizational capacity, and overall donor relation strategies. While PPC members and diocesan clergy provided high ratings, PPC members consistently scored slightly higher across all variables, indicating greater satisfaction with the strategies. This minor difference may reflect the PPC's more active involvement in fundraising and donor engagement activities. Despite this, the low standard deviations across both groups suggest a consensus and consistency in their perceptions of the diocese's efforts in maintaining donor relations.

The consistently high ratings across all variables indicate that the diocese has implemented effective strategies for managing donor relations. The "very great extent" assessment for funding policies suggests clear and effective guidelines for obtaining, managing, and utilizing funds. Similarly, high scores in donor relationship management reflect strong engagement and rapport between the diocese and its donors, likely fostering trust and sustainable partnerships. Scores related to donor influence in organizational capacity suggest that donors play a significant role in shaping the diocese's capacity and operations, but this influence is perceived positively.

Table 3
Extent of Donor Relation Strategies of a Diocese in Negros Island

Variable	Funding Policies			Donor Relationship Management			Donor's Influence in Organizational Capacity			I
	M	SD	Int	M	SD	Int	M	SD	Int	
PPC Members	3.75	0.21	VG	3.75	0.23	VG	3.74	0.24	VG	3.
Diocesan Clergy	3.39	0.39	VG	3.37	0.40	VG	3.32	0.40	VG	3.
Whole	3.57	0.36	VG	3.55	0.38	VG	3.53	0.39	VG	3.

These findings align with studies emphasizing the importance of relationship management in donor retention and fundraising success (Sargeant & Shang, 2020). The diocese's high ratings reflect the application of relational marketing principles, prioritizing sustainable relationships with donors to develop stable funding streams (Bennett & Barkensjo, 2021). Furthermore, the findings support that donors can positively influence organizational growth when their input aligns with the organization's mission (Hudson, 2009). However, this influence must be balanced to avoid dependency or mission drift (Ebrahim, 2016).

Extent of income diversification strategies of the diocese

As shown in Table 4, respondents generally assessed the diocese's income diversification strategies to a very great extent (M=3.55, SD=0.37) and across three variables: income streams, income-generating projects, and overall income diversification. PPC members consistently provided higher scores across all variables, indicating robust involvement in generating diverse income streams and projects. While diocesan clergy also engaged in these efforts, their slightly lower mean scores and higher variability suggest varying levels of involvement, possibly due to their primary focus on pastoral duties.

The findings show that both PPC members and diocesan clergy actively participate in the diocese's income diversification efforts, with PPC members demonstrating stronger and more consistent engagement. This collaborative approach aligns with Goyder's (2019) assertion that involving clergy and lay members fosters collaborative revenue generation. The overall high scores suggest effective income diversification, potentially reducing reliance on traditional sources like donations and promoting financial resilience, which is especially crucial during uncertain times (Faggio & Overman, 2020).

The diocese's proactive approach to income generation reflects Salamon's (2020) view that nonprofits must adopt entrepreneurial strategies to stay relevant. Diversifying income sources, such as investments, businesses, and donations, is crucial for sustainable church operations (Chaves & Anderson, 2021). The slight variation between PPC members

Table 4
Extent of Income Diversification of a Diocese in Negros Island

Designation	Income Streams			Income-generating Projects			Income Diversification		
	M	SD	Int	M	SD	Int	M	SD	Int
PPC Members	3.79	0.20	VG	3.72	0.25	VG	3.75	0.19	VG
Diocesan Clergy	3.34	0.46	VG	3.37	0.40	VG	3.35	0.40	VG
Whole	3.56	0.42	VG	3.54	0.38	VG	3.55	0.37	VG

and clergy is consistent with Ammerman’s (2019) observation that lay volunteers often have greater flexibility in financial ventures. Ultimately, the findings suggest that shared leadership in income diversification enhances financial outcomes for the diocese (Perri et al., 2022).

Difference in the extent of donor relations strategies of the diocese

As shown in Table 5, analysis of donor relation strategies revealed statistically significant differences across key variables: funding policies (U= 945.500, z= -5.337, p= 0.000); donor relationship management (U= 926.500, z= -5.436, p= 0.000); donor’s influence in organizational capacity (U= 772.000, z = -6.166, p= 0.000); and overall donor relation strategies (U = 636.500, z = -6.746, p = 0.000). These findings indicate a lack of standardization in how the diocese interacts with and manages its donors, potentially leading to inconsistencies in funding stability and relationship outcomes.

Variability in funding policies suggests inconsistent application across donors, likely stemming from differing donor expectations or a lack of clear internal guidelines. Differences in donor relationship management imply that engagement and communication may vary based on factors like donation size or frequency, potentially creating disparities in how different donors are cultivated. The variability in donor influence on organizational capacity points to differing degrees of donor impact, raising concerns about potential overreliance on certain donors and the possible influence this could have on internal processes.

Table 5
Difference in the Extent of Donor Relation Strategies of the Diocese

Variable	U	z	p
Funding Policies	945.500*	-5.337	0.000
Donor Relationship Management	926.500*	-5.436	0.000
Donor’s Influence on Organizational Capacity	772.000*	-6.166	0.000
Donor Relation Strategies	636.500*	-6.746	0.000

Note: *the difference in the means is significant when p<0.05

These findings align with existing research highlighting the challenges organizations face in balancing donor expectations and organizational capacity (Arshad et al., 2020). Inconsistency in donor

management strategies can negatively impact long-term sustainability and create power dynamics that unduly influence internal processes (Ebrahim, 2019). To mitigate these risks, the diocese should prioritize standardizing its donor relations strategies to ensure consistency and transparency and minimize potential undue influence from individual donors.

Difference in the extent of income diversification strategies of the diocese

Table 6 presents the difference in the extent of income diversification strategies of the diocese in terms of diversification of income streams and income-generating projects. There was a significant difference in the extent of income diversification [U=819.500, p=0.000], and in terms of income streams [U=840.500, p=0.000], income-generating projects [U=1028.000, p=0.000] when respondents are grouped according to the designation. PPC members rated significantly higher than diocesan clergy in all areas. This suggests that the extent of income diversification varies significantly within the diocese.

The results reveal significant disparities in income diversification within the diocese. The negative z-score for income streams suggests a heavy reliance on a limited number of sources, posing a risk to financial stability due to increased vulnerability to economic fluctuations. Furthermore, the differences in income-generating projects indicate varying effectiveness in revenue generation, highlighting the need for the Diocese to evaluate and optimize these projects. The low U statistic and significant p-value also reflect limited income diversification,

which could weaken the diocese’s overall financial resilience.

Some research underscores the importance of income diversification for organizational

Table 6
Difference in the Extent of Income Diversification of a Diocese in Negros Island

Variable	U	z	p
Income Streams	840.500*	-5.868	0.000
Income-generating Projects	1028.000*	-4.941	0.000
Income Diversification	819.500*	-5.887	0.000

Note: the difference in the means is significant when ≤ 0.05

sustainability and resilience. Barbosa et al. (2020) emphasize that diverse income streams reduce reliance on single sources and provide a buffer against economic downturns, advocating for nonprofit organizations to pursue varied funding sources to enhance financial stability. Similarly, Perry and Jeyaraj (2019) highlight the necessity of evaluating income-generating projects for their effectiveness, advocating for ongoing assessment and adaptation to meet changing market conditions and stakeholder needs. Collectively, these findings suggest that the Diocese should implement strategic income diversification efforts to improve financial sustainability and adaptability in the face of economic challenges.

Overall, this study's findings align with Pfeffer and Salancik's (2015) Resource Dependency Theory (RDT), which posits that organizations rely on external resources and must proactively manage relationships with stakeholders controlling those resources to ensure operational efficiency and autonomy. The diocese's efforts to cultivate strong relationships with donors, as reflected in the high ratings for donor funding and relationship management initiatives, demonstrate an understanding of this dependency. By engaging with donors to a "very great extent," the diocese aims to secure funding and reduce uncertainty in resource acquisition.

The higher ratings from PPC members, who are more directly involved in financial management, suggest a deeper understanding of the strategic importance of donor relationships. This disparity in perception between PPC members and clergy underscores how differing organizational roles influence individuals' views of external dependencies, a key aspect of RDT. Due to their closer proximity to financial management and donor interactions, PPC members may be more acutely aware of the pressures and expectations associated with these relationships, further emphasizing their role as intermediaries between donors and the diocese.

However, the notable differences between PPC members and clergy regarding diversifying income sources indicate a potential disconnect in understanding the need to reduce dependency on donor funding. This pursuit of diversified income streams aligns with RDT's assertion that organizations can regain autonomy by reducing reliance on

any single external resource. Ultimately, the diocese's efforts to balance securing essential resources with maintaining operational independence exemplify the core tenets of

RDT, highlighting the constant negotiation between external dependencies and organizational autonomy.

5.0. Conclusion

This study highlights the importance of balancing resource acquisition with autonomy in diocesan financial management. While actively engaging with donors is crucial for securing the necessary funding, diversifying income streams and fostering a shared understanding of these strategies among clergy and lay leaders are equally important for mitigating over-reliance on any single source and maintaining operational independence. The greater awareness of external dependencies among PPC members, likely due to their closer involvement in financial management, underscores the need for clear communication and collaboration between all stakeholders to ensure long-term financial stability and autonomy within the diocese.

6.0. Limitations of the Findings

While offering valuable insights into diocesan financial management, this study has limitations. The small sample size and specific location restrict generalizability. The questionnaire's narrow focus on designation, donor relations, and income diversification may not fully capture the complexities of diocesan financial practices. Additionally, reliance on self-reported data introduces potential biases and limits nuanced understanding. Finally, the research design may constrain the explanatory power of the findings.

7.0. Practical Value of the Paper

This study highlights the importance of understanding donor motivations and diversifying income streams for religious and nonprofit organizations. Diocesan leaders should actively engage with donors to understand their giving priorities, while exploring new revenue sources like endowments, social enterprises, and fee-based services. It is crucial to raise awareness about the risks of resource dependency and promote collaborative financial decision-making between clergy and lay members. By adapting the study's best practices in donor management and financial governance, diocesan leaders can create a more sustainable financial foundation for their organizations.

8.0. Directions for Future Research

Future research should explore the longitudinal evolution of donor relations and income diversification strategies, conduct comparative analyses across dioceses or nonprofits to identify best practices and investigate the impact of technology on donor engagement. Expanding stakeholder perspectives, assessing training program effectiveness for clergy and lay leaders, examining Resource Dependency Theory in diverse contexts, and employing qualitative methods to gain deeper insights into the challenges and motivations related to these strategies would further enrich this field of study.

9.0. Declaration of Conflict of Interest

The authors reported no conflict of interest in the conduct of this research.

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