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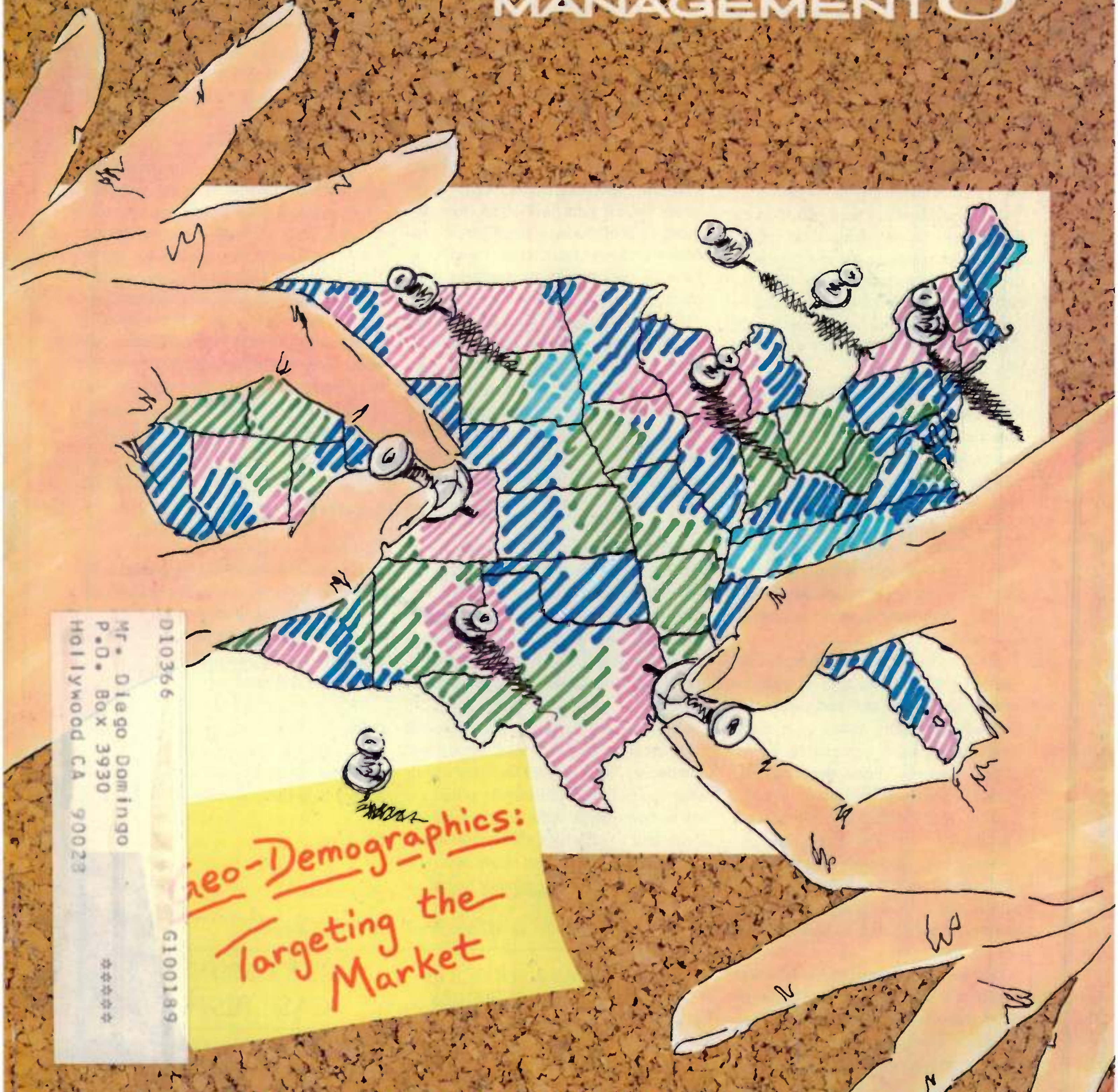
Fund Raising MANAGEMENT



1990 — YEAR OF NEW MATH

NON-PROFIT ECHO AWARD WINNERS

PAID ADVERTISMENT

GIVE AND GAIN

RECOGNIZING THE EFFORTS OF DEVELOPMENT PROFESSIONALS

VOLUME 1, NUMBER 6 DECEMBER, 1989

YEAR-END GIVING -- AN ONGOING EFFORT?

By: Steve I. Schneider, Esq.
Major Gifts/Planned Giving Consultant
Children's National Medical Center
Washington, DC 20010

The holidays are here and soon our donors will be preparing their income tax returns claiming all the legitimate deductions they can to reduce their current tax liability. With this in mind, have you been marketing your major gifts/ planned giving program for those end-of-year gifts?

I have heard many people say that they want to contribute to my organization, but that they cannot afford to give up an asset nor its income without something in return. I feel that it is incumbent upon me as a professional to educate my constituency as to the major giving opportunities we offer. I know that not everyone who wants to support us can afford to invest in our organization without receiving income or an income tax deduction.

Our giving opportunities include outright gifts of cash, appreciated marketable securities, and real estate with planned gifts using assets such as deferred or immediate charitable gift annuities, lead and remainder trusts, life insurance, gifts of home or vacation property with retained use, or naming us a beneficiary in a Will or qualified pension program. These opportunities must be marketed on a continuous basis during the year. Waiting until October or November for an end-of-year appeal is just too late.

Marketing is crucial to the establishment of any successful major gifts/planned giving program. For a successful marketing program, I recommend that you conduct educational seminars once or twice a year; mail a newsletter to your donors at least three or four times a year discussing the various giving opportunities that your organization offers; cultivate individuals who request information about a particular giving opportunity while placing their names on your mailing list, and motivate the professional community of attorneys, accountants, financial planners, life insurance agents, stock brokers, and trust officers as to the opportunities you offer. Some of my largest gifts have come from this group of professionals since they are the ones who know their client's needs and have an opportunity to reinforce what charitable giving will do for them.

It is not enough to wait until the end of the year to solicit a charitable gift. Most people have made their year-end gifts by November. Sure, this may be the best year ever for year-end giving using appreciated stock or property, but every year is a good year to invest in the future of your organization. Through proper marketing, you will receive a steady flow of gifts during the year and observe that some of those same individuals are making year-end gifts too.

Steve I. Schneider, Esq. began his law career with the Internal Revenue Service. As a tax attorney and consultant, he has specialized in planned giving for non-profit organizations for more than 6 years. He has established planned giving programs for Georgetown University, Special Olympics International, Children's National Medical Center and other local organizations. Mr. Schneider speaks regularly to business and community groups and teaches a course in planned giving at George Washington University.

THANK YOU AND HAPPY HOLIDAYS

All of us here at The Brennan Companies, together with our charitable representatives across our nation, extend every good wish for a Holy and Happy Holiday Season. The true meaning of this wonderful time of the year is very satisfying for all of us in our organization.

We have strived to maintain a record of dedication to donee institutions and the donors, spouses and families whom they counsel. Our philosophy is that we are put on this earth to count ourselves least, and to effectively serve the interests of others. We stand ready to do so! This priviledge is inseparably bound to responsiblity, as was so well expressed to me by a dear friend in Wilmington, Delaware.

We at The Brennan Companies will continue to improve and expand our services in the decade to follow. We will continue to provide the finest services we possibly can for charitable institutions both large and small.

Again, congratulations to all of you, thank you for letting us participate with you, and our prayer is that you shall continue to enjoy success in helping people help themselves.

Sincerely,

Joe

Joseph J. Brennan

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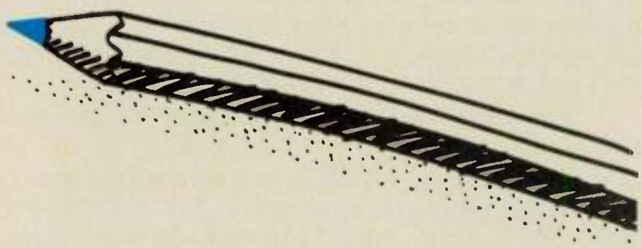
Give us a call and find out what our Quick-Call and Phone-Mail programs can do for your next fundraising campaign.



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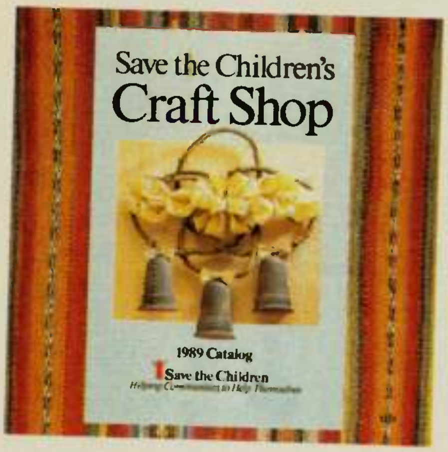
Fund Raising Management (USPS 212-000) (ISSN: 0016-268X) is published monthly by Hoke Communications, Inc., at 224 Seventh Street, Garden City, L.I., New York 11530-5771. Subscription price is $45 a year. Second class postage paid at Garden City, L.I., NY and at additional mailing offices. Copyright 1989 by Hoke Communications, Inc. Please give 60 days' notice for change of address. Postmasters: Send form 3579 to Fund Raising Management Magazine, 224 Seventh St., Garden City, NY 11530-5771 — 516/746-6700. Out of state 800/229-6700. Facsimile number 516/294-8141.

Fund Raising MANAGEMENT

December 1989 • Volume 20 • Number 10



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Cover illustration and design by Joanne C. Johnson.

NON-PROFIT TELEPHONE FUND RAISING *Specialists*

INFOCISION MANAGEMENT

Telemarketing results exceed projections

I would like to express my appreciation to you and your staff for the excellent results in our Countertop Upgrade Campaign.

To ask people for volunteer hours is a difficult task. Your caring professionals provided excellent results and exceeded our projections.

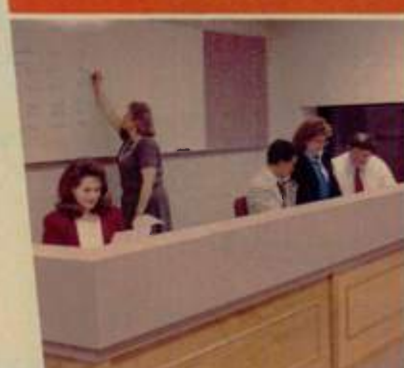
I appreciate InfoCision's willingness to do whatever it takes to make our campaign successful.

I look forward to working with you in our next campaign.

WORLD VISION

Kris Lindsay, Coordinator
Volunteer Programs

Three, 40 line outbound centers



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Letters to the Editor

Educating The Board

Dear Editor:

Willard Bailey is so right ("The turnover/competency issue revisited") on page 82 of your October 1989 issue.

I have observed so many non-profit agencies throughout the country, and in particular here in Denver, where I have lived for the past 10 years. They do the same thing over and over again and again. They hire an individual with really no experience in development and fund raising!

The hospitals in Denver have done this time and again. And, I sometimes wonder why? Is it because the hospital has a board that is not knowledgeable about development and fund raising? In most cases, the answer is yes. They don't know what development and fund raising entails. The board member of one Denver hospital is a delightful elderly lady, with lots of bucks. During interviews for a new development director she liked a young lady, thought she was charming and brought her on as their development officer.

How long will the young lady last? Probably a year, maybe 18 months, and then she will be gone using her latest hospital experience as a key element on her résumé.

Boards, whether hospitals or other non-profits, are the biggest problem. Campaigns, development programs and fund raising rest on their knowledge, their ability, their dedication to the institution that they serve. And as well, the acceptance to follow the development officer's advice — *if* that development officer is qualified! And so many aren't!

Sincerely,
Raymond W. Conlin
Consultant
2977 E. Blazing Lane
Highlands Ranch, CO 80126

Broadening Consensus

Dear Editor:

Willard Bailey's follow-up to his series on competency among health-care development officers ("The turnover/competency issue revisited" — October 1989) described what appears to be a step forward by NAHD's Chairman Charles Heim and his outside advisory group.

However, the final paragraph of self-congratulatory praise for NAHD's initiative — at the stated expense of NSFRE and CASE — points to another issue that undermines efforts to "professionalize" development practice, i.e., the absence of a single representative body of fund raisers at the national level. A recent report from the University of Maryland cited this as a key obstacle to the consideration of development as a bona fide profession.

The conclusion is that Heim's advisory group, which is purportedly trying to raise the level of development practice, should find ways to involve NSFRE and CASE in their deliberations rather than worrying about who gets credit for a good idea.

Sincerely,
Jay R. Wein
President
Wein Associates
153 St. Paul St.
Brookline, MA 02146

Handling Technology

Dear Editor:

I was thrilled to have read the recent article "Clearing The Software Hurdles" in your October issue. As I am currently living an implementation nightmare, such an article from an outside source is a terrific boon. I will be certain to have all our management read it!

Though the comments made by Ms. Hendrix are "common sense," they still are a tough sale to the people who make such sizable investments in computer technology. I would be very interested in hearing about any further articles that Hendrix or your staff may know of so that I may refer staff and management.

(continued on page 56)

Editor's Notebook

At the Center of a Paradox

These are special days. Not only do we stand on the brink of a new year, but a new decade — the final decade of the 20th century. Fund raising has come a long way in the past 10 years. In 1979, Americans donated $43.36 billion to charity; in 1988 that number skyrocketed to $104.37 billion. The number of fund raisers has increased as has the quality of their performance as professionals.

Del Staecker, NSFRE chair-elect and president of the Saint Thomas Foundation, Nashville, Tennessee, recalled the growth of fund raising at the recent New Jersey Conference on Philanthropy in East Brunswick, New Jersey. "We had 254 persons attend the 1979 national conference in Washington, D.C., including vendors. This year in Anaheim, some 2,300 persons attended," said Staecker. NSFRE currently boasts about 11,000 members in 110 chapters throughout the United States.

Staecker said that fund raisers will find themselves at the center of a paradox as they enter the 1990s. "We will be asked to do more and at the same time we will be scrutinized as to why we are receiving special privileges in taxation and mailing," said Staecker.

The NSFRE chair-elect spoke briefly about the society's strategic plan. First, he said, "we want to become the comprehensive organization for *all* fund raisers, whether they work in hospitals, colleges or for the Red Cross." Second, education has to be the key to success for NSFRE and individual fund raisers. Third, the strategic plan accents the credentialing process. With the emphasis on accountability today, "You better be good at what you do," he warned. With accountability in mind, NSFRE is currently working on "an enforceable ethics code." And finally, NSFRE will assist in the formation of a world fund-raising council.

Given the circumstances of ever increasing need and the decreasing role of government, this field should continue to explode. Donations to charity could very well double again, to $200 billion, by 1999.

Stick With the Winners

Each year we honor the Echo Award winners in the non-profit category. Last month in our religious issue we featured two gold winners — Christian Children's Fund and World Vision. This month we showcase the remaining eight winners — two gold, three silver and three bronze.

The competition, now in its 60th year, is designed to recognize companies, agencies and individuals who have conceived, produced or used programs that have been exceptionally successful in achieving sales, marketing, non-profit or promotional goals. This year's contest attracted 1,303 entries — 1,076 from the United States and 227 from other nations. The Direct Marketing Association selected 92 award winners — 28 gold, 28 silver and 35 bronze. The non-profit category accounted for 10 of the awards. Our coverage, prepared by Associate Editors Mollie Neal and Gary Wojtas, starts on page 19.

Don't Say You Weren't Told

I'd like to point out two features that will help you in planning for the decade of the 1990s. One is by Jerry Huntsinger, "1990: The Year of the New Mathematics." It starts on page 26. He takes a hard look at where direct mail is going and offers some interesting observations about the future and what mailers can do to cope.

The second feature will appear in our January issue. It is written by our Washington, D.C. correspondent, lawyer Bruce R. Hopkins. He gives us an insider's view of what the future looks like from the vantage point of a lawyer in Washington, D.C. Not only does he offer some startling thoughts on what's coming in legislation and regulation, he also recommends some steps non-profits can take to shape their own future.

Hopkins says the most important question is not, "What is coming?" but "What should fund raisers be doing about it?" The fund-raising profession does not have much of a record in the field of government relations, he writes. "If nothing is done in this area, more adverse law and regulation for fund raisers and the charities they serve will be the order of the day. But there is much that can be done to forestall or shape these coming changes." He then goes on to explain what can be done. This report is must reading for fund raisers looking ahead to the 1990s.

William Olcott

William Olcott, editor

USPS Seeks Cap On Rate Rises

We can keep the postal service affordable, and our intermediate goal is to keep rate rises 2 percent below the Consumer Price Index," said Postmaster General Tony Frank at the Fifth Brookings Forum on the USPS held recently in Washington D.C.

Cary H. Baer, vice president, distribution for *Reader's Digest*, recommended the use of cash incentives. "As a ratepayer I'm willing to put incentive money on the table. I propose that a portion of my rate be set aside for all permanent full-time postal employees as a Cash Performance Sharing Award when the USPS meets certain financial performance targets." With a show of hands, Baer's idea was well received.

Donald H. Lander, president and CEO, Canada Post Corporation (CPC), cited a new state-of-the-art electronic measuring system used to track the mail's progress at any stage and learn where bottlenecks are occurring in time to correct the situation or, at least, ameliorate it. While CPC handles less mail volume each year than the United States, it can be looked upon for ideas since it has made dramatic strides in turning a near-disastrous situation around in just a few years. CPC now shows a profit and is making considerable progress with innovative and bold management techniques, said Lander.

John Crutcher, seven-year member of the Postal Rate Commission, thinks USPS is over-supervised and feels that even a 10 percent reduction could save $130 million per year. But the greatest potential, he said, lies in contracting out more often. For example, the Grace Commission reported that some $100 million could be saved each year by contracting out substations. Crutcher urges USPS to strengthen its controls over unauthorized absences and cautioned against giving top management any year-end bonuses in 1989 — when it's due to their mismanagement that the USPS has failed to produce an expected surplus of $1.6 billion, he said. — MN

It's "Time To End Hunger"

Prime Time To End Hunger is a cooperative humanitarian effort involving the media, volunteer organizations, corporations and telecommunications companies. The campaign will focus the nation's attention on hunger, homelessness, poverty and other social issues that can be changed by voluntarism.

ABC, CBS and NBC have agreed to air episodes specifically written about these issues during the first three weeks of December. Prime time TV shows that have committed to this project include "The Cosby Show," "thirtysomething," "Golden Girls," "Murder, She Wrote," "Head of the Class," "Cheers" and "Designing Women."

During the shows, viewers were invited to call a special regionalized 900 number to receive information that can help them become involved as a volunteer and link them with a local non-profit organization. There was no solicitation for funds. These TV programs have a combined potential of reaching 290 million viewers and will hopefully encourage at least 175,000 Americans to volunteer one hour per week.

The United Way of America and VOLUNTEER-The National Center coordinated the volunteer response system and assisted in preparing the Volunteer Handbook, which is designed as a "consumer's guide" to community service to help viewers select appropriate activities. Also during the campaign, President Bush participated in televised public service announcements to urge Americans to engage in community service.

The campaign was developed by the End Hunger Network, a national non-profit organization (213/273-3179) that focuses the power of the media on ending hunger. Other organizations assisting the program include The Emergency Food and Shelter National Board, Polaroid Education Program, long-distance carriers, telemarketing response companies, information transcribing services, 4,000 volunteer referral agencies and numerous corporate sponsors. — MN

Popular TV shows, "Cheers," and "Golden Girls," helped focus viewer attention on hunger and homelessness.

Capitol News Cheers Non-Profits

Non-profits got a heavy dose of good news recently in Washington, D.C. According to Independent Sector's *Government Relations Info and Action* newsletter, the good news came on several fronts:

*The House Ways and Means Committee will not take up the unrelated business income tax (UBIT) proposal until next spring. The proposal would increase the tax on a number of income-producing activities of non-profits. The House Ways and Means Oversight Subcommittee, which developed the proposal, reportedly will wait to act on the plan until they get results of a U.S. Treasury survey of 3,000 non-profits. The survey will provide information on how well those non-profits have complied with present UBIT law.

*The Senate Finance Committee has voted to enact legislation that will remove, for one year, gifts of appreciated property from the alternative minimum tax. The issue then went to a conference between the Finance Committee and the House Ways and Means Committee.

In the Tax Reform Act of 1986 gifts of appreciated property were included for taxation in the alternative minimum tax. Since 1986, some arts groups as well as institutions of higher education have reported as much as a 30 percent drop in gifts of appreciated property which they attribute to restrictions related to deductibility of such gifts.

*Congress has passed the Byrd Amendment requiring greater lobbying disclosure and prohibiting lobbying with federal funds. Specifically, the House legislation

would prohibit use of appropriated funds to influence the awarding of federal grants, contracts, loans and cooperative agreements. The legislation would also require that an applicant for a federal grant, contract, loan, cooperative agreement or a federal guarantee or insurance of a loan disclose any payments made with other, non-appropriated funds that would have been prohibited if made with appropriated funds.

The legislation, which probably will be enacted into law, affects lobbying for grants of more than $100,000 and it applies only to lobbying on behalf of a specific grant. It would not, for example, apply to lobbying by a non-profit in support of a federal appropriation measure.

Disclosure will be required when an organization hires "outside" lobbying representation but would not be required for lobbying by full-time staff of the organization. — WO

George Reed (back to camera) and Mark Keele, volunteers at Central Arizona Shelter Services, Inc., in Phoenix help transport furniture donated to the shelter by the Best Western Papago Inn and Resort in Scottsdale.

Hotel, Designers Aid Homeless

Shelter Resource Partners (SRP), a national community service program founded by Best Western International and the American Society of Interior Designers (ASID), have teamed up to provide assistance for transitional homeless shelters throughout the United States and Canada.

Under the program, ASID design teams and Best Western Hotels contribute interior design services, furniture, fixtures and equipment to 501(c)(3) shelters designated by the National Alliance to End Homelessness.

During its first year of operation SRP will target 12 pilot projects (Alabama, California, North Carolina, South Carolina, Georgia, Hawaii, Maryland, Nebraska, Pennsylvania, Texas and Washington, D.C.). The selected shelters and/or housing to benefit will be those that are available for the economically disadvantaged, chronically disabled or those suffering severe personal crises, such as battered women and runaways. Initial projects were recently completed in Denver and Los Angeles, with a third project currently under way in Phoenix.

Ron Evans, CEO of Best Western International, said, "Through the SRP project, our members contribute time, talents and resources to help alleviate the need for clean, uncrowded, well-equipped transitional shelters."

— MN

Sobering Thoughts For Mailers

Nine percent of all bulk business mail ends up as undeliverable as addressed (UAA) "junk," says Ron Friedman, president, Group 1 Software.

Friedman told the Direct Marketing Association of Washington, D.C., that the USPS estimates that on a per-company basis, the percentage of UAA mail can reach 25 percent to 30 percent. "In 1988 direct marketers spent about $22 billion in direct mail costs. Nine percent of that is approximately $2 billion. Coincidentally, the USPS spends another $2 billion dealing with UAA mail. That's $4 billion plus who-knows-how-many billions in lost business opportunity. Pretty expensive 'junk.' "

To counteract this, Friedman urged direct mailers to pay attention to address hygiene, list maintenance and targeted mailings. "One-third of undeliverables can be eliminated by using ZIP+4 coding on addresses," he said. To make the mail 60 percent more deliverable, said Friedman, try using the NCOA system. "To get more than 90 percent of the pieces where they are supposed to go, use NCOA plus address hygiene (address standardization, ZIP code correction, carrier route coding, merge/purge).

To counter misdirected mail, Friedman called on mailers to use such tools as demographics, psychographics and recency/frequency analyses. "And after you mail to a prospect several times with no response, save your money and take that person off your list!" he said.

Friedman warned that there will be a rate case in 1990 which means a postal increase in early 1991. "No question about it — get ready, because it will be staggering," he said.

Friedman listed what he sees coming in third-class mail: distanced based rates/drop ship discounts; discounts for carrier walk sequencing through either nine-digit sort, street number sort or odd/even street number sort (probably for saturation mail — 75 percent or more of a route); emphasis on discounts for machineable/automatable mail (size/shape and makeup); increased discounts for mailer automation. "There will be incentives to use all the above and disincentives to do anything contrary," said Friedman. (39-0803 WM $12) — WO

Exxon Quits Wildlife Group

Exxon has resigned from a national wildlife board because of criticism the group leveled against the oil giant over the cleanup of the Alaska oil spill in Prince William Sound. Exxon has been a charter member of the National Wildlife Federation (NWF) Corporate Conservation Council (CCC) since 1982. The spill killed some 100,000 animals.

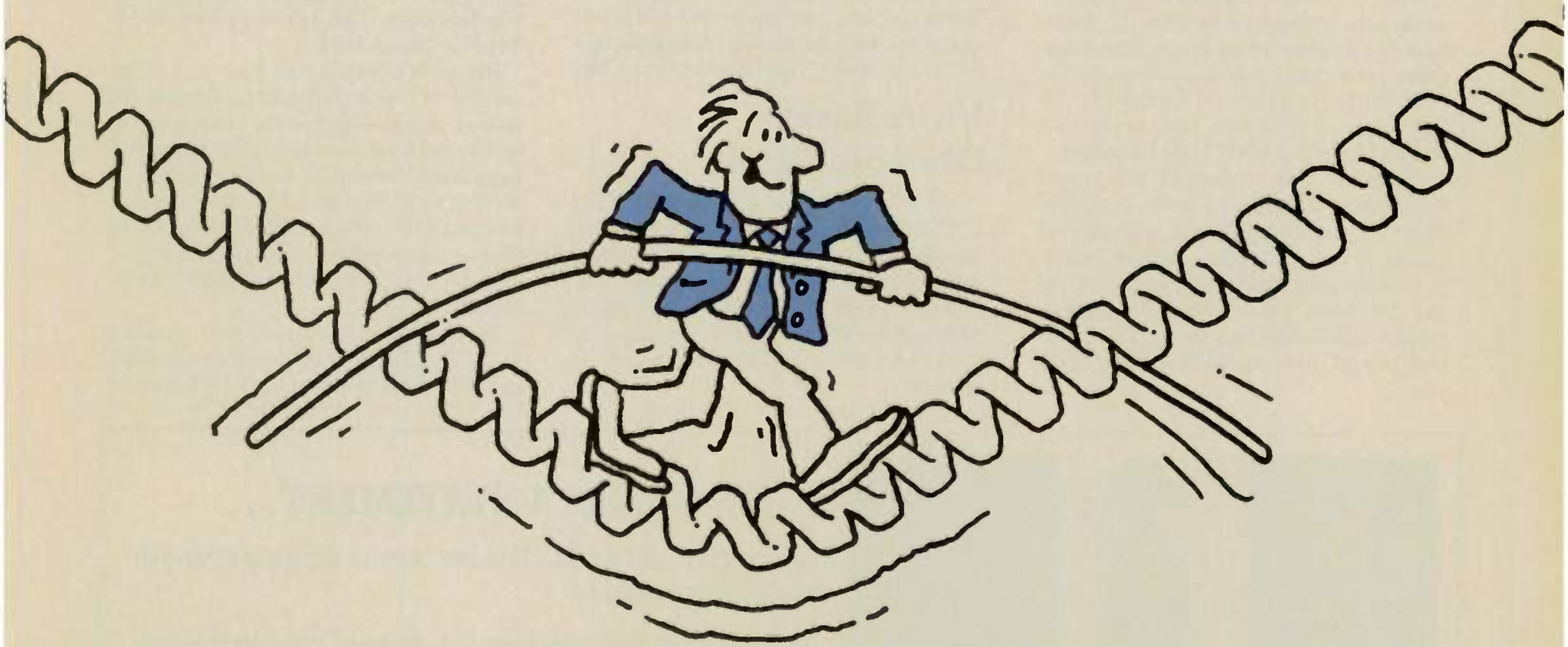
In a recent letter to NWF chief Jay Hair, Exxon officials said they were leaving the group because the NWF had not been objective in its stance on the oil cleanup. Hair responded strongly, calling Exxon "a pariah."

"Recent public actions by you [NWF] regarding the Valdez oil spill have failed to demonstrate any sense of objectivity or fairness," wrote Raymond Campion, Exxon's environmental coordinator.

Exxon has spent a reported $1 billion in its oil cleanup efforts, but has not satisfied the NWF or many Alaskan officials who say that the area is years away from returning to its natural state. The federation reported that despite the money spent on the cleanup from the March 24 spill, none of the beach has returned to its natural state.

In a response to Exxon's resignation, Hair wrote back, "I regret we do not meet your 'expectations,' but did you really think your membership on our CCC would buy

YOUR FUTURE IS ON THE LINE.



Stock market fluctuations . . . changing demographics . . . budget deficits . . . fears of inflation . . . recession.

Your organization's very survival can depend on the tightrope-walking skills of its development staff.

In development, it seems, the future is on the line every day.

We have good news. Your future is on the line.

A well-designed and skillfully-managed Telephone Outreach Program can identify qualified prospects for major and planned gifts; convert 25%-35% of your "non-donor" constituents into solid supporters; and significantly increase the average gifts of your current contributors.

Of course, you might have to rewrite some job descriptions. You'll have to spend a lot more time calling on big-gift prospects and a lot less time worrying about $20 gifts. You'll have to develop more extensive donor relations programming, and your staff have to make gift acknowledgement more efficient.

That's what happened at AIDS Project Los Angeles, at Cal State Fullerton, at UCLA, the University of Arizona, the San Francisco AIDS Foundation, and dozens of other organizations who decided that their futures were on the line. They called us.

If you think that your future is on the line, give us a call. The Pacific Group, 200 Pine Avenue, Suite 503, Long Beach, California 90802 **(213) 491-5588.**

The Pacific Group
Philanthropic Outreach

Exxon immunity from the NWF's response to such a massive and poorly managed environmental disaster? The fact that Exxon has been judged a corporate pariah in the court of public opinion has little or nothing to do with the NWF. That distinction has been clearly earned by Exxon's leadership."

There are 15 members of the CCC, including officials from some of the largest corporations in America — Dow Chemical, Arco, Miller Brewing, General Motors and Monsanto. According to reports, Exxon was not a major financial contributor to the NWF. — GWW

Rockefellers Call For World Action

Birth of more foundations around the world was encouraged by Peter C. Goldmark Jr., president of the Rockefeller Foundation, at a recent conference marking the 150th birthday of John D. Rockefeller. "If they will lead — as they have so often — many of us will follow," said Goldmark.

Goldmark also challenged the largest American foundations to direct 25 percent of their annual spending to help prevent damage to the environment and seek greater economic equity between the industrialized and developing countries. If this were to happen, said Goldmark, "the top 10 foundations could provide $300 million each year."

Prince Karim Aga Kahn — the spiritual leader of 15 million Ismaili Muslims — donates almost $130 million each year to schools, medical facilities, housing and economic development. He advised Western philanthropies in the Third World to build on the power of local communities to organize, set priorities and act.

David Rockefeller Jr., chairman of the Rockefeller Brothers Fund, said this is an opportune time for international philanthropy. "Japan tomorrow could become a major philanthropic force in the world because it has the funds, it is very conscious of its image, and it also shares many environmental problems."

The three-day conference was held at the 2,700-acre Rockefeller estate in Pocantico Hills, New York, for some fourth- and fifth-generation family members. While the meeting was for descendants to honor the family patriarch, the family also felt it was an appropriate time to focus on philanthropy for the 21st century, said Rockefeller.— MN

VISA Backs Olympic Team

VISA is committed to supporting 1992 U.S. Olympians. A new donation program was set up by the consumer card company where $1,000 was donated to the U.S. Olympic Team and $1,000 to the athletic department of those schools participating in NCAA college football games broadcast on CBS.

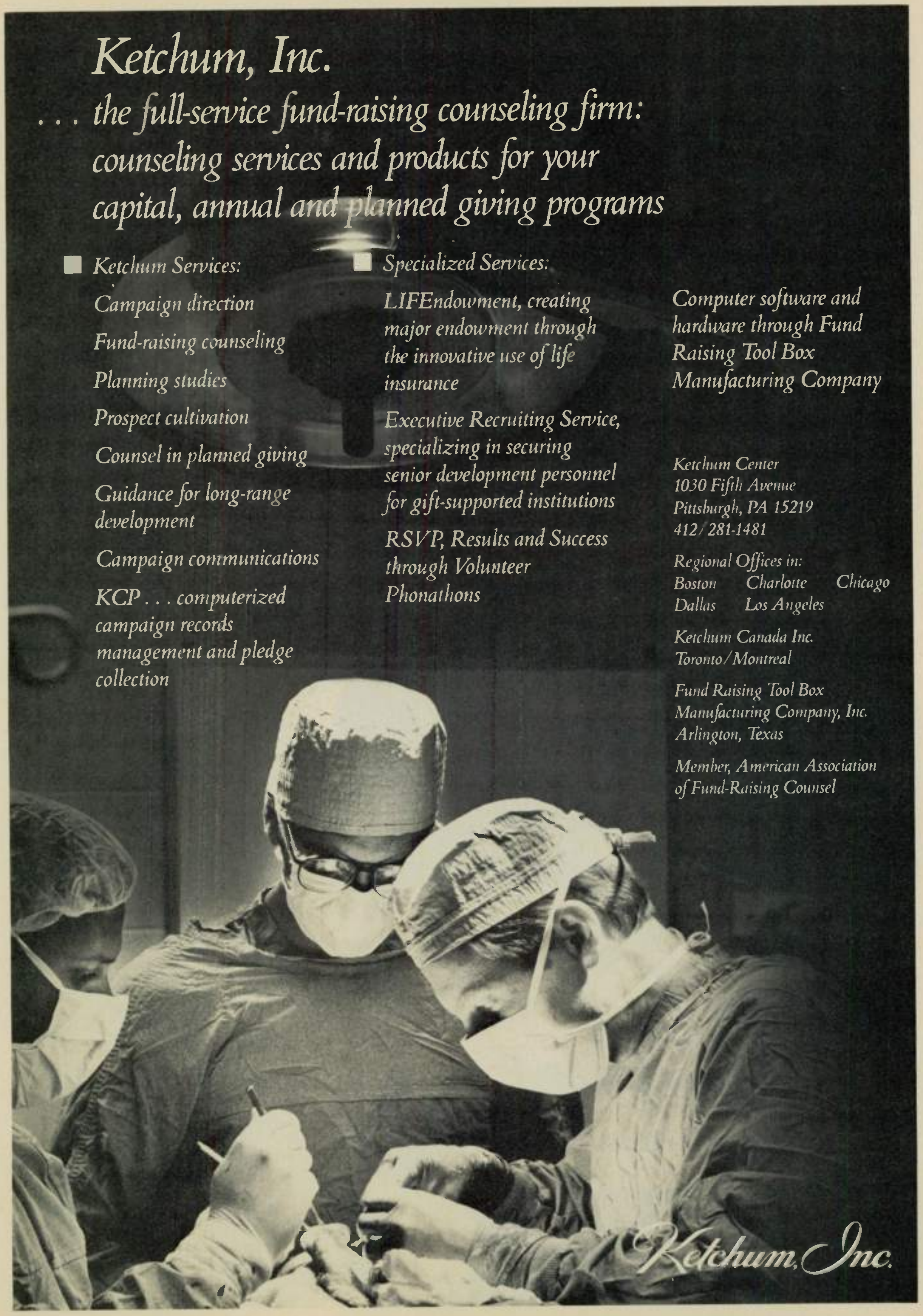
VISA ran the program during more than a dozen games this season. VISA was also a sponsor of the 1988 U.S. team. To call attention to the VISA sponsorships, the CBS network aired two 30-second announcements during each game. In addition to the CBS games, VISA also named a player of the game during ESPN college broadcasts. A $1,000 donation to the Olympic team was then made in that player's name. — GWW

Foundation Giving Rises Sharply

Total foundation giving has soared to $6.3 billion, an increase of more than $1 billion over the past two years. This is one of the findings of a new study, "Patterns of Growth in Private Foundations," which appears in the introduction to *The Foundation Directory*, 12th edition, published by The Foundation Center.

Research director Loren Renz said, "The number of major grantmaking foundations created in the 1980s has far surpassed that of the previous decade; 1,700 additional foundations have met Directory criteria — holding $1 million or more in assets or distributing $100,000 or more in a given fiscal year — since publication of the last volume. Of those, 680 were established in this decade."

Independent foundations now number 5,383 or 81 percent of the entire set. This group distributed more than $4.6 billion to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non-profits, an increase of 24 percent in current dollars since 1987. Contributions to foundations by sponsoring companies rose 26 percent to $1.2 billion. The study shows that corporate foundations donated almost $1.3 billion to non-profits, 27.6 percent more than they reported in the last study.

The number of community foundations has risen by 103, or 143 percent. Community foundations increased their total giving to non-profits by 28.9 percent to $380 million. For a copy of the study, contact The Foundation Center, 79 Fifth Ave., New York, NY 10003 — 212/620-4230.

— WO

Alternative Funds Challenge UW

The United Ways are being challenged by alternative fund movements in every region of the country, according to a new report released by the National Committee for Responsive Philanthropy (NCRP). There are now more than 100 alternative funds that are soliciting payroll deduction contributions for approximately 2,000 charities outside of the United Way (UW) umbrella. According to the report, "Workplace Giving: The New Era," these alternatives expect to raise at least $105 million in 1989, compared to the $38 million they raised in 1982. These groups range from black, female and environmental activists to health agencies, international service organizations, symphonies and operas.

What was once an aberration 20 years ago has become rigorous today, said Robert O. Bothwell, executive director of the committee. "United Way's monopoly of workplace fund raising is long gone," he said. Health and international charities started chipping away at the workplace charity drives in the '60s. Black funds organized in the '70s and recently women's, environmental and a variety of social action groups have successfully competed with UW for the hearts and purse strings of employees. These organizations deal with varying agendas, including child care, low-income housing, workers' health and safety and peace issues — controversial issues that the UW won't get involved with, says the report.

The report also notes that "the most striking aspect of this challenge to United Way's domination of workplace fund raising is the role by progressive activist organizations." Twenty years ago only one progressive alternative existed; today 51 progressive funds compete with UW for employee donations. These groups will raise an estimated one-third ($36 million) of the total $105 million that all of the alternatives expect to raise this year.

While UW's monopoly of workplace fund raising has ended with respect to government employee charity drives, the report makes clear that it is still an important factor in most corporate charity drives. A crucial point in the battle for access to employee

EXECUTIVE DIRECTORS FUND RAISING QUIZ

	YES	NO
1. **Do all of your donor prospecting programs cost less than one dollar to raise a dollar?**	☐	☐
2. **Is the average gift returned on your prospecting program $20 or more?**	☐	☐
3. **Do you have an active donor base of 1 million names or more?**	☐	☐
4. **Is your active donor base growing by 15 percent or more per year?**	☐	☐
5. **Have you successfully integrated telemarketing into your fund raising mix?**	☐	☐

If you have answered yes to all of these questions, then read no further. Your job is secure. Spend the rest of the day working on a raise!

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charity drives was the passage of federal legislation in 1987 that guaranteed the rights of all types of charities to participate in the Combined Federal Campaign of the U.S. Government. This is reportedly the largest workplace charity, reaching 4 million employees and raising $165 million last year. Almost $100 million of this now goes to non-United Way charities. For more information, contact NCRP: 20001 S St. N.W., Ste. 620, Washington, D.C. 20009 — 202/387-9177. — MN

UNCF Seeks More Male Support

The United Negro College Fund (UNCF) is using sporting events to woo more male contributors to its cause. Over the next few years the UNCF plans several sports-type sponsorships to enlarge its donor list which is currently 45 percent male.

A recently conducted Harris Poll confirmed the UNCF contribution figures. The first event planned will be a golf tournament in Lake Buena Vista, Florida, called the Bryant Gumbel/Walt Disney World Pro-Am. The event to raise funds for the UNCF is the first targeted specifically to men.

A UNCF spokesman noted that the golf tournament was specifically designed to try to attract top-level executives to the fund. The UNCF took in more than $40 million in 1988 and about $1.5 million of that came from only a few sports-related promotions. Featured in those promotions were track star and gold medalist Carl Lewis and Chicago Bulls basketball superstar Michael Jordan.

The UNCF raises funds each year to help black students nationwide offset some of the rising costs of going to college. — GWW

Tennis Tourney Benefits Rehab

Chris Evert directed a benefit tennis tournament in Boca Raton, Florida, which raised $300,000 for a local drug rehabilitation center. Evert, who recently retired from the professional tennis circuit after an illustrious 17-year career, hosted the Chris Evert/Phar-Mor pro-celebrity tennis classic, the proceeds of which went to benefit the Dick and Carole Siemens Foundation.

The foundation is in the process of building a no-frills drug rehabilitation center in Delray Beach, Florida. It was the first time that Evert lent her name to a fund-raising event. Evert explained that she could not run this type of event previously because of her busy touring schedule.

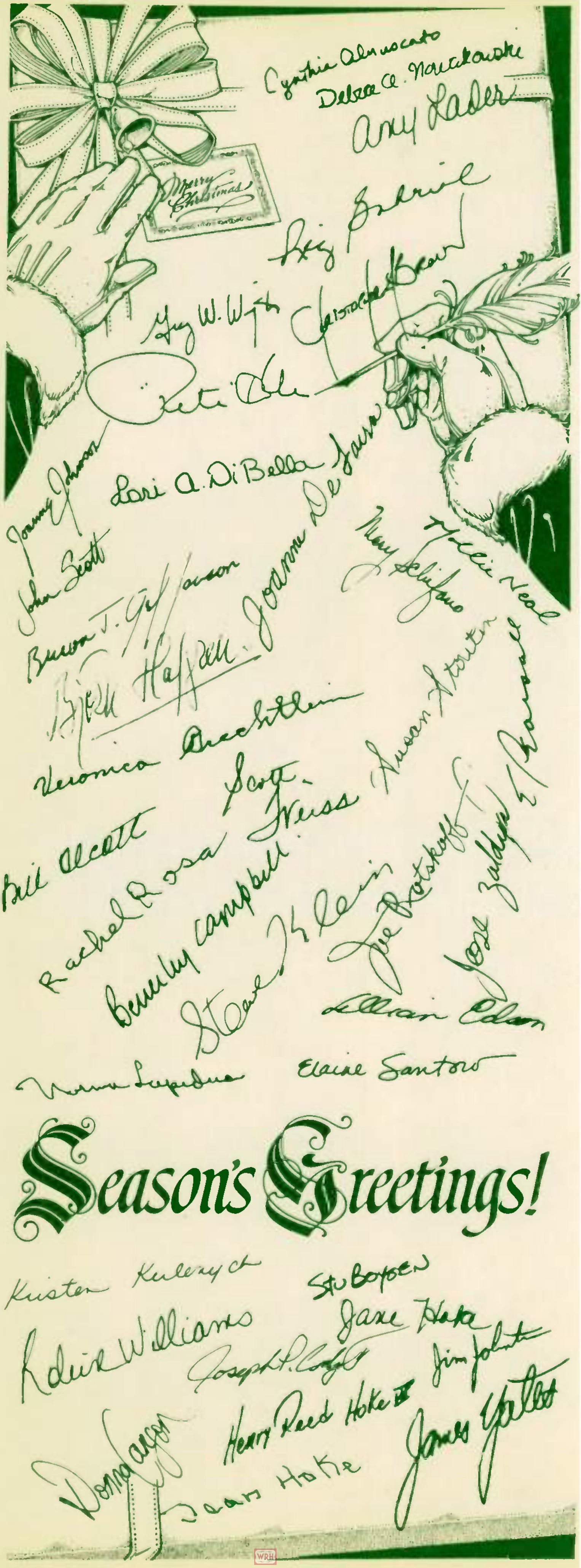
More than 5,000 $20 tickets were sold for the tourney with a $750-a-plate dinner and an auction also adding to the total funds gathered. Participants in the tourney included tennis pros Billie Jean King, Pam Shriver and Martina Navratilova; entertainers Kenny Rogers, John Forsythe and Chevy Chase and auto racer Danny Sullivan. In the finals of the tournament, Navratilova and Forsythe defeated Evert and Sullivan. — GWW

Salary Survey Examines Ministries

Christian Ministries Salary Survey is a just-released guide to benefit those in the area of non-profit compensation planning. The ninth edition is compiled from information gathered from more than 7,800 salaried staff, and for the first time Canadian salaries are also reported.

Ministries participating in the survey include churches, colleges and universities, camp and conference centers and other non-profit organizations. Data is reported for organizations by revenue, and geographic location is broken into six regions. Overall, participants spend 35.08 percent of their gross revenues on payroll. Churches with revenue less than $500,000 expend the most for payroll at 41.85 percent, while overall, non-profit's payroll is only 15.32 percent of gross revenue.

For more information, or to purchase a copy of the survey, contact Christian Ministries Management Association (CMMA), P.O. Box 4683, Diamond Bar, CA 91765 — 714/861-8861. Cost for the guide: $75 for CMMA members and $175 for non-members. — MN



Merry Christmas
Cynthia Olmuscato
Debra A. Nowakowski
Amy Lader
Peter Gabriel
Guy W. Wyeth
Christopher Brown
Pete Cole
Johnny Johnson
Lori A. DiBella
Joanne DeSousa
John Scott
Mary Schifano
Mollie Neal
Bryan J. Gaffney
Bjorn Hafjell
Veronica Brechtlein
Susan Stouten
Bill Alcott
Rachel Rosa
Scott Weiss
Beverly Campbell
Steve Klein
Joe Protskoff
Jose Zaldivar
Lillian Edson
Norma Sepulveda
Elaine Santoro
Season's Greetings!
Kristen Kulezych
Stu Boysen
Kevin Williams
Jane Hoke
Joseph P. Conforti
Jim Johnston
Henry Reed Hoke III
James Yates
Donna Larson
Joan Hoke

Non-Profit Finds New Formula

Creativity in math programs is being multiplied by a $10 million Ford Foundation (FF) project. The goal is to help 4th to 8th graders go beyond drills and rote memorization and for teachers to help pupils see real-life meaning in numbers, FF officials said.

The project — one of the largest public education programs undertaken by the Ford Foundation — is aimed especially at improving math education for pupils in poor areas. The program is slated to start in classrooms next fall with the teaching of basic skills with higher-level math reasoning and problem solving.

The project, Quantitative Understanding: Amplifying Student Achievement and Reasoning, will be directed by the Learning Research and Development Center at the University of Pittsburgh, which was given a $2.5 million initial grant. The center will select schools in economically and educationally distressed areas based on their willingness to accept innovation. The center will use part of the monies to supply schools with staff, computers and other educational materials. — MN

Singles Group Grows By Volunteering

A recently formed Long Island charity group is growing by leaps and bounds and turning heads in the area of voluntarism. Singles for Charities (SFC), Syosset, New York (516/496-7197) was started in the fall of 1988 by one woman. The group currently has 200-plus members and continues to grow.

Made up of unmarried, divorced, widowed or separated people, the group is a volunteer organization that participates in charitable programs and environmental projects. The group's founder is Jan Krivosheiw, who after suffering through a depressing holiday season the first year she was separated, decided that the next year would be different.

That next year Krivosheiw hosted international students for Thanksgiving and visited old folks in a nursing home on Christmas and found that both holidays were much more fun than the previous ones. The group's motto is, "Those who bring sunshine to the lives of others cannot keep it from themselves."

The group has run some fund raisers but according to Krivosheiw, "That became too much of a burden and too time-consuming." Recently the group has spent more of its time providing volunteers for other organizations. SFC puts out a monthly newsletter and holds monthly meetings where strategies are discussed.

Becoming a member costs $25 a year and there are some dues collected during the meetings. "We are completely non-profit. No money comes to us; it is all sent to the charities we are working with," said Krivosheiw. Because of the growth of the group — three times as many events are planned this year than last — Krivosheiw is working with SFC almost full-time.

The next major event planned will be a Singles Expo held on Long Island to benefit the March of Dimes. The event is planned for Dec. 10 and will feature 100 vendors selling products geared for singles. The vendors will pay $250 for a table and there will be an entrance fee. All proceeds from the singles night will go to benefit the local March of Dimes chapter.

In the past year SFC collected hundreds of toys during a Christmas Toy Drive for a Long Island hospital, co-sponsored a "male auction" which raised more than $5,000 for another Long Island charity, walked in a March of Dimes walk-a-thon, raised $900 for the Mental Illness Foundation through a dance and supplied 100 volunteers to assist with outdoor concerts held to benefit a local arts group.

Krivosheiw said that she still sees a large growth for the group in the coming months. "We are becoming very well known in the singles community and in the volunteer and fund-raising communities. We are continuing to grow." — GWW

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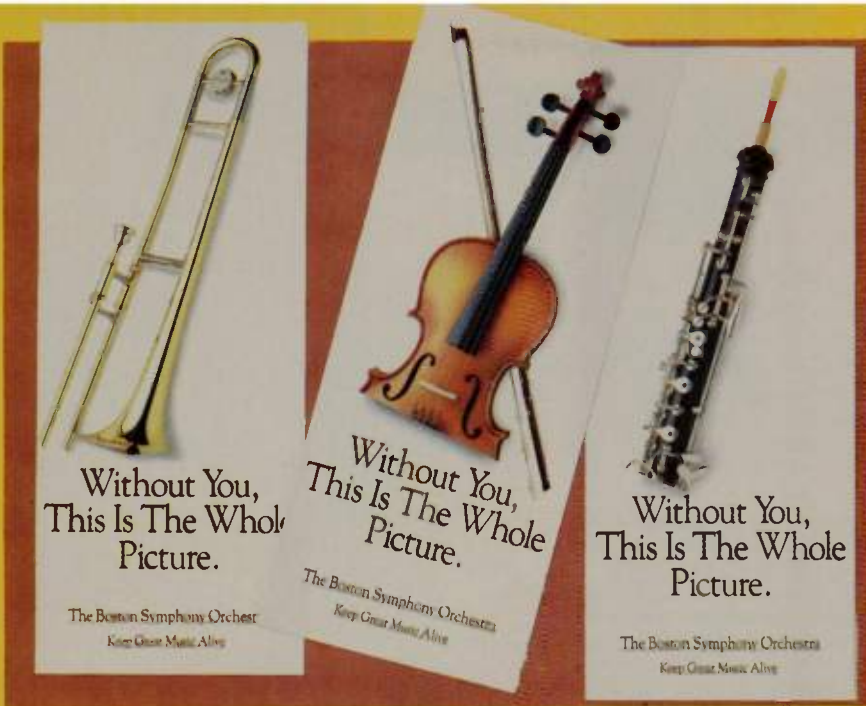


Gold — Order Generation

Symphony Conducts Winning Campaign

While many symphony orchestras have met with great financial difficulties in recent years, the Boston Symphony Orchestra has been gaining more and more financial stability. This success is directly attributable to its fund-raising drives.

The 1988 campaign — with a $1 million goal — confronted a market that is often considered to be saturated with fund-raising appeals from non-profit organizations.

The Boston Symphony was fortunate that its agency, HBM/Creamer Direct, offered its services pro bono and assisted in the attention-getting, classic mail packages.

A series of mailings was sent to four segmented groups in order to maximize response and the level of contribution. These groups included *Higgins Society Member*, past contributors of $1,250 or more; *Friend of Symphony*, past contributors; *Boston Symphony Orchestra Subscribers*, symphony subscribers who have never contributed; and *Friend of Music*, new prospects who have never contributed. Lists of existing symphony subscribers and contributors were supplied by the Boston Symphony Orchestra. The new prospect list was compiled by the agency from three lists: RCA Classical Compact Disc Club, *Ovation* magazine and Musical Heritage Society.

The four-part direct-mail campaign was conducted over a six-month period. Each group received an initial 10½-by-4½-inch package consisting of an outer envelope, versioned cover letter, color brochure, flyer promoting corporate matching gifts, personalized reply card and reply envelope. Each subsequent mailing included a new cover letter, the response elements and a brochure with a new cover that carried the campaign theme — "The Whole Picture." Depicted on the outside of each brochure was half of a musical instrument — violin, oboe and trombone — and copy: "Without You, This Is The Whole Picture."

Included in the beige brochure was copy, which acted as an incentive for people to donate. For example, those who donated more than $100 received Symphony Shop discounts, a free subscription to the organization's newsletter, priority notice to opening night gala concerts and special recognition in the program book. These incentives were broken down for those who donated $50 or more, $100 and more, $150 and above, $350 or higher, $650 and above and $1,200 or more. Also, copy noted appreciation of gifts of securities and reminded the recipient that "gifts to the Boston Symphony Annual Fund are tax-deductible to the full extent of the law."

Response to this campaign tallied 38 percent — a 20 percent increase over the 1987 response. It was projected that when all of the contributions are totaled, donations would reach $1.7 million.

Agency: HBM/Creamer Direct
Creative director: Frank Parrish
Art director: Margaret Hart
Assistant art director: Paul Tonelli
Account manager: Tracy Mahoney
Production manager: Carol Blanchard
Client contact: Sue Tomlin

Bronze — Mail

Packing Them In

Pack Expo is a biannual conference developed and marketed to professionals in the packaging industry. It is one of the largest gatherings of packaging professionals in the United States, featuring 65 seminars and more than 600 exhibitions of state-of-the-art technology, machinery, materials and services.

The objective of the Pack Expo 1988 promotion was to overcome a declining conference registration, increase the average fee per conference package and develop an imaginative, integrated campaign to be incorporated throughout the mailings that people would remember.

The target audience for the direct-mail campaign remained a constant from previous years: marketers, designers and engineering professionals responsible for the creation and development of packaging concepts and technologies.

The direct-mail campaign was sent in three waves. The lists used for the first rollout included selected members of the American Management Association, Society of Packaging and Handling Engineers, The Packaging Institute International and Packaging Machinery Manufacturers Institute and attendees to previous packaging conferences and subscribers to *Packaging Engineering* magazine. Wave two was sent to all recipients of the first mailing and prospects were also gleaned from *Packaging Digest*, *Food & Drug Packaging*, *Paperboard Packaging* and *Printing Packaging*. Wave three was sent to the same lists selected for wave one. The mailings were dropped in June, August and September for the November conference and exhibition.

The elements in each wave varied, but the imagination theme was carried throughout. The first mailing was sent in an envelope containing a 7-by-8½-inch, eight-page foldout pamphlet with a navy blue background and gold print: "Imagination! Call it innovation. Call it creativity. Call it vision. Call it mere resourcefulness...or sheer genius. It's imagination. And it's waiting for you at the PACK EXPO '88 Conference and Exhibition..." Inside the pamphlet blue copy was used to describe

(continued on page 20)

the different seminars and payment rates.

The second mailing was an "imagination" booklet saddle stitched inside of a foldout. The inside of the foldout featured colorful animals working busily on a rainbow making machine. The booklet featured detailed information on the seminars and included conference and hotel/motel registration forms and airline discount information in which the animals were playing throughout. The third wave was sent in the form of a self-mailer with conference timetable and a perforated business reply card.

Results for the $174,000 promotion were very favorable for American Management Association, which conducts the Pack Expo conferences. More than 1,700 people registered for the Expo — 210 more than projected. AMA garnered $248 per registrant — 9 percent over objective. Attendee revenue was $395,695, which was 16 percent over objective. A promotion expense-to-revenue ratio of 44 percent was also achieved.

Agency: Kirk/Marsland, Inc.
Illustrations: J. Richard Kirk
Copy: Lawrence Marsland
Client: American Management Association
Marketing manager: Vincent Amen
Assistant marketing manager: Lynne Oliver
Program director: Richard Akagi
Art director: Blanche Fiorenza
Mechanicals: Joseph Cassisi

The mailing featured a cutout skyline at the top and a yellow Lego brick in the center.

Silver — Magazine

Saving The Rain Forest

Where can you go to see 600 different trees, 300 kinds of orchids, 200 fern species, 500 butterfly species, 30 different hummingbirds, bare-necked umbrella birds, keel-billed toucans, anteaters, monkeys, mountain lions and jaguars? The rain forest. Ironically, it is a beautiful place that emulates the colors and sounds many people dream of and it is being burned and bulldozed at the rate of four city blocks per minute.

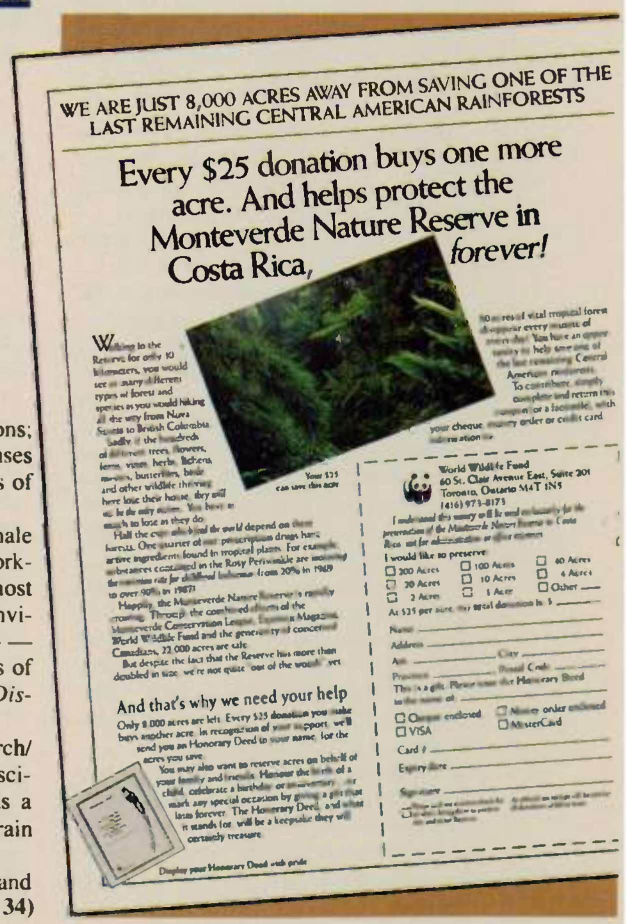
The World Wildlife Fund launched a campaign to support the Monteverde Rain Forest Nature Reserve, which encompasses 22,000 acres of tropical forest in Costa Rica. Using a grassroots initiative instead of turning to the government for funds, the program was launched. To ensure success, the campaign had to change a perceived lack of cause and effect with donations; overcome the low priority of wildlife causes in donors' minds; and create awareness of the Monteverde Reserve.

The target audience was male and female white collar, skilled and professional workers who are 18 years and older and, most importantly, are concerned about the environment and conservation issues. Also — fitting under this description — readers of *Equinox, The Magazine of Canadian Discovery*.

A full-page ad was inserted in the March/April 1988 issue of *Equinox* travel and science magazine. Also in that issue was a 12-page article on the Monteverde rain forest, thus reinforcing the cause.

The ad was predominantly black and

(continued on page 34)



Bronze — Mail

Building A Class Community

The United Way of Greater Milwaukee felt as though it had not been keeping pace with the community's growth, economy or need for social services. During the past five years, the number of employees solicited had increased 25 percent, but the number of contributions had decreased by 6 percent. Donations to the non-profit organization had been slowly declining, so the organization took action.

The 1988 campaign was launched with a "Building A World Class Community" theme. To increase community and volunteer awareness, a slick party invitation was created to encourage people to attend the kickoff of the $22.3 million campaign. This mailing was important in that it helped "rally the troops" and set the tone for the fund-raising season.

The 11½-by-5-inch mauve and white mailing featured a cutout skyline at the top and a Lego brick in the center. The copy invited attendees: "We can build a world-class community. Bring your Lego brick and help lay the foundation for our construction project — The 1988 Greater Milwaukee United Way campaign." Also included in the mailing was a response card with a request for $10 for each attendee. Subsequent to the response, a mauve and black ticket was sent which was to be exchanged at the opening party for a picnic box supper and a build-your-own sundae. The Lego brick was also to be brought to the Zeidler Park party where they used the "bricks" to build the word Milwaukee.

This mailing went to a list of targeted volunteers, supporters and business community leaders which was compiled by the United Way. Cost for the 8,000 invitations was almost $12,000 — the only fee for the kickoff, since the Legos were donated. Response was high — with more than 500 people attending the party. In turn, more than $22 million was raised during the fund-raising season — more money than the United Way of Greater Milwaukee had ever raised before.

Partial production supplied by Wisconsin Electric Power
Art studio: Art Factory
Typography: Zahn-Klicka-Hill
Pre-press: Lithoplate, Inc.
Printing and die cutting: H M Graphics, Inc.

Bronze — Mail

Guiding Funds To Guide Dog Users

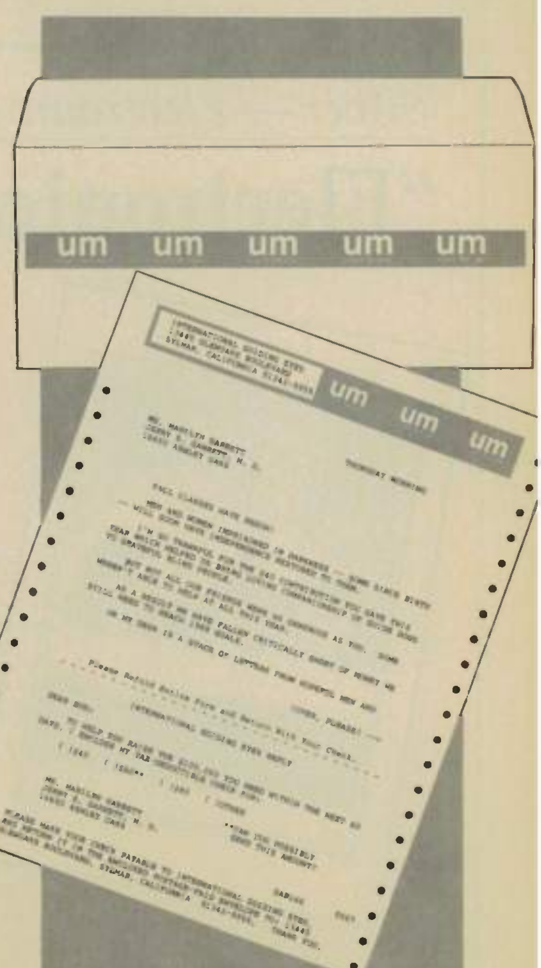
Getting people to donate to an organization is difficult enough, but getting them to "dig deeper" in their pockets to give some more is the unenviable task that a California-based foundation for the blind undertook and made successful.

A mailing put out by International Guiding Eyes (IGE), Sylma, California, sought additional financial support from the group's members for the purpose of training guide dogs and then pairing them with blind people in need. The group also trained people to use the dogs.

A direct-mail piece was sent to 6,050 previous donors which contained an "urgentgram", a #9 carrier and a one-sheet/two-page personalized letter and reply combination. The targeted donors had previously given contributions of at least $5 to IGE through the mail or other fund-raising activities. The additional funds were needed to cover a 1988 budget shortfall and close out the financial year.

The mailing proved very successful with an 8.2 percent response rate. The average gift received was $50.63 and the entire campaign showed a $36,251 profit for IGE after the mailing's cost of $3,984 was taken into consideration.

Agency: Targeted Communications Corp.
Strategic development: Andrea Gaines, John McCracken, Donna Gerdin
Artist: Baker Johnson
Copywriter: Donna Gerdin
Production director: Ruthann Powell



A red band across the envelope and the top of the letter added a sense of urgency to the appeal.

Gold — Catalog

Save The Children Catalog Scores Big

Save the Children has stressed the importance of family for many years through its work to improve the lives of children from poor backgrounds. However, spreading the word of the group's cause and raising enough from donations to keep them going has been an ongoing challenge.

To familiarize consumers with the group's work, two catalogs are mailed each year — one for the holidays, the other in the springtime — which offer crafts for sale and discuss the Save the Children philosophy.

In 1988, 497,000 fall catalogs were mailed out to past catalog shoppers, donors, sponsors and contributors, and names purchased from not-for-profit mailing lists and general merchandise female catalog buyer lists. Stressed in the 1988 fall catalog

Highlight of the catalog was photos of children and notes about countries where crafts were produced.

Silver — Electronic Media

"Electronically Yours"

In an effort to raise funds for worldwide UNICEF programs, the children's fund offered subscribers to MCI/RCA's Global Telex and Video system a Christmas and Easter seasonal greeting that is directly adapted from a current UNICEF greeting card.

Different designs are offered for each holiday, and telex and videotex subscribers receive messages on their machines telling them how they can access the designs and that MCI will donate a sum of money, ranging from $1 to $2 depending on location, each time a UNICEF design is accessed from the communication companies' central database.

The project was not only to raise funds for UNICEF but also to raise public awareness for the greeting card program. The awareness campaign has worked as the program has grown rapidly since its inception in 1986.

A total of 16,565 accesses have been recorded to date, resulting in $22,637 being donated to the children's fund with absolutely no cost to UNICEF.

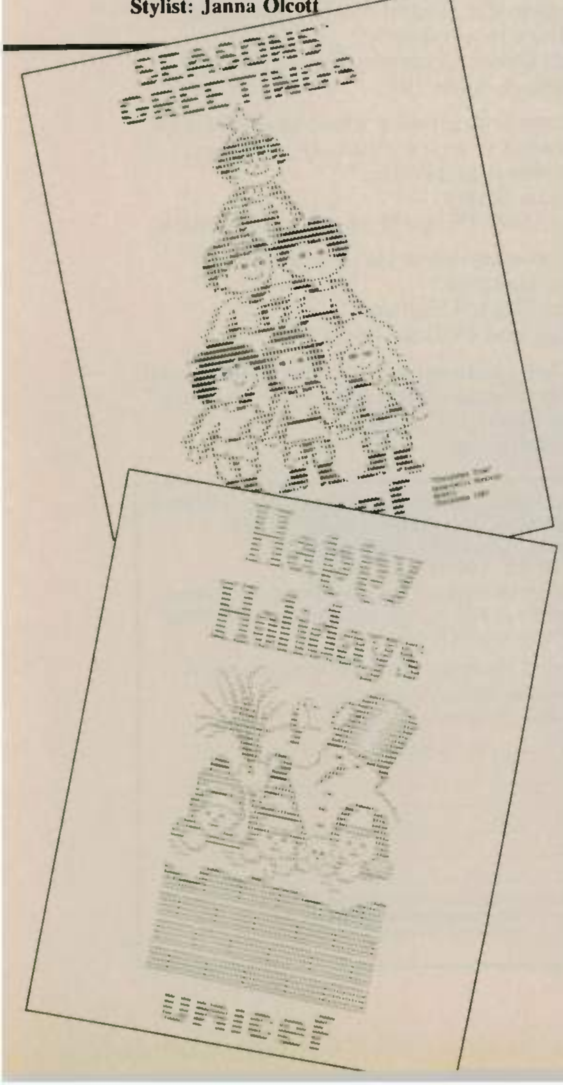
Campaign directors: Richard Pordes (UNICEF), Ralph Mannheimer (MCI)
Product Manager: Kathy Segarra (MCI)
Marketing coordinator: Elaine Hamilton (MCI)
Computer design: Richard Horner, Electric Canvass

were 153 international handcraft/folk art items that were offered at moderate retail prices.

The catalog also gave the consumer the opportunity to contribute to Save the Children, which has been around since 1932. Activities of Save the Children are highlighted throughout the catalog with photographs of children and program notes about the group's involvement in the countries from which the crafts originate.

Response to the catalog campaign was excellent as 22,215 orders were received from the overall mailing of 473,363 catalogs for a 5 percent response. Because of a $50 average order the group achieved $1,110,750 in gross sales which represented a 23 percent response increase and a 14 percent average order increase from the 1987 fall catalog. More than $50,000 in donations were also generated from the mailing. The fall catalog was mailed on Oct. 23, 1988.

Agency: Presentations Inc.
Creative director: Susan Edmondson
Design: Andrew Cantor Designs
Copy: Haren Zweibel
Photography: Bie Bostrom
Stylist: Janna Olcott



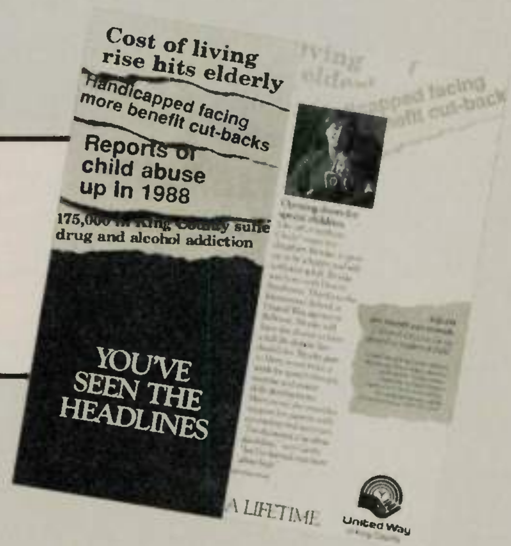
Silver — Mail

Showing The Results Of Charity

Not being able to actually see results from donated money is one of the reasons many people do not give to charity. Overcoming this obstacle was the target of an award-winning marketing campaign undertaken by the United Way.

The United Way of King County, Seattle, Washington, set a goal of raising $500,000 in donations and increasing its past donor response 35 percent, from 37 percent to 50 percent. In order to show its targeted group that the United Way really works, a mailing was designed highlighting past successes of the organization.

United Way brochure showcased four winning campaigns involving drugs, child abuse, elderly and handicapped.



The mailing showcased four winning campaigns: winning the war on drugs, breaking the cycle of child abuse, helping senior citizens stay healthy, active and independent, and a section on opening doors for special children. All these topics were featured in a United Way brochure.

Along with the brochure, a letter was mailed that focused on a heartrending case study to demonstrate the need for United Way agencies. The letter included a response form for those wanting to donate and a postage-paid envelope.

United Way targeted a consumer audience of past donors and non-donors living and/or working in King County and a business audience which also included past donors and non-donors, employed in businesses with 5-25 employees in King County. Direct mail pieces were sent to 7,800 past consumer and business donors and 111,000 consumer and business non-donors. Names were taken from March of Dimes and American Lung Association lists as well as United Way lists.

Response to the mailing was excellent. A total of $506,000 was raised and past donor response jumped from 37 percent to 66 percent. The total project cost the United Way $47,000 for production and postage and the agency fee was donated.

Agency: Herring/Newman Direct
Copywriter: Terry Short
Art director: Janet Somero
Creative director: Bruce Bulloch
Account supervisor: Mary Ward-Smith
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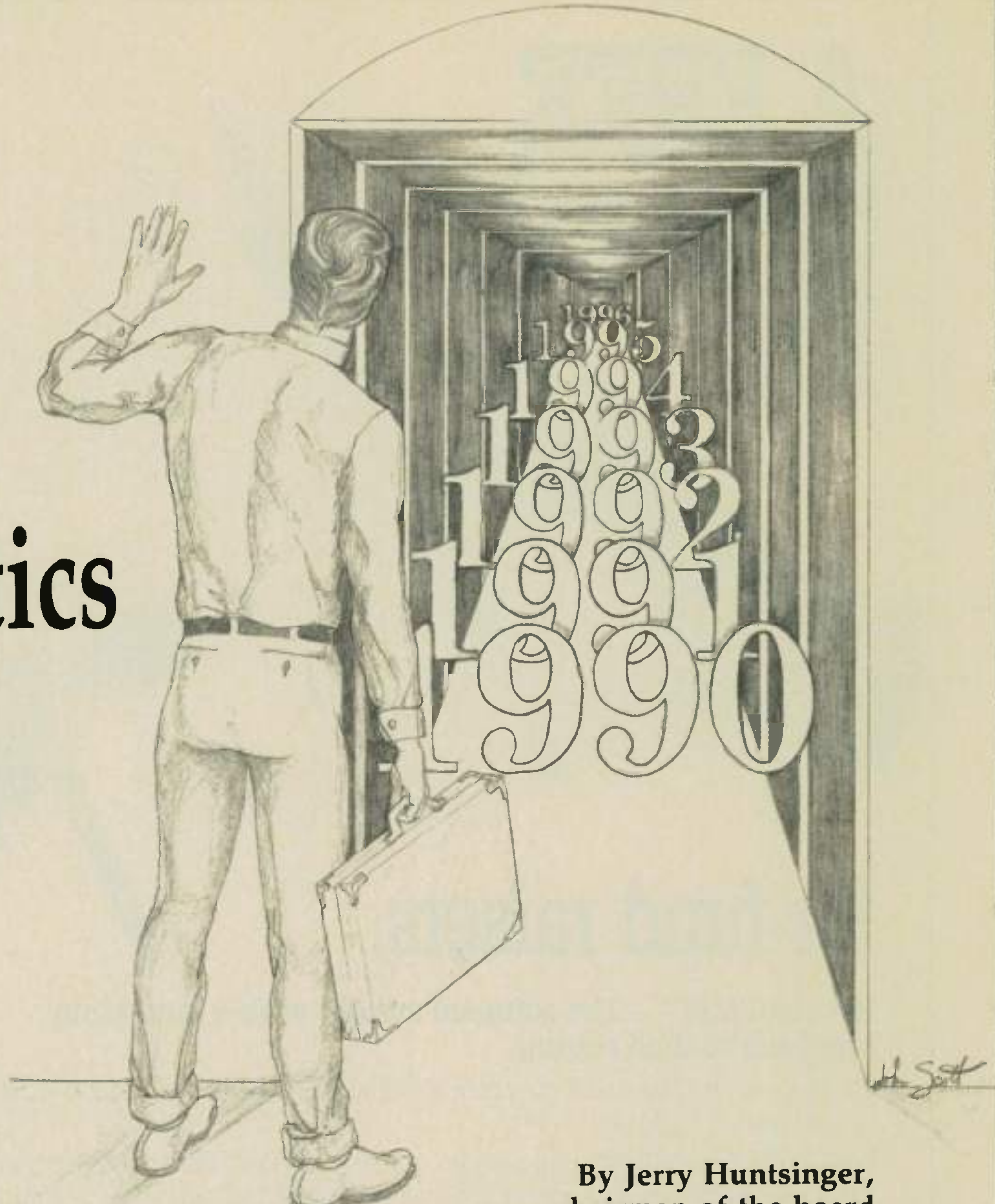
1990:

Year Of The New Mathematics



How much can you afford to spend on a new donor? You better learn, and fast. Because the new math calls for an investment concept. And that's not all that's changing in direct-mail fund raising.

By Jerry Huntsinger, chairman of the board
Huntsinger & Jeffer, Inc.

Last year at this time as I looked deep into my crystal ball, I heard a soft voice say, "1989 will be the year to stop singing the blues."

But alas, most direct-mail fund raisers ignored my prediction and they continued to "sing the blues."

And apparently, I was wrong because instead of being a year of tremendous growth for non-profits, the meltdown of 1987 and 1988 continued all through 1989. For many organizations, prospecting for new names deteriorated to the point where they simply stopped mailing all but a few prime lists.

Meanwhile, back in the computer room, results showed that donor attrition continued and for some groups even accelerated. Drastic measures were attempted to make donor house lists work:

- — mailing less often
- — mailing more often
- — writing shorter letters
- — writing longer letters
- — trying premiums
- — eliminating premiums
- — increasing personalization
- — decreasing personalization

And through it all, no clear-cut pattern seemed to emerge. 1989 has been a fantastic year for some organizations, while for many more, it has been a year of defeat.

I have expected at any moment to hear about a leading direct-mail fund raiser ripping off his clothes at a marketing conference, heaping ashes on his head, looking at the sky as did Job of old, and asking, "Why me, Oh Lord?"

At the risk of sounding smug, I think I have an answer to that question. And here it is:

During the "golden years" of direct-mail fund-raising prospecting, our packages worked, not because they were very good, but because they were so very cheap to produce and mail! And that encouraged us to mail more and more and more and more, and many of us laughed and laughed and laughed when we heard stories about a donor receiving six pounds of fund-raising letters a day.

"Serves her right," we said. "She made

Illustration by John Scott

a contribution or her name wouldn't be on the prospecting lists." And we kept mailing and mailing and mailing, until one morning we all woke up and discovered that:

a. The cost of mailing a package had gradually increased over the years — printing, lettershop, salaries, computerization, list maintenance, and especially postage.
b. The universe of prospective donor names that we had always considered to be "an unlimited universe," was actually a rather small marketing core of five to 10 million households.
c. The dear folks who so patiently read our letters and sent in their checks, began "passing over to the other side."
d. And we all had been too dumb and shortsighted to figure out how we were going to replace those donors when they were all dead.

And that's where we are right now, as 1990 begins and we face the challenges of a new decade of direct-mail fund raising.

Actually, my first prediction for this year comes from the past 20 years of landscape gardening here in my Hanover County, Virginia, farm of 300 acres.

When I started designing my garden beds, pathways, streams and lakes, I depended heavily upon the construction of drywall fences to tie the various areas together. And the stone of first choice is what we call a "field stone," usually found right on the surface of the ground or sometimes covered with a few inches of dirt.

I collected these stones and put them in great piles and built miles and miles of fences. So much field stone!

Once in a while my gardener, Lazy Eddie, would warn me that he had to go deep into the woods to find new sources of stone, but I ignored him because my denial system prevented me from even considering the remote possibility that I might one day have 300 acres of land and no more stones.

Finally, that happened and my choice was either to stop building fences or dig deeper into the ground for buried stone or even consider using split rails or some other material.

And that's where I had to learn some new mathematics. It's fairly cheap to just walk through the woods and pry up rocks and throw them into the front-end loader. But to dig takes larger equipment. And to buy stones from the local quarry is very expensive, and the cost of split rails for fencing is almost prohibitive. But what am I to do? Give up my hobby? Sacrifice the already pitiful salary alloted to Lazy Eddie? It all calls for a whole new approach to the mathematics of landscape gardening.

And the same goes for direct-mail fund raising. We've depleted our donor pool. It was not infinite. But do we quit? Or do we dig deeper and search for a new kind of donor? And what will it cost to enroll that donor?

That's exactly where the new math comes in. Are you still trying to find new donors at a profit? Or break even? Some lucky organizations still achieve that goal. But not many.

Most prospecting in the 1990s will be at a loss. Depressing, isn't it? But wait. Maybe not.

How much can you afford to spend on a new donor? Bet you don't know! You better learn, and fast. Because the new math calls for an investment concept.

Prediction #1: In brief, it's my prediction that the organizations who do the best job of handling the new math will be the ones who will be the most successful in the last decade of the 20th century. Sounds pompous, doesn't it? But I'm serious. This is no gentle, ironic, tongue-in-cheek, mildly deceptive attempt to entertain the readers of this magazine.

"I have expected at any moment to hear about a leading direct-mail fund raiser ripping off his clothes at a marketing conference, heaping ashes on his head, looking at the sky as did Job of old, and asking, 'Why me, Oh Lord?' "

With that rambling preamble, please let me share some more predictions with you.

Prediction #2: Direct-mail fund raising, along with some other forms of direct response marketing, including certain aspects of telemarketing, is in line for some severe public criticism this year.

Non-profit organizations have always assumed that their direct-mail piece to their donor was full of so much friendly persuasion that the donor received a warm feeling just by seeing the corporate logo on the carrier envelope.

But it may come as a shock to some fund-raising executives that instead of their direct-mail piece being received with tiny screams of delight, instead, donors may be viewing it with open hostility or even worse, just ignoring it entirely.

Prediction #3: Many non-profit organizations will be forced to take a new look at the services they provide to American society.

As the financial base continues to erode, the more farsighted executives are going to be studying the confusing overlapping of services. Sometimes, about all that seems to separate one organization from the other is the headline on the letterhead. This results in a lot of mailbox clutter, because these overlapping organizations tend to look the same, smell the same, feel the same, talk the same... .

But while the more benevolent donor of the 1960s and 1970s had almost complete faith in the integrity and mission of the organizations, today's donor is developing more insight, discernment, and has a broader grasp of the social trends around the country.

Prediction #4: The agony of postal rate battles will continue.

By the time this issue of *Fund Raising Management* reaches your office, the postal rate picture will probably be as unclear as it has been for the past few years. You can depend on increases, but that's not really the problem. The problem is *delivery*!

Back in the days when third-class non-profit rates were dirt cheap, delivery was not a problem. But today, if you want to reach your donor file and you send your letter by non-profit postage, a substantial portion of your file will never receive your letter!

The percent of delivery seems to vary with each study that is done. But apparently, about 30 percent of non-profit, third-class mail reaches the home very late or not at all. And that of course is why more charities are turning to first-class mail, which represents a significant increase in the promotion budget.

Prediction #5: Direct-mail fund-raising prospecting will continue to decline.

You don't have to be a financial genius to understand why this must occur. It's the "black hole theory." The rental lists that have historically worked the best for non-profit mailers are no longer adding as many new donors, which means that the lists are becoming stagnant, overused, saturated, with percent of response going down and the average gift going down. The list collapses internally. A black hole.

I think this trend will continue during the 1990s, until the new mathematics is firmly in place and non-profits are mailing smarter with less emphasis on volume and more concern about the quality of the donor being enrolled.

Prediction #6: Phony direct-mail fund raising will begin to disappear, thank goodness.

What's phony? A financial crisis when an organization has money in the bank? A matching-gift campaign when the organization will actually receive the major gift, regardless of the amount given by small donors? A heartbreaking story and picture about a five-year-old child, even though children represent the most insignificant aspect of the charity's operation?

I think that a lot of "self-policing" is going to happen, basically because today's new breed of development officer is asking some very probing questions about direct-mail fund raising. This will probably result in a lot of whistle blowing, finger pointing, witch hunting and casting of stones. Maybe it's about time.

Prediction #7: A new creative quality will gradually creep into direct-mail fund-raising letters.

During the past 20 years, fund-raising letters seemed to come in two extremes. There was the blatant teaser copy "Postmas-

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FM

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Title

Company

Size of Existing Program

Address

City

State Zip

Phone

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ter: Delivery Immediately Or You May Lose Your Job." "Addressee Only: Dated Materials Enclosed." "May 25: Absolute Deadline." "Open Immediately Or A Child Will Die Tomorrow." "Win A Free Trip To The Bahamas And Help Fight Cancer."

At the other extreme was the noble letters reciting the boring history of the charity, lauding the founding fathers and laboring the "case statement."

Unfortunately, the first extreme tended to test out better, but also tended to burn out the mailing list and may be the reason why many donors are faintly hostile to direct-mail fund raising. (Have you ever been puzzled why donors will criticize you and at the same time send a check? It's because they really want to participate in worthwhile projects. They enjoy giving their money away! It gives them satisfaction! But they are beginning to see through the spurious techniques.)

But the new trend I see coming is what I call "creative quality," in that the envelope and letters no longer need to shout, warn, threaten, abuse, scream, beg, and the copy no longer needs to be overwritten, overdesigned or even overwhelming.

Instead, the copy relates strongly to the needs and the desires of the donor. The copy becomes credible. Straightforward. Perhaps even larger typeface! It becomes readable. Simplified.

Do you really want, on your donor list, a group of people who can be browbeaten by teaser copy and phony deadlines? What have you gained after you receive their average gift of $7.13?

Prediction #8: Direct-mail fund-raising copy will become more distinctive in interpreting and identifying specific organizations.

Most of the techniques that have worked well historically have been the result of certain tested formulas. And organizations that did a lot of prospecting followed these formulas because they were looking for the highest percent of response possible and practically ignoring the average gift.

This is one reason why many successful fund-raising control packages tended to be so similar. It made sense then.

But today, if we apply the new mathematics, it means that we have to search for donors who have a unique interest in a specific charity, and that will call for a more highly individualized type of prospecting — where the organization invests in these higher quality donors.

Prediction #9: List exchanging, as we know it today, will rapidly disappear.

After a charity has applied the new mathematics and invested in a higher quality donor and developed a unique, one of a kind, creative approach, they may be reluctant to share that donor with the charity next door!

Prediction #10: The present standard techniques of personalization will become less and less effective.

I don't think that donors are nearly as intrigued by references to their past giving history as we think they are. How can the executive director of a major organization know that you gave a $17 gift in 1987 and haven't given a gift since? It's phony isn't it? Not unethical, not illegal, not misleading, not deceptive. It's truthful. But it sounds phony.

And when I get a personal letter addressed to J. Huntsinger, then I know for certain that I am being gently conned again by the computer programmer. And when my name is imbedded three times in the first page of a personal letter, I know that I'm being "personalized." Computer-produced personalization can be crafty — but never compassionate — without some remarkable new definitions of just what personalization is really all about.

Prediction #11: Your donors will continue to get older.

That's so obvious that I risk sounding dumb to even mention it, because it wouldn't really matter if you were replacing those older donors with individuals of the same quality. But that's not going to happen. I think we all realize that the so-called "baby boomers," who are now reaching maturity, represent the largest single challenge in direct-mail fund raising.

But after reading about everything I could find on the subject, which unfortunately is not a whole lot, I don't think anyone really understands how we are going to persuade and motivate those baby boomers. Lots of "authorities" have lots of theories, but no one seems to be enrolling them in significant numbers. Except for: (Take a deep breath and sit down because this is going to rattle some basic assumptions.)

Except for: the child sponsorship organizations! These groups depend primarily upon the "baby boomers," and they find them in magazine advertising, TV, radio, and almost never in the traditional direct-mail donor prospecting files. Why do the boomers like to sponsor a child? Because this provides the ultimate in involvement — a one-to-one child sponsor relationship.

Through the years I've worked with Christian Children's Fund, Foster Parent's Plan, and now the fastest growing sponsorship group in the country, Children International in Kansas City, Missouri. And I've always been amazed at the youthful enthusiasm of the sponsors. They know rather precisely what percent of their money goes to fund raising and administration, what percent the child receives, and when they receive letters from a youngster, they are both enthralled and involved.

However, there isn't too much danger of a flock of new organizations springing up overnight offering a sponsorship program, because the administration needed to make it work is a nightmare and theoretically it's almost impossible to get started, since it may cost as much as $125 or more (!!!!) just to enroll one baby boomer sponsor.

"If you can enroll one donor who gives an average gift of $30, you are far, far ahead of the organization who enrolls three donors with an average gift of $10. It's all part of the new mathematics."

In other words, the only reason I bring this subject up is to point out that the sponsorship groups have been successfully using the "new mathematics" for a long period of time. And while the other charities are "singing the blues," they move along at a steady pace.

Prediction #12: Donor involvement (premiums) will come on strong in 1990.

This is because donor involvement, whether it's a sponsorship appeal or an American flag decal — is going to be essential.

Meanwhile, the traditional development officer — who has been trained in the school of what I call, "case statement detachment," will continue to view the purpose of a non-profit organization to be a barrier between the donor and the recipient of the gift. Smarter development officers will view the purpose of the charity to be a living conduit.

An involvement device of some kind helps eliminate the barrier and gives the donor more direct contact with the purpose of the organization.

Prediction #13: Higher standards of donor fulfillment will be the goal of non-profit executives.

This is another obvious result of the "new mathematics." When you pay more to enroll a donor, you are going to spend more to keep that donor, and that donor will then reward you with a substantially higher average gift.

Prediction #14: Fund-raising letters are going to get shorter.

This is not necessarily because shorter letters work better than longer letters, but when nothing really works, then the boss is going to be happier with a shorter letter and so that's how the decision will be made. However, with the use of authentic personalization and stronger educational involvement devices, shorter letter copy may even test out better.

Prediction #15: The "classic" direct-mail fund-raising package will be subjected to severe re-evaluation.

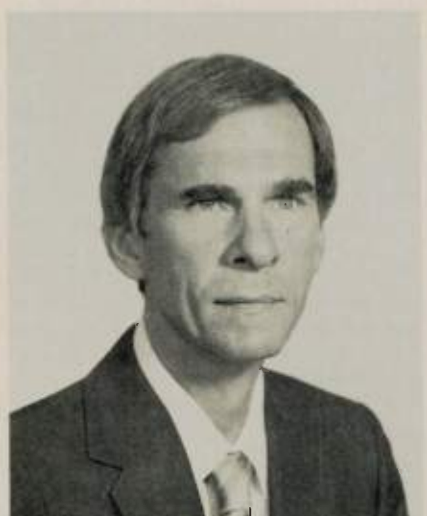
Already, magazine subscription renewals are successfully using two-part card mailers with no letter, no reply envelope and no carrier envelope! Some organizations are finding that donors in the $25-and-up range respond better when the traditional reply device and reply envelope is omitted entirely. Why? Because the mail package suddenly becomes much more intimate and personal and much less promotional and predictable.

All of us in this business have been pressured by production techniques, and most organizations would rather have a standard reply device and reply envelope in order to facilitate the "back room" — than risk a non-traditional format and go for a higher average gift.

However, I think this is going to change, because donor files will get smaller and as we are less driven by numbers, overhead will be reduced, substantially. If you can enroll one donor who gives an average gift of $30, you are far, far ahead of the organization who enrolls three donors with an average gift of $10.

It's all part of the new mathematics.

And it's going to happen in 1990. ●



Jerry Huntsinger, often called the "Dean" of direct-mail fund raising, is chairman of Huntsinger & Jeffer, Inc., Richmond, Virginia, and West Coast Direct Response, Inc., Los Angeles, California.

Volunteers Are At The Heart Of Change In America

Focus on the 1,000 points of light initiated by President George Bush to bring out the goodness and generosity of the American people was an underlying theme throughout the recent 1989 Independent Sector (IS) Annual Meeting and Assembly held in Pittsburgh, Pennsylvania.

More than 500 members of non-profit groups, grant givers, charitable organizations and universities attended the three-day conference. Gregg Petersmeyer, director of the White House Office of National Service, addressed the audience. "The IS is a significant force for change," Petersmeyer said, referring to the group's 825 member organizations. Discussing many of the scourges of American life — illiteracy, dropouts, AIDS, homelessness, unemployment, the lonely — Petersmeyer said that good people volunteering their time and money is at the heart of bringing about change.

He mentioned that President Bush will be starting a new group outside the White House to deal with the problems. "We are talking about changing people's hearts and minds. This must be a movement, not a program," Petersmeyer said. He added that five conclusions can be drawn about problems facing the nation: 1. The disintegration of communities is fueling the fire; 2. Action must be taken to solve the problems; 3. The government's role is critical; 4. The United States must band together and not argue about politics of issues; and 5. There must be an impulse to help others.

Petersmeyer also called on people to volunteer. "Builders should form consortiums to build affordable housing; farmers should make surplus food available; families must be dedicated to their communities; and the media needs to get the word out." The White House employee also said that those aged 5 to 25 will be called on to lead these efforts.

During the education portion of the conference, numerous concerns were raised over today's education system in the United States, especially grades K-12. William Woodside, CEO of Primerica and an education advisor, noted that 1,100 abortions, 1,300 births, five murders and five suicides are being accounted for daily in America's schools. Woodside also said that the country's lack of education could destroy it. "We need to attack poverty by increasing prenatal care and feeding programs, and improve teacher quality by developing teaching standards, providing adequate compensation and decent working conditions," Woodside said.

He added that people who are experts in certain aspects of the private sector must be willing to teach. Dr. John Porter, acting superintendent of the Detroit school system, noted that if you improve the urban classroom, you will improve all classrooms. "We need to provide incentives, give the capacity and better use technology," said Porter. Woodside added that what the country needs is a "Mayo Clinic of Education," to be a center for learning as we head into the 1990s.

One of the major IS goals is to beef up the Give 5 campaign. The campaign refers to an individual giving five hours a week and 5 percent of their salary to a charity of their choice. Forty-two million dollars was given in time to the campaign by the media in 1988, including print ads running in *Sports Illustrated*, *Money*, *Newsweek* and *U.S. News & World Report*. In 1990 IS will begin its second Give 5 survey to measure results of the program. According to Eugene Dorsey, newly elected chairman of IS for 1990 and head of Gannett Corp., "We want measurable growth in the program. We need to think globally and act locally."

The IS balance sheet shows assets of \$4,643,793 currently; compared with \$4,828,421 as of the end of 1988. The Give 5 campaign will be chaired by C. Richard Yarbrough beginning later this year. Of 55 companies targeted by IS to get involved with Give 5, 42 have joined in on the act. The 1990 ad campaign will increase in budget six times over 1989's.

The IS convention host city of Pittsburgh was a target of much ballyhoo of how public and private monies can be used together to help revitalize a rundown city. Pittsburgh was voted the country's "most livable city" by Rand McNally in 1988. The city government used its funds to clean its air and rivers and then returned public funds to develop arts programs, build parks and use landscape architecture to beautify the city's overall appearance.

Foundations like Carnegie and Mellon, and Pittsburgh universities — Pitt and Duquesne have combined with the nation's foremost hospital for transplant surgery, Presbyterian University Hospital, to form a strong combination of funded organizations with political and educational clout. David Bergholz, a former Pittsburgh planner, said, "This city has been cleaned up and has a good urban school system. Small grants have also launched some big projects," he said.

An ethics discussion during the convention showed that recent questions of integrity among some fund-raising groups has led to a public outcry against such practices. When polled, a large majority of the luncheon crowd said that public perception of such groups has dramatically decreased over the past five years. While charity can often lead to abuse, it is up to the individual groups to police themselves, according to an IS ethics panel.

The future in fund raising has many interesting aspects as far as governmental issues are concerned. According to Robert Boisture, general counsel for the YMCA, the major tax issues facing non-profits will be: a fundamental reassessment of non-profits on the requirements of tax exemption; a major focus of debate on how many services a non-profit has to provide; and that more local and state legislation will be involved in non-profit groups.

"Government is changing the way it looks at non-profits. We must work together," explained Boisture. He said that UBIT and other bills before Congress should be decided shortly.

Former Time Inc. CEO Andrew Heiskell was awarded the John W. Gardner Leadership Award by the IS during the annual meeting. Heiskell was given the award for his humanitarian work over the years.

Heiskell is a founder of the National Urban Coalition and a member of the board of directors of the New York Urban Coalition. He has also served as chairman of the President's Committee on the Arts and Humanities and was a Harvard College Fellow.

Heiskell was given a plaque with a bust of Gardner on it, and a \$10,000 check that he immediately returned to the IS.

In other news, Eugene C. Dorsey has been named chairperson of IS. Dorsey, CEO of the Gannett Foundation, was elected during the annual meeting and assembly. Since 1986, Dorsey has chaired the IS Give 5 Campaign. He replaces John H. Filer, a partner in the law firm of Tyler, Cooper & Alcorn (Hartford, CT). •

"The merger made us one—but Campbell brought us together."

James B. Field

The Twin Cities have long been considered innovators in health care delivery. So when eight St. Paul hospitals—four with different religious affiliations—announced they were merging to form one institution, it was seen as a model for health care institutions around the country.

The big question was, what happens to the fund raising?

"Figuring that out seemed like it would be tougher than the merger itself," says James B. Field, Vice President for the newly created HealthEast Foundation. "Four of the hospitals had active fund raising programs geared to very different constituencies. We were facing emotional as well as organizational issues."

So HealthEast turned to Campbell & Company. Institutional mergers were nothing new to Campbell, but HealthEast represented perhaps the biggest consolidation of its kind anywhere. Before making any recommendations on organization, budgeting, and staffing, Campbell & Company conducted in-depth interviews with key board members and staff.

"The Campbell & Company study not only helped us get our bearings, but also helped get the key players—administrators, board members, staff, and volunteers—involved and invested in the outcome," says Field.

"Now," he adds, "we are beginning to speak with one voice—and that's the first step toward building a strong, consolidated development program."

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Workshop Focuses On Campaigns Abroad And Practical Advice For Fund Raisers

The International Fund-Raising Workshop has come a long way. When it started in 1981 there were 34 attendees. At the most recent workshop, 450 participants from 20 different countries attended.

The site of the workshop, Leeuwenhorst Congress Center in Noordwijkerhout, Holland (near Amsterdam), has expanded steadily over the years, but it still was not able to handle all the attendees. The overflow was housed in nearby hotels, and a bus brought them back to the center for the meetings.

Odd Grann, secretary general, Norwegian Red Cross, spoke about the Norwegian House-To-House campaign, which raised $15 million in four hours last October. A seven-hour TV show on Oct. 16 started with a church service. The campaign, which has run for 10 years, is well organized, with a new administration each year. In that time it has become a social event that people enjoy participating in.

It involves 19 counties, 464 local communities and 90,000 "box collectors" who visit every home in Norway — 1.7 million households. Grann said the message must be easy to understand, concrete, realistic and honest. "We concentrate more on the reasons for the problem, rather than symptoms," said Grann.

The strategy is to visit all households in Norway. "The bank staff works that evening," said Grann. Competition among the 19 counties spurs the collections. As regards tactics, said Grann, "box collectors know what to do, when and how. All questions must be answered, and all mail must be answered within three days."

Six weeks prior to the TV show, there is a build-up period in the media — TV, periodicals, magazines, radio. The focus is on problems and recruitment of donors. "We look for full participation," said Grann. "We try not to be too sophisticated. After 10 years we have found we don't have to shout to be heard."

Biddy Baxter explained the remarkable success of the "Blue Peter" appeals in the United Kingdom. "The aim is not to raise the maximum amount of money," she said, "but to get the most children involved." The original idea of the appeal was to counteract the commercialism of Christmas, said Baxter.

"Blue Peter" is a TV program that appears twice a week on the BBC. It boasts an audience of 8 million viewers per program, attracting roughly one-half of the under-14-year-old segment. There has been one appeal a year for the past 27 years. Each appeal is different — ranging from sacks of toys for children to 1,000 tons of rags to 150,000 pounds to repair 200 irrigation pumps and a ferry across the Mekong Delta in Vietnam.

Each appeal is launched in November, with an effort to reach the goal by the new year. "It all requires organization," said Baxter, "with a collection depot, manager and staff." One appeal asked children to send T-shirts for children in Mozambique. Children responded with 2.5 million T-shirts, and the Royal Air Force provided transports to airlift the cargo to Mozambique.

Non-profits are working harder to keep donors as the cost to find new ones increases, says David Strickland-Eales, Chapter One Direct.

Strickland-Eales told the International Fund-Raising Workshop that the time to give up on lapsed donors is "when cost-effectiveness is no better than cold list prospecting."

In testing, he said, concentrate on those "things which are likely to have a material impact on the result and cost effectiveness. Test anything where the lessons you learn can be applied again in identical or similar circumstances." Don't test things of limited likely impact, one-time occurrences (like anniversaries), trivia, too much at the same time and more than one variable at a time.

Strickland-Eales stressed the importance of reminding donors. What do we get if we remind donors? He answered: "Extra gifts and response, 40 percent to 50 percent more money, improved profitability and cost effectiveness, a more active donor base and more committed donors."

On thanking donors, he listed the benefits: Saying thanks results in more satisfied donors who are better informed and involved. It also gives the non-profit the opportunity to communicate with donors on other issues, focus on active givers, ask again and upgrade donors. "If you don't thank them," warned Strickland-Eales, "someone else will, and it may be enough to persuade the donor to support another group rather than yours."

The golden rule, he said, is that there are no golden rules. "What works in one situation may not work in another," he said. "Use common sense and judgment."

Strickland-Eales offered fund raisers some practical advice: Do tell a positive story, create a real human need, tell real stories, use responsibly the tricks of the trade, make it easy for people to respond, tell them why you need their help, make the donor feel good, find an interesting way to tell your story, involve the donor in the project and say thank you afterwards.

He also offered some don'ts: Don't be clever for the sake of it, don't forget who you're talking to, don't take donors for granted, don't forget to say why you need their money, don't make them feel bad about giving, don't be afraid to ask for a gift, don't believe that cheapest is best, don't panic because a few people complain, don't be afraid to keep on asking and don't get caught by the research-base-of-one-syndrome. ●

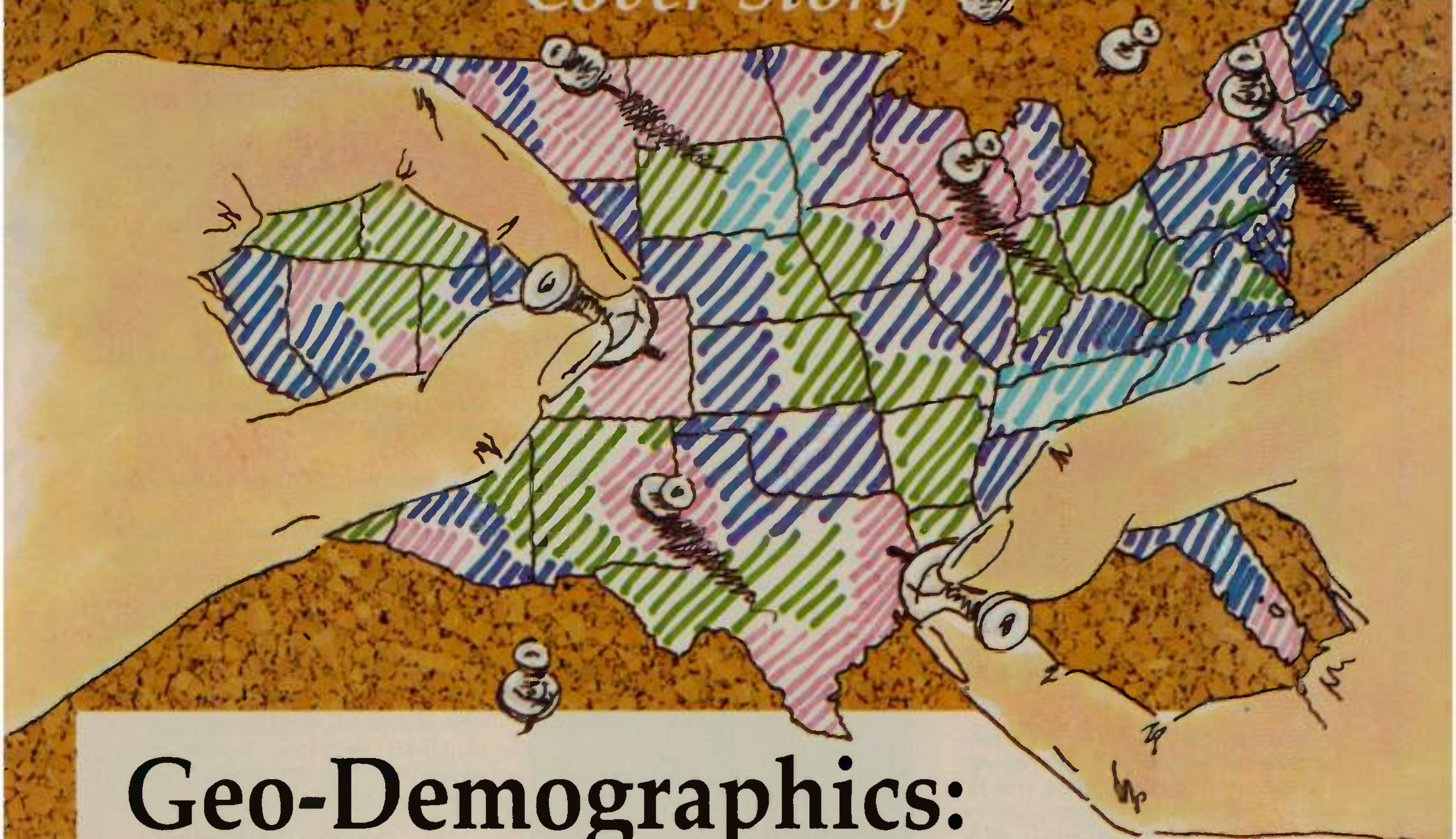
ECHO AWARDS:
Saving The Rain Forest
continued from page 20

white, except for a four-color picture of an acre of the Monteverde Nature Reserve centered in the middle of the page. The copy helps the consumer realize the importance of the forest in their own lives: "Half the crops which feed the world depend on these forests. One quarter of our prescription drugs have active ingredients found in tropical plants... ."

The copy noted the growth of the Reserve, saying that only 8,000 more acres remained to be protected and offered the reader an opportunity to receive a personalized honorary deed for every $25 donation. A reply coupon was included in the ad reassuring the respondent that the funds would be used exclusively for the preservation of the Reserve.

All creative development, production and media fees were donated to the World Wildlife Fund so there was no cost to the client, which would normally have run $14,190. The October issue of *Equinox* boasted a circulation of 181,000 and 1,900 people donated $102,000 — a 1.1 percent response with an average donation of $53.98 each.

Agency: Ogilvy & Mather Direct
Account director: Daryl Dickinson
Account executive: Philip Coppard
Copywriter: Fransi Weintstein
Art director: Warwick Hutton
Production: Tim Lynch
World Wildlife Fund vice president, development: David Love



Geo-Demographics: Targeting The Market

The Arthritis Foundation used this targeting and segmenting tool to direct its fund raising and its programs to the right audience.

By Daniel F. Hansler and Don L. Riggin

The Arthritis Foundation found itself in a "Baskin-Robbins society" with at least 31 flavors of donors, program consumers and volunteers. The Foundation could no longer "mass market" its respective offerings to a generic audience and decided to focus its efforts to a defined audience. The Foundation wanted to reach the right donor, at the right time, for the right amount, with the right message. To speak to each audience with one voice, the Foundation divided its donors/consumers into homogeneous groups or segments. The challenge was to accurately segment and focus on those groups of individuals with the highest potential to respond to the offerings.

Like other non-profit organizations, the Arthritis Foundation used to think in terms of demographics alone (i.e., age, income, sex, education level, etc.). But people with similar demographics do not exhibit the same lifestyles and behaviors. The Foundation found a few vendors with entrepreneurial spirit that have integrated data from the U.S. Census, computer technology and their own ingenuity into a process to segment Americans and create a way to target certain groups. That process is called *geo-demographics*.

A number of geo-demographic systems are available. Some of the better known ones are PRIZM by Claritas, ACORN by CACI and VISION by National Decision Systems. Because the Arthritis Foundation has used the National Decision Systems VISION system, we are using it for illustrative purposes in this article.

Before geo-demographics can be discussed, we need to review segmentation and targeting.

Segmentation is the process by which a non-profit organization partitions its donor base into homogeneous subsets that can be reached with various fund-raising and/or program offerings. Using market segmentation an organization identifies, quantifies and locates the target to which a fund-raising and/or program offering would appeal.

An effective market segment must meet the following three requirements:

1. You must have a system that can identify homogeneous segments.

2. The system must be able to quantify these segments. Some segments have a higher potential to participate in the offering than others, and you must be able to discern the differences.

3. Finally, the system must be able to locate these segments. It is of little value

Illustration by Joanne Johnson

Actress Victoria Principal, whose parents are afflicted with arthritis, is the foundation's national ambassador to government, handling legislation and advocacy work.

to identify a target audience for a fund-raising and/or program effort and not be able to locate members of that target. (For instance, "psychographic" segments are not always linked to geography.) In other words, you must know where your target audience lives.

The Arthritis Foundation had to be able to identify, quantify and locate homogeneous market segments. We found that geo-demographics provided the Foundation with the best method to locate those homogeneous donor/consumer market segments that have the highest potential for making contributions and/or participating in educational initiatives.

We considered the following in implementing a segmentation process:

- We intended to internalize the segmentation system and control our own destiny. The Foundation plans to be "marketing self-sufficient" when it comes to identifying the best donor/consumer groups and understanding the best ways to appeal to them.
- The Arthritis Foundation integrated this segmentation system across all functional areas of the organization. We have many audiences and most of the time they are different for fund raising and for the programs necessary to accomplish the organization's mission.
- The process must be simple. We did not want something so complex that our national and chapter staff could not use it.
- Another key requirement is stability in the segmentation system, which must work for the Foundation now and in the years to come. The Foundation cannot afford to be continually redefining the way it identifies and reaches its donors/consumers.
- Accountability is an important term to the Foundation. Any segmentation approach must produce "actionable" fund-raising and/or program efforts.
- Finally, the segmentation system must be cost-justified. Like all non-profits the Foundation has a limited budget. We demand the greatest return on our investment.

Before the Foundation could implement a geo-demographic system we had to understand the concept.

In order to understand geo-demographics, you need to understand geography. The United States is made up of 50 states and more than 300 metropolitan statistical areas (MSA). States and MSAs are broken down into counties. Counties are broken down into postal geography and census geography. There are approximately 42,000 ZIP codes with an average of 2,150 households per ZIP code. (This average can be misleading because the average ZIP code in a metropolitan area contains more than 6,000 households.) There are more than 200,000 carrier routes.

One of the contestants in the Washington, D.C. chapter Jingle Bell Run for Arthritis. The chapter was the first to stage a run in 1984.

Counties are also divided into census tracts and major civil divisions. There are approximately 69,000 of these units in the United States, each with an average population of 1,300 households. Finally, census tracts and minor civil divisions are divided into block groups. There are more than 250,000 of these units in the United States with an average of 361 households. This is the lowest level of census geography (covering the smallest area and containing the least population) for which detailed census data is released.

The foundation's aquatic exercise program is run by local chapters throughout the country in conjunction with YMCA.

These block groups are the neighborhoods that are the basis of a geo-demographic segmentation system such as National Decision Systems' VISION. Because the neighborhoods have a geographic reference (latitude and longitude), they can be easily identified and subsequently located. One can build a comprehensive composite view of a neighborhood by adding to this identifiable geographic location demographic and census data, buying habits and responses to surveys.

Building Database

Where you live largely reflects how you live. You are where you live! Because the geo-demographic neighborhoods contain only approximately 361 homes, these neighborhoods have a high degree of homogeneity. These neighborhoods are replicated all over the country. In other words, a certain type of upscale suburban neighborhood in Atlanta has the same demographics and exhibits similar behavior as an upscale suburban neighborhood near Chicago, Dallas or San Francisco.

Segmenting systems have been evolving as government census data presentations become more sophisticated and the power of computers has been harnessed. In the late 1960s and 1970s, segmentation started with ZIP selection, where the ZIP code itself was used as the unit for market segmentation. There were great limitations in this method because the ZIP codes constantly changed and were not homogeneous. The 1970 census offered the first use of census data for market segmentation and targeting. The government released the census data on tapes in summary form. However, census data itself proved not to be an effective segmentation system. Single variable selections such as age, or age by income, were not homogeneous and provided little information for action. This problem ushered in the first generation of geo-demographic targeting. These early systems conducted simple clustering to aggregate all the census neighborhood blocks into fixed numbers of classifications called clusters or market segments. In the late 1970s and early 1980s, large-scale surveys were used as a new ele-

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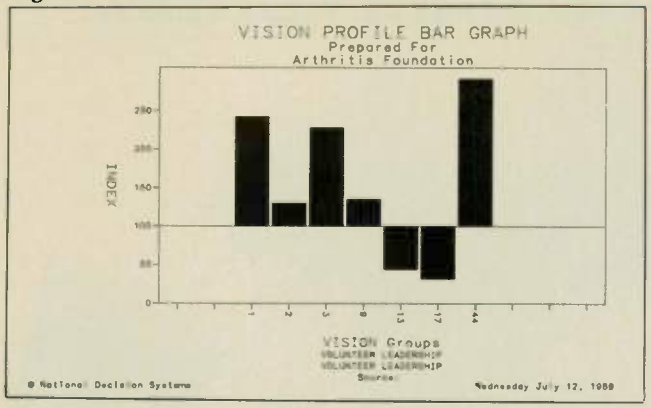
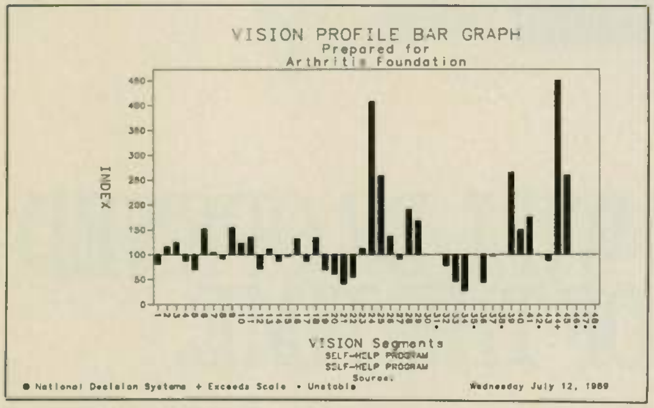
Figure 1



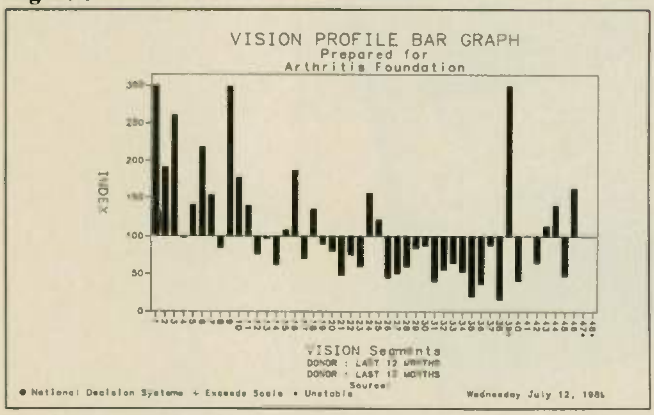
Segments above line 100 (like no. 44 — Prairie People) volunteer more often than 17 (Carports & Kids) and 13 (Little League & Barbecues).

Figure 2



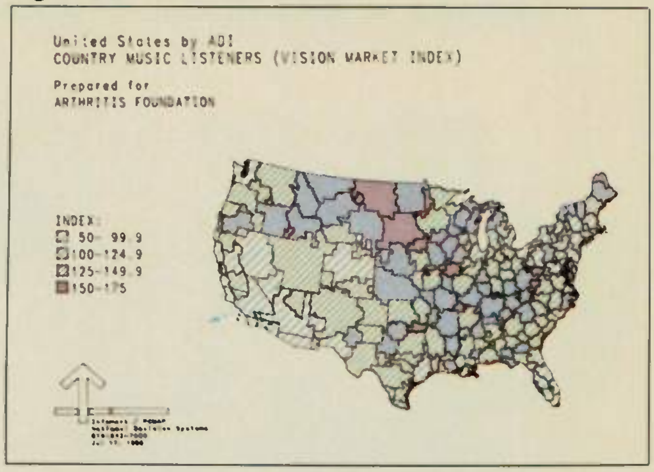
Segments above line 100 boast higher participation in self-help programs.

Figure 3



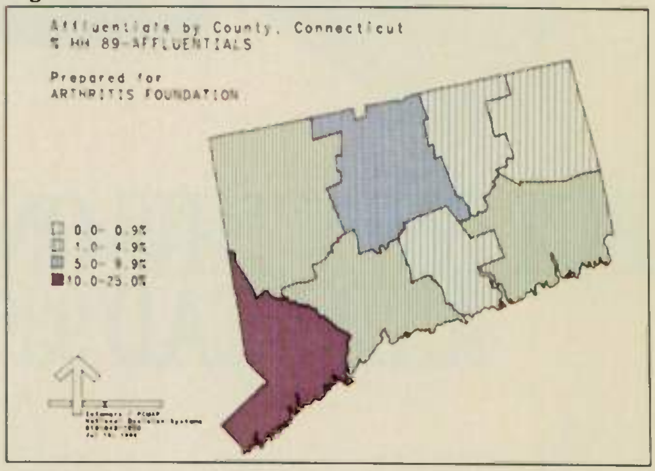
Arthritis Foundation has good penetration in some markets (above line 100) and poor responses in others (below 100). Data is used to design renewal strategies and list selection for acquisition program.

Figure 4



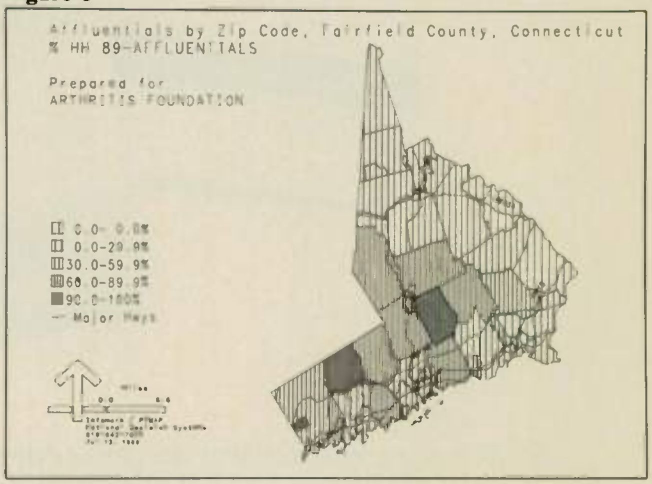
Red bars indicate where country western music is popular. Useful in planning telethon focus.

Figure 5



Red bars show the foundation's primary target market in a wealthy area of Connecticut.

Figure 6



Map shows foundation's primary fund-raising markets in Fairfield County, Connecticut.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ment in market segmentation. These proved to be poor segmentation systems because of their low coverage of the population, with their real contribution limited to direct-mail activities.

Also, in the 1980s, many single variable databases were built. Each of these provided only a few variables describing consumer behavior; therefore they proved less valuable to market segmentation than originally hoped. Then someone figured how to integrate these single variable databases into geo-demographic information from the census.

By the mid-1980s a whole new generation of geo-demographic clustering systems was developed, which combined census data, individual databases and consumer behavior. Segmentation systems were designed to predict household behavior rather than infer it.

As part of its strategic market planning process, the Arthritis Foundation needed to know demographic, psychographic and socioeconomic characteristics of its current donors, consumers and volunteers. Like so many other non-profit organizations, the Foundation had conducted studies of attitudes about the organization, and in this case attitudes about the disease. But, it did not know who was currently donating and taking advantage of its education programs. The Foundation gathered the home addresses of its mail responsive donors, contributors to its telethon, users of selected educational programs and volunteer leaders throughout the country. These category specific home addresses were geo-demographic coded and analyzed using the VISION classification.

Before we describe how we used VISION, we need to briefly describe this classification system.

VISION classifies every household in the United States into one of 48 market segments based on the demographic, socioeconomic and housing characteristics of its neighborhood block group. Each market segment is defined so that its consumption, purchasing and financial behavior is homogeneous within the market segment but different from the other segments. More than 100 variables are used in this computerized classification.

The first division of the 48 segments are into the type of area they represent. They are:

S — Suburban
U — Urban
T — Towns
R — Rural

These areas then are divided into general affluence groups. They are:

U — Very high socioeconomic status
H — High socioeconomic status
M — Middle socioeconomic status
L — Low socioeconomic status

By combining these areas and general affluence groupings, VISION is grouped into 12 categories, as listed below:

1. Suburban Wealthy
2. Urban Affluence
3. Suburban Affluence
4. Suburban Middle Class
5. Urban Middle Class
6. Town Middle Class
7. Rural Middle Class
8. Suburban Lower Income
9. Urban Lower Income
10. Town Lower Income
11. Rural Lower Income
12. Special Populations

To make these 48 VISION segments a little easier to distinguish, each has a descriptive label (nickname), e.g., "Suburban Gentry," "Young Urban Professionals," "Carports and Kids" and "Prairie People." For illustrative purposes two VISION segments are described in detail. (see below)

Target Marketing

The fundamental axiom of geo-demographics systems is that households in a neighborhood share a similar lifestyle and that these neighborhoods repeat themselves across the United States, allowing similar neighborhoods to be classified into a smaller number of market segments. Because similar neighborhoods repeat themselves across the United States, they can be aggregated into like groups to create an effective market segmentation system.

The VISION system has created an index to measure the penetration a particular fund-raising and/or program activity has in any of the 48 market segments. Figure 1 demonstrates how the indexing shows which of the VISION segments represent the volunteer leadership for the Arthritis Foundation (only a sample of the 48 segments are shown).

Consumption has been indexed with a base of 100 to represent average consumption. An index of 300 means three times the average consumption, and an index of 50 means half the average consumption. For volunteer leaders of the Arthritis Foundation, this graph shows that five of the seven VISION segments represented (the actual graph would show all 48 segments) are above the 100 average index, while two are below. This means that individuals living in neighborhoods labeled RL 44 — Prairie People — have a five times greater than average chance of being volunteers. SU 1 — Suburban Gentry — and SU 3 — Tuition and Braces — have a four times greater than average propensity to be volun-

SUBURBAN GENTRY

SU 1 Market Segment	**Wealthy, Older Suburbs, Professionals**
DEMOGRAPHICS	White families, teens, empty nesters
SOCIOECONOMIC	Highest income in United States, old and new money, highly educated professional class
HOUSING	Single family suburban housing, very high value
LOCATION	America's top metropolitan areas
LIFESTYLE	Big spenders and big savers, high on investment, expensive travel and leisure activities, theater, restaurants, liquor, magazines, books, large expensive cars, tuition, teen-age sports and home electronic equipment. Low on household durables and furniture, fast food and do-it-yourself items.

YOUNG URBAN PROFESSIONALS

UU 5 Market Segment	**Urban Professionals, Singles/Couples, High Income, Condos**
DEMOGRAPHIC	Young, white collar, singles and couples, college educated
SOCIOECONOMIC	High income, double income households
HOUSING	Condos, townhomes, high rent, high value
LOCATION	America's top cities
LIFESTYLES	Big spenders and low savers. High on electronic equipment, restaurants, theater, movies, clothing, outdoor recreation activities, magazines and books. Low on grocery and children's products, TV viewing, large cars. Big users of credit cards and direct mail.

teers for the Arthritis Foundation. SM 13 — Little League and Barbecues — and SM 17 — Carports and Kids — have a less than average propensity to be volunteers.

Once we knew where the current volunteers are located, we established programs to capitalize on the strengths in the upscale suburban market and to attract more volunteers from the middle suburban market.

Now let's look at some other aspects of the Arthritis Foundation that were studied. The Foundation has a successful self-help education/behavior change offering that helps individuals with arthritis live with the difficulties caused by their disease. This program has been promoted by the 70 chapters across the country with varying degrees of success. Staff and volunteers wanted to know who was taking advantage of the program. We gathered a sample of users (only home addresses so the name remained confidential).

Figure 2 is an analysis (all 48 segments are displayed) that shows that segments #24 (TM 24 Town and Country — older families, towns, middle income, white collar) and #44 (RL 44 Prairie People — older rural population, older housing, mixed occupations) have the highest propensity to participate in self-help programs. TM 25 — Hamlets and Hardhats, UL 39 — Sun City and RTL 45 — Tough Times — form a second group that has a high propensity to participate.

This chart and related analysis provided us with a clear indication of who was using the program. Education and community service initiatives are established as a result of a needs assessment and the incidence of a disease. This analysis permitted the Foundation to determine if the current users were the ones for whom the program was designed and where the potential users were.

Another example of the use of this type of market research was for direct-mail donors over the past 12 months. Figure 3 shows that the Foundation has excellent penetration in some segments and poor responses in other segments. This kind of information is invaluable in designing renewal strategies and list selection for the acquisition program.

The purpose of the analysis is to locate potential high propensity donors or program consumers to enhance the effectiveness of that activity. Once a non-profit has an analysis of a file (donors to a particular campaign or of a certain dollar amount or any other category) then a number of other analyses can be conducted.

Staff of a non-profit must have straightforward targeting tools to use in presentations to volunteer groups that in turn can make informed marketing decisions. This system does just that. Reports in a location format allow analysis of primary, secondary and tertiary market areas. Reports are also available in a comparison format that compares one market to another.

Maps are used to visually present the concentration of donors or program consumers in a geographic area. Current mapping capabilities allow the display of information at major market levels including ADIs (area of dominant influence), SMAs (statistical metropolitan areas) and SMSAs (statistical metropolitan service areas), as well as trade area levels within markets such as ZIP codes and census tracts. Modern mapping features such as accurate boundary files, major highways and road overlays, and the availability to plot exact locations, identify trade areas, zoom in on specific areas and provide labels, are key elements in presenting findings in donor analysis and target marketing applications.

Figure 4 is an example of a macro-level planning map displaying market potential of country western listeners from very high to very low for every ADI in the country. This is invaluable in planning for the Foundation's country western focus of the telethon.

Figure 5 is another example of a map's ability to display the Foundation's primary target market for fund raising at the county level for Connecticut.

Figure 6 moves to an even more local level of geography, evaluating ZIP codes within an SMSA. This shows the Foundation's primary fund-raising market for the Fairfield County, Connecticut SMSA. It demonstrates the ability to overlay major highways for reference, as well as indicating designated trade areas.

This targeting and segmenting was the basis of a five-year strategic marketing plan the Foundation's board of trustees adopted in November 1988. The Arthritis Foundation will continue to analyze its donor/consumer markets, refining the focus of existing offerings and planning for new ones. ●

Daniel F. Hansler is president of Fund Raising™ Company, Inc., a consulting firm that focuses on marketing for non-profit organizations, with offices in Los Angeles, New York and San Francisco. He has more than 20 years experience in the field and has assisted various national and local non-profit organizations with marketing problems.

Don L. Riggin serves as the executive vice president and COO for the Arthritis Foundation and is responsible for day-to-day operations. Since joining the Foundation in 1965, Riggin has held many leadership roles, including executive director of the Arkansas chapter, southwest area vice president and senior vice president of operations.

NEWSMAKERS

Non-Profits:

David M. Kahle has been named development director at Bethesda Lutheran Home (700 Hoffmann Dr., Watertown, WI 53094 — 414/261-3050). Also, *John B. Nickels* has been named associate development director.

Ritchey

Galella

Connie Graham has been appointed vice president of development for the Denver campus of the University of Colorado (1200 Lerimer St., Denver, CO 80204 — 303/556-2400).

Harriet Inselbuch has been named associate dean for development and public affairs at the New York Law School (57 Worth St., New York, NY 10013 — 212/431-2100).

Robert J. Giacovelli has been appointed director of external affairs for the Oregon Museum of Science & Industry (4015 SW Canyon Rd., Portland, OR 97221 — 503/222-2828).

Williams

Royal

Thomas Ritchey has been named vice president of hospital relations and development at Shadyside Hospital (5230 Centre Ave., Pittsburgh, PA 15232 — 412/622-2121).

Laurence H. Rubinstein has been appointed senior vice president for development at The Jewish Theological Seminary of America (3080 Broadway, New York, NY 10027-4649 — 212/678-8000).

Stephen Browning has been promoted to executive director of the Desert Palms Unit of The American Cancer Society (42-460 Bob Hope Dr., Rancho Mirage, CA 92270 — 619/568-2691).

Armando Galella has been appointed executive director of The Foundation of St. Joseph's Hospital and Medical Center (703 Main St., Paterson, NJ 07503 — 201/977-2000).

Ron A. Royal has been named president of the Sarasota Memorial Hospital Foundation (1700 S. Tamiami Trail, Sarasota, FL 34239-3555 — 813/953-1515). He replaces *Charles R. Estill*, who has retired.

Stephen W. Williams has been named executive director of the Meadowlands Hospital Foundation (Meadowlands Pkwy., Secaucus, NJ 07096-1580 — 201/392-3100).

Bernard Finkel has been appointed to the newly created position of national director of communications and donor relations at Little Brothers-Friends of the Elderly (1121 S. Clinton St., Chicago, IL 60607-4416 — 312/786-0501)

Joanne Hayes, president, American Association of Fund-Raising Counsel, Inc., has been elected to the board of Independent Sector (1828 L St., N.W., Washington, D.C. 20036 — 202/223-8100)

Suppliers:

Karen Pittenger, of Haynes and Pittenger Direct, has been elected president of the St. Vincent Stress Center Advisory Board (8401 Harcourt Rd., Indianapolis, IN 46280 — 317/875-4600).

Edward S. Schneiderman, of Schneiderman Associates, has been appointed coordinator for the activities of the Long Island Health Care Coalition, Inc. (c/o New York Institute of Technology, Old Westbury, NY 11568 — 516/686-7722).

Louis B. Quinto has been named a consultant at Calder P. Sinclair & Company (1750 Candler Bldg., 127 Peachtree St. N.E., Atlanta, GA 30303 — 404/688-4047). *Jennifer L. Davis* has joined the firm as an associate consultant.

Susan Boyette has been named assistant to the president and coordinator of research and records for Alexander O'Neill Haas & Martin, Inc. (133 Carnegie Way, Ste. 1000, Atlanta GA 30303 — 404/523-1122).

John F. Coy has been named senior vice president at The Jefferson Group (1823 Jefferson Place, N.W., Washington, D.C. 20036 — 202/833-3535).

William R. Parker, CPA, has been promoted to audit senior at Dollinger, Smith & Co. (1777 S. Harrison, Ste. 310, Denver, CO 80210 — 303/753-6507). Also, *Jill E. Browning*, CPA, has been promoted to tax senior.

Mary Woolley has been elected president of the Association of Independent Research Institutes. Woolley is executive director of the Medical Research Institute of San Francisco (2200 Webster St., San Francisco, CA 94115-1821 — 415/561-1701).

Mark B. Faris has been appointed president of the United Check Clearing Corporation's new affiliate, American Lockbox Services, Inc. (14276 23rd Ave. N., Minneapolis, MN 55441 — 612/559-0719).

Marilyn Tucker Quayle, wife of Vice President Dan Quayle, has been named an honorary member of the board of the Deafness Research Foundation (9 E. 38th St., New York, NY 10016 — 212/684-6556).

The Carol Enters List Company, Inc. has announced the relocation of its headquarters to 9663C Main St., Fairfax, VA 22032 — 703/425-0052. The company's New York office will remain open until Dec. 31., 1989.

Awards:

Father Bruce Ritter, founder and director of Covenant House, has been named the 1989 recipient of the Father Flanagan Award for Service to Youth given by Boys Town (Boys Town, NE 68010 — 402/498-1300).

Clyde Watkins has received the 1989 Benjamin Franklin Award from the Chicago chapter of NSFRE (414 Plaza Dr., Ste. 209, Westmont, IL 60559 — 312/655-0134). Watkins is vice president for external affairs at Illinois Institute of Technology.

Paul B. LeFebvre, president and CEO of LeFebvre Intergraphics, has been given a special award by the Juvenile Diabetes Foundation (JDF, 432 Park Ave. S., New York, NY 10016 — 212/889-7575). According to a JDF spokesperson, the award recognizes LeFebvre's efforts and support of the foundation.

Dr. Armand Hammer has been named the recipient of the first Distinguished Philanthropist Award given by the American College of Surgeons (55 E. Erie St., Chicago, IL 60611-2797 — 312/664-4050). ●

Death:

Henry Bowen Burnett Jr., a free lance copywriter and a partner in Forum Communications, died recently in Santa Barbara, California. He was 59. Burnett created mailing packages that raised many millions of dollars for such non-profit environmental and human rights organizations as The Cousteau Society, Friends of the Earth, The Nature Conservancy, Amnesty International and the Simon Wiesenthal Center.

by Willard Bailey

A visit with the next chairman of the American Hospital Association

David Reed has a pleasant, almost cherubic mien which belies the responsibility he shoulders. As president of The Samaritan Foundation, he leads the largest health-care system in Arizona — a state with one of the most competitive, treacherous health-care environments in America.

In January he will assume the chairmanship of the American Hospital Association (AHA), an embattled group of 5,044 hospitals trying to survive what Reed calls "difficult times."

I met with him in his comfortably, but not ostentatiously, appointed office at Samaritan headquarters in Phoenix. The purpose of our interview was to talk about some of the dynamics in today's health-care environment which are muddying or threatening to muddy the waters for fund raising.

First I asked him how he views the role of philanthropy in hospitals between now and the turn of the century.

"I think the role of philanthropy is undoubtedly going to grow in importance during these difficult times for hospitals," he responded. "It's obvious hospitals are experiencing considerable financial distress as a result of competition, Medicare underfunding, Medicaid programs, a downturn in volume, etc."

The development of alternative sources of revenue is critical to the survival of not-for-profit hospitals, he explained. And one of those alternative sources — one that needs to be aggressively pursued — is philanthropy. "In my opinion," he declared, "philanthropy is going to be even more important in the future than it has been in the past."

Recently, Brakeley John Price Jones, Inc., has studied and produced comprehensive reports on a slew of factors which collectively profiled (in 1987) the development operations of institutions of higher education and (in 1988) hospitals. Comparative figures taken from the most recent report ("The Brakeley Hospital/Medical Center Development Office Compensation and Capital Campaign Report," 1988 edition) show that development programs in the 248 colleges and universities surveyed raised 10.2 percent of their institutions' operating budgets.

By contrast, the development programs of the 268 hospitals surveyed raised 3 percent. And these, mind you, were *successful* programs, not the multitude which stagger all over the place and spend more than they raise.

Based on those numbers, I asked Reed, "Why bother having a development program at all?"

"It often makes the difference between having the cake and having the cake with icing," he said. "While the amount of money may not represent a significant percentage of operating requirements, it often makes a difference in the caliber of equipment, the quality of the facilities or the dimensions of a particular program. A little bit means a lot in tough times."

Reed acknowledged that hospitals have increased the level of their expenditures so rapidly that philanthropy has not been able to keep pace. But he doesn't think that gulf makes philanthropic gifts less important.

"I've been in many situations where the ability to draw on an unanticipated source of revenue has made a difference in the quality or character of an institution," he said.

I asked him about the increasingly strident demands upon not-for-profit hospitals to provide more charity care in order to, in effect, live up to what their mission was when they were granted 501(c)(3) status. And I asked him whether philanthropy can play a significant role in meeting those demands for charity care.

He thought a while before answering. Then he said, "*How significant* is difficult to determine, I believe."

There is no question, he admits, that not-for-profit institutions in general, and hospitals in particular, are under considerable pressure to demonstrate their worthiness as 501(c)(3) corporations. And in the case of hospitals, community service and charity care are the bulk of the justification for that status.

What, besides charity care, does he define as community service?

"Research, medical education and allied education programs," he said. "Things like participation in nursing education programs. Certainly with the severe nursing shortage we're facing, an institution which does its part in providing clinical experience and training programs for nurses is performing a community service."

Zeroing in on the charity care issue, though, Reed is dubious that philanthropy can have much of an impact. "When people think of hospitals and the issue of charity care," he suggested, "they often translate provision of free care into an expectation of responsibility of government. They tend not to want to support programs which are underfunded by government. I think they'd prefer to see their charitable gifts channeled in other directions."

Speaking of justifying 501(c)(3) status, I asked him how confident he is that hospitals will still have their not-for-profit status by the turn of the century.

"I think we will be severely tested to justify our continued status," he replied. He pointed to the increasing number of state legislators that are "taking a shot" at the tax status of not-for-profits. He predicted that, "We're likely to be facing some sort of means test in the future to justify that status.

"I have no particular problem in meeting reasonable criteria to justify that designation," he added, "because there is a wide variance in institutions' response to preserve that designation. And institutions that do not have medical education programs, for the most part do not have research programs, provide limited free care, do little for the community in terms of public service, may not deserve 501(c)(3) status."

I read aloud to AHA chairman-elect David Reed three quotes which have recently ap-

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Willard Bailey is president of Willard Bailey & Associates, Fundraising & Marketing Counsel, Phoenix, Arizona. Prior to starting his consulting business in 1983, he was a hospital development director for more than 20 years. He is a Fellow of the National Association for Hospital Development. Bailey is also a member of the National Society of Fund Raising Executives and a member of the board of the Greater Arizona chapter. He holds a master's degree in psychology from the University of Cincinnati and a master's degree in journalism from Ohio State University. Bailey can be reached at 602/942-1322.

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peared in the "Health-Care Fund Raising" column of *Fund Raising Management*. Here they are:

- "The more not-for-profit hospitals take on for-profit activities, the more they look like for-profits to their constituencies." — Steve Morris, former president of AHA
- "More and more the perception of hospitals — all hospitals — is that they are big business. They are moving out of the noble, saving-lives, caring-for-the-poor mode." — Barbara Bailey, former *FRM* columnist
- "I think hospitals *are* perceived as big business. I think the public's perception of hospitals is that they're being run by businessmen, and the issue of quality comes second." — Dr. Joseph Romano, senior vice president and group director, Health Care Division, Hill & Knowlton

Then I asked him what impact he thought those kinds of perceptions have on the ability of not-for-profit hospitals to elicit philanthropic gifts.

"I would call those kinds of perceptions an Achilles' heel to fund raising," he said. "But I think there is a lack of recognition that the reasons hospitals tend to become more concerned with their financial stability relates to the ratcheting down of reimbursement for programs like Medicare and other programs which require an efficient manager to reduce the outflow of uncompensated care. You can't continue to provide millions of dollars of free care at a time when the government and other third-party payers are beginning to ratchet down what they are paying for the cost of the care they support."

He cited an analogy: "If you're a car dealer, you can't afford to give away every fifth car — without raising the price on the rest of the cars. But if someone is paying a fixed figure for those cars, and they're not paying for the fifth car you're required to give away free, you've got a problem. You can't keep giving away that fifth car; you'll go bankrupt."

That's exactly the bind hospitals find themselves in here in the late 1980s, Reed said. And in their quest to continue to meet community responsibilities, he explained, not-for-profit hospitals have developed profit-making subsidiaries. "But they didn't go into those businesses to make money for stockholders," he said. "They did so to develop revenues to offset shortages on the not-for-profit side, to provide uncompensated care."

Reed wagged his head, sadly. "But we haven't told that story very well," he said, "and that's why we're being hurt by perception."

I reminded him that even intelligent people don't know what the word *profit*

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means in not-for-profit hospitals.

Reed nodded. "We are using terms that poorly describe our basic role," he said. "I tell our people [at Samaritan], 'We don't generate profits; we generate *surpluses*!' "

He paused. "I think the industry needs to revisit its posture, its terminology and its demeanor," he said. "If we are truly going to be 501(c)(3) corporations, we have to act like them. But that is in contrast with many expectations which are placed on us by outside businesspeople who say, 'Your problem in the hospital field is you don't run that place like a business.'

"So we need to run it like a business but make certain the public understands it's a not-for-profit business."

I asked him about the cascade of advertising by not-for-profit hospitals across the decade of the 1980s, and what that's doing to the climate for fund raising.

"In the quest to gain financial stability," he replied, "we are employing all the tricks of the trade. Marketing! Whoever heard of directors or vice presidents of marketing in non-profit hospitals 10 years ago? Now market share spells financial salvation. And how do you get market share and 'run that place like a business?' The way you get market share is you get out there and you advertise and you develop a concerted effort to attract market share. And advertising is the fuel that powers marketing programs."

"You just used an interesting word," I told him, "*fuel*. Fuels tend to pollute the environment. Don't you think advertising is polluting the environment for fund raising because of the perception it generates of hospitals being just like IBM or Procter & Gamble or General Motors?"

Reed frowned. "During financial distress it's hard to leave any stone unturned. But yes, it diminishes the motivation to give. The perception is you don't give charitable contributions to IBM. You don't give charitable contributions to other businesses. And it's a perception problem our industry is going to have to address seriously."

Which brought us around to Reed's impending term as chairman of the American Hospital Association. Did he have any sense that possibly an important agenda item for the AHA might be some sort of national program to better explain to the public at large what he had just explained to me?

"Yes," he said. "The board of the American Hospital Association is very sensitive to the public perception of hospitals. We are very conscious of the fact that across recent years we have developed the image of a big business, and that our bottom lines are profits.

"I think justification of our 501(c)(3) status is a critical issue on the board's agenda. But not only do we need to justify our 501(c)(3) status, we also need to create an appropriate image to encourage philanthropy. They go together." ●

by Richard Ensman

Local prospecting and direct-mail myths

The great majority of community-based health and human service agencies, schools and other not-for-profits use direct mail to contact donors and prospects during the annual campaign. A significant — and growing — number of local organizations are beginning to use direct mail as a prospecting tool, much as their national counterparts have been doing for years. The only difference is that local organizations must usually limit their prospects to the communities they serve.

Development staff of these local organizations typically study direct-mail techniques in depth before embarking on their ambitious prospect programs. They learn all the rules. So they know, for instance, that long letters usually "outpull" short letters. Live stamps on envelopes may pull a higher response rate than a bulk mail indicia. Teaser copy may get prospects to open their envelopes and read the appeal. Scientific testing of any appeal is crucial. A 1 percent response rate is great. And so on and so on.

But there's a problem here. Direct-mail "rules" don't always work on a local level. And even when the rules work, the prospecting effort often fails for economic reasons.

I learned this a long time ago. Back in the 1970s, I prepared a prospect mailing to 5,000 upstate New York residents who subscribed to a national periodical. I think the package was a good one — two-color art, a compelling case, good writing, warm photos, easy-to-use response device. The overall effect was simple and powerful. I think the audience was properly targeted, and the rented mailing list properly selected.

The result: 80 people responded with an average gift of $11 — a seemingly respectable response rate of 1.6 percent. Revenue totaled $880, which covered the appeal's $825 cost (don't forget, these are mid-1970s costs).

Needless to say, I was delighted. I had read stories about organizations losing considerable sums of money on their prospecting efforts, and yet I had generated a tiny profit on my first attempt!

Now I was off and running. I hypothesized that a different list would produce an even better result the second time around. So I went back to the drawing board and found a new list — a list of authenticated, real-live donors to other causes. Now I had a control list and a test list to work with — and almost 10,000 prospects for the next mailing.

The control list pulled 78 responses with an average gift of approximately $10.50 — similar to the first mailing I had conducted. Revenue totaled $819, costs totaled $760 and my "profit" was $59. The test list pulled only 47 responses with an average gift of approximately $12. Revenue on the test list totaled $564, and costs totaled about $760, for a "loss" of $196.

But keep testing, the rules said. Eventually, you'll discover the lists that will do a dynamite job. Or change the package, the rules said. You may hit on copy or graphics that will "up" the response rate considerably. But above all, keep prospecting, the rules said. Eventually you'll build up your house list and your long-term donor stream.

It was at that point that I began questioning the rules and analyzing the long-term risks of such a program. Here's what I surmised:

* *Direct-mail prospecting on the local level is risky business.* I could test different mailing lists to my heart's content, but at best, I could only hope to raise a few dollars on any given appeal. More probably, I'd incur a number of losses before I found those "perfect" lists. But how many $196 (and remember, we're talking about mid-1970s dollars here) losses could I sustain?

* *The "perfect" list will always be too small.* The first and second time out I used the local mailing list of a national periodical. About 12,000 names were on the list; I ended up using 10,000 names in just two mailings. Most segmented mailing lists I studied carried a relatively small number of upstate New York names — 3,000 on one list, 14,000 on another, 8,000 on still another — the *only* prospect names I could use for a local appeal. Even if I were willing to go through trial and error to find a list that was "perfect" for my appeal, I'd use it up — fast. And then I'd be back to more trial and error and, at best, lists that didn't work as well.

* *Testing different packages increases the risk.* If I were to attempt to build my response rate by testing the effects of different *packages*, I'd have to bear the costs of developing, writing, designing and printing each different package I wanted to test. Those costs were considerable in the 1970s; they're even greater today.

* *Successful testing on the local level produces results that are marginal at best.* Back in the 1970s, I'd have been thrilled if a test package pushed my initial 1.6 percent response rate up to 2 percent or so. By national standards, such a jump would have been a spectacular success — a success resulting in thousands, or even tens of thousands of additional dollars in net revenue *if it were replicated on the national level.* Given a local mailing of 5,000, however, a jump of .4 percent would have only yielded an additional $220. The extra $220 wouldn't have covered the additional cost of creating the test package that produced those very results.

* *Local direct-mail prospecting may not produce cost-effective donor streams.* Classical fund-raising theory holds that even if initial direct-mail prospecting loses money, the effort will add a sufficient number of loyal, steady donors to the house file to compensate for the acquisition losses many times over. But consider the 80 donors I acquired in my first direct-mail effort. With a 75 percent annual retention rate, a steady $11 average gift and a house file cost of $5 (covering annual campaign costs, computer entry and donor newsletters), watch what would happen to this group over five years:

	2nd Year	3rd Year	4th Year	5th Year	6th Year
Number of donors	60	45	33	25	19
Revenue @ $11/donor	$880	$660	$495	$363	$275
House file cost @ $4/donor	240	180	132	100	76
Net revenue	640	480	363	263	199

(continued on page 54)

Richard Ensman Jr. is a development professional in Rochester, New York.

Ensman

For these five years, the donor stream generated from this prospect mailing would have produced $1,945 in net revenue. Sure, one of those acquired donors — just one — could make a $1 million gift. But come on; these folks are names on a mailing list. What's the likelihood that a large gift, a really large gift, would come out of this donor stream? Yes, cultivation might increase the interest of these individuals in the cause over the years. But cultivation could be used just as effectively — if not more so — to increase the interest of people on the house file or prospects identified in more personal ways.

My purpose here is not to downplay the value and strength of direct mail as a fund-raising technique, only to analyze its limits on the local level.

Direct-mail prospecting does work. It works for national, regional and state organizations with huge potential constituencies. It occasionally works for local organizations which enjoy universal appeal in their communities. It certainly works with almost any organization's house file.

National organizations can make direct mail work for a number of reasons. They can take advantage of economies of scale in the large appeals they conduct. They have access to data processing technology that local organizations only dream about. They may have access to investment capital that allows them to ride out unsuccessful tests and acquisition losses. Because of the volume of their direct-mail efforts, many national organizations can turn a difference of one-tenth or two-tenths of a percent in a mail test into tens of thousands of additional dollars — and build a productive, cost-effective relationship with mail donors over a long period of time.

Since the 1970s, I've successfully used direct mail for house appeals, and I've even used it successfully for a few specialized local prospect appeals.

But I couldn't be convinced that large-scale direct-mail prospecting was right for me in the 1970s — and I still can't. How many new donors, after all, can even the most successful local direct-mail prospecting effort identify today? 50? 100? 200? 400? How many, really? Give me a goal and I'll bet I can find a way to reach that number of prospects — without licking a single stamp. ●

by William Lampton

Networking for personal and professional growth

The call came just this morning. Joe told me, "I'll be visiting your hospital on Friday for a Risk Management meeting." He asked: "After the group has lunch, can I meet with you for a while to talk about our hospital's plans for a foundation?"

"Sure," I replied. "Friday happens to be a good day. I'll look forward to seeing you."

Joe was networking — making contact with another development professional. Actually, I engaged in networking, too, when I agreed for him to meet with me.

Development officers network for several reasons.

For one thing, we enjoy the friendships that networking fosters. Even though we might work at differing types of institutions — colleges, United Ways, community foundations — we begin with the common bond of promoting philanthropy. Besides having this shared responsibility, we find that development people are customarily extroverted personalities we tend to like being around. Even if there were no professional advantages, networking would be worthwhile because of the personal rewards.

Professionally, networking provides repeated opportunities for improving our skills. We see and hear how our colleagues do things well. We receive their advice and use some of it. We benefit from their approaches to problem solving. Likewise (especially later in our careers) we can share strategies they can learn from.

And all of us are aware that networking can be useful for professional advancement. Listing one or two peers on your résumé indicates to a prospective employer that you consider yourself in the mainstream of your profession. Executive recruiting firms even request the names of those you value as mentors or colleagues.

A few years ago a person I had networked with served as a consultant for an educational institution searching for a development officer. He reviewed résumés of applicants and recommended those he thought merited additional contact. When initial interviews were completed, the president asked him to assist in ranking the applicants. My acquaintance told me a few months later, "I didn't really make the job decision myself, but I certainly could have kept any of the finalists from getting the position if I had wanted to."

In a majority of searches, the top five candidates might look fairly similar on paper. It's even likely they'll have strikingly similar poise during interviews. So what might make one emerge above the group is documentable praise from a professional associate.

Well, since networking is so valuable, how do we do it?

The first step is basic. We affiliate with one or more professional organizations. Not only do we join, we attend meetings. We become visible — repeatedly.

One way to stand out from others who attend is to accept a committee assignment or two. In some organizations the first task assigned might be well below the glamorous level: counting attendance in a seminar or handing out programs. However, you can meet people that way. Also, if you do that job well and cheerfully, your next invitation could be more prestigious.

Certainly you can take initiative yourself by submitting a paper or journal article when you read about competition to appear on a program or get published. I advise against sitting around waiting for an invitation in your mail basket. Too many others will be sending in materials for consideration, nullifying the need for the committee to solicit drafts.

When you're fortunate enough to get published, you'll generate additional contacts by offering sample materials to any reader who requests them: a brochure, program outline or similar items.

When you meet conference participants, you'll be very much in order to swap cards and agree to get on each other's mailing list. Do that a few times, and you'll have a steady flow of annual reports, solicitation letters, newsletters and campaign booklets from organizations like yours. In the process, you'll pick up facts and program ideas. Meanwhile, your colleagues will become familiar with your accomplishments.

The next step is to visit other development offices. It's one thing to hear someone describe their shop when you're both a thousand miles away, and it's quite another to visit there.

On site, you sense the nuances of a situation that separate it from others that supposedly resemble it. You see how the director relates with his or her staff, and you have an opportunity to compare that management style with yours. You can understand how jobs interact, a dynamic that charts can't bring to life as clearly. You see why particular fund-raising approaches might work there, but not on your turf.

Courtesy will prompt you to reciprocate with an invitation to your office, where your staff can gain new vistas by talking with a seasoned professional other than you. Likewise, your guest will enjoy the same advantages you had in his or her office.

Now that you have established a mutual advisory partnership, you both will feel free to dial each other occasionally for advice. As long as you keep your calls brief and spaced apart a reasonable period, you're likely to get helpful counsel from questions such as these:

"How did you get your Parents Fund started?"

"What are your guidelines for soliciting former patients?"

"Do you rotate terms for your trustees — and if so, how do you arrange that?"

"What kind of workshop do you think would be best for a new board?"

Especially during my earlier years in development, I relied on calls of that sort almost weekly. Though the frequency has dropped, I still use the method very profitably.

Because catching busy folks by phone isn't easy, and because sometimes I want more structured information than I'd get by phone, I also network by sending out surveys. To do that, I preface the survey with a short cover letter, and I keep the survey brief. Naturally, I provide a stamped, addressed envelope for convenient return.

Other development officers, I'm sure, succeed with a blanket mailing to a wide audience, but for myself, I have confined surveys to development people I know or who have been recommended by my closer

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Dr. William Lampton's development career has included college programs in Mississippi, Kansas, Kentucky, South Carolina and Georgia. In January 1988 he moved into health-care development as executive director of The Medical Center Foundation at Northeast Georgia Medical Center in Gainesville, Georgia.

FYI...
Book Focuses On American Voluntarism

Voluntarism in America is at an all-time high, according to the book, *Volunteers In Action*, by Brian O'Connell, president of Independent Sector, and Ann Brown O'Connell, his wife. They note that the American people are switching from a "me" generation to being part of a "we" generation. The book was published by the Foundation Center, a national organization specializing in publications on foundation and corporate giving.

The book focuses on the generosity of the American people in general, and how many people volunteer their time and efforts to different organizations. According to the authors, there are 80 million American volunteers. "A greater proportion of our population is involved in volunteering and giving than was so at any time in our history," they said.

Different individual stories about voluntarism in America are captured in the book that highlights people helping people. Famous charitable organizations like the Special Olympics are featured and little-known groups like "Christmas in April," which helps people with home repairs, are also capsulized.

The book can be ordered by sending $19.95 for paperback or $24.95 for hardcover copies to the Foundation Center, 79 5th Ave., New York, NY 10003, or call 800/424-9836.

Lampton

associates. My reasoning is that most of us receive more surveys than we want to complete, so we need special incentive — such as friendship — to encourage us to fill one out. With this guideline, I've enjoyed a very high rate of response.

One question that might have crossed your mind: At what point do you start asking so much of a colleague that you have exceeded reasonable demands on time and expertise, so that you should be prepared to pay a consulting fee for time and services rendered? My answer is simple. The person you're asking for help will usually let you know when you're crossing that boundary.

To illustrate, a mentor might make one visit "gratis" to your office to get better acquainted and swap ideas. But if you ask her to return for a day to analyze your annual giving outline and make suggestions after conferences with staff members, I think you should ask the professional's fee ahead of her visit — if she hasn't introduced the subject herself, which she could do appropriately.

My closing comment could be labeled frivolous, but I'm serious when I say that networking includes taking part in social functions, even athletic outings. Every conference offers such occasions, and in addition you can sponsor informal get-togethers with minimal expense, even dutch-treat gatherings. Those who dine alone at meetings miss some excellent opportunities for talking with others in informal settings.

In fact, because social skills are such an important part of a development officer's job, receptions give you another opportunity to demonstrate your "crowd comfort."

I assure you that I'm not calling for just a "good old boy" syndrome. I'm only advising that interaction with fund raisers outside of an institutional environment lets you get to know your peers in the absence of office protocol. The rapport established this way makes it much easier for you to pick up the phone a few weeks later and ask for feedback about an idea.

Networking, I repeat, is an irreplaceable method for growth and advancement in our field. Fortunately, networking is really enjoyable for almost everyone I know in the profession. Certainly more fun than preparing the annual budget, don't you think? •

Letters
continued from page 6

Once again, thank you for such a timely piece! The more people can become educated about the organizational impact and responsibilities of computer technology, the fewer problems we will all face.

Sincerely,
Francis H. Kittredge
Systems Manager/
Membership Manager
Arizona Theatre Company
17 E. Thomas Rd.
Ste. 15
Phoenix, AZ 85012

ON THE ARTS

by Alvin H. Reiss

Local arts agencies throughout country help spur funding for cultural programs

Although they are not widely recognized for their role in boosting arts funding, local arts agencies have been a vital force in promoting culture's cause in cities and towns throughout the country. As a resource for all the arts in their respective communities they have been instrumental in helping to spur funding from local government, business, foundations and individuals.

Alvin H. "Skip" Reiss, a noted arts writer, lecturer and journalist, is the editor of Arts Management *and author of the new book* Cash In! Funding and Promoting The Arts. *He also directs the Professional Arts Management Institute and is administrative director of the Arts Management Certificate program at Marymount Manhattan College in New York City.*

Not all local arts agencies or community arts councils, as many of them are known, have similar structures. Some are private non-profit agencies, some are public municipal agencies, some are private agencies with official designation by their municipalities and still others are affiliated with park and recreation departments. Some function as united arts funds, holding annual drives for all the arts in the community while some, especially those that are official branches of the local government, make grants from public funds to arts groups in their communities. All of them, however, regardless of their official designation, are deeply involved in the job of advocacy and finding ways to increase funding for the arts.

The arts council movement dates back to the late 1940s, a postwar period when new cultural organizations were beginning to sprout in cities far from the beaten cultural path. Arts leaders in such communities as Winston-Salem, North Carolina, and Quincy, Illinois, where America's first community arts councils were established, saw the need for agencies which, while not necessarily producing or presenting the arts themselves, would help both emerging and established cultural groups to find funds for their activities, administer their programs professionally and win new audiences. During a period when arts attendance was well below what it is today and when state and federal governments were not funding the arts at all, local arts agencies were frequently one of the most visible signs of an arts presence in a community and a cheerleader for local arts development.

The growth of local arts agencies has been nothing short of phenomenal in the past quarter of a century. By 1962 some 50 local arts agencies were in existence. By 1984 that number had increased to about 2,000 and today it is estimated that there are nearly 3,000 local arts agencies in rural, urban and suburban settings. The growth throughout the country has been so impressive, in fact, that there are now statewide assemblies of local arts agencies in 27 states.

A recent survey of local arts agencies by the national service organization, Arts for America, the National Assembly of Local Arts Agencies, showed the range of services provided by these councils including such activities as providing information services, developing long-range plans, initiating incentive programs, such as art in public places, and being involved in a range of funding and advocacy activities.

A look at the recent activities of two local arts agencies, one an official city agency, and the other a private agency with ties to the local government, demonstrate the key role these organizations can play in boosting local support of the arts. Although each operates in a different way, their positive impact on local funding is equally significant.

Denver's Commission on Cultural Affairs is an official city agency with specific responsibilities in such areas as managing the city's growing public art program and its funding program for local arts agencies, supporting arts in education programs and providing technical assistance to a range of arts groups. Perhaps its greatest achievement in the last year, however, has been its key role in shaping pioneer legislation for the new Cultural Facilities District, which became a reality last January. Local voters, in an unprecedented action, approved a one-tenth of 1 percent increase in the local sales tax for the six-county metropolitan Denver area to fund the new district. As a result, some $13 million a year is being raised through the tax to help support a wide range of local area cultural organizations.

As initially conceived, the plan would have benefited a small number of area groups. The Commission, however, was able to help broaden the scope of the legislation. By making it applicable to both large and small arts groups the Commission was able to help develop a first-time, area-wide, cooperative funding vehicle. The result is that the new revenue stream will benefit not the handful of arts groups originally conceived as beneficiaries, but some 65 in Denver and well over 100 in the surrounding five-county area. The initial dispersal of funds, $5.3 million in sales tax dollars on Sept. 18, has provided the recipients with a major boost. The Central City Opera, for example, which received nearly $75,000, will use the funds for a new production and to help retire a long-standing debt.

The Commission will be assuming a major new responsibility with its public art program which, in an 18-month period, has already resulted in commissioning an estimated $800,000 in art works. With plans approved for a new Denver airport, the Commission will be involved in dispersing $5.2 million for public art projects at the airport over the next 4½ years.

The Arts Council of New Orleans, a private arts agency, has waged an incredibly effective battle over the past year, to increase support for the arts. With the local economy on a decided downswing brought about in part because of the oil glut, and fiscal restraints imposed on both the state and the local government, the council decided to focus on expanding private rather than public funding.

The Council focused a good deal of its efforts on The Business Council, a group concerned with finding ways to achieve fiscal reform in the city and state and getting the local economy back on its feet. Through its efforts, the arts council was able to make the business group, whose members included the CEOs of 50 leading New Orleans corporations, aware of the need to include the stabilization of finances of key local arts groups in its overall fiscal concerns.

"We convinced them that New Orleans is its culture," said Marion McCollam, executive director of the arts council, "and that it was vital to the overall well-being of the community to support the arts in the worst of times." In pragmatic terms the arts council was able to help convince the business group of the need for a local corporate arts fund and provide it with information on how one could be established. Once the Business Council had agreed on the fund's development, the arts council then encouraged its members to expand their thinking beyond the three major local arts organizations initially conceived as beneficiaries and focus on all the arts.

The outcome of these efforts has been a major lift for the local arts economy. In March of this year, the new corporate arts fund funneled $200,000 to local arts groups through the arts council, an amount close to the $250,000 the city government spends on the arts annually. In addition, one Business Council member, Freeport McMoran, pledged $5 million for the arts over the next five years as a matching grant. Already 46 companies have agreed to a match, and collectively they will donate $2 million a year for the next five years.

Although an immediate funding need has been met with the establishment of the corporate arts fund, the arts council has continued its efforts to focus on other arts needs. Along with providing management help and other services to local arts groups, it has been deeply involved in creation of a major downtown arts and cultural sector, which, when completed, will concentrate art activities and arts-related residential and commercial uses in the historic downtown area. The sector will provide the setting for an international arts festival in 1992. ●

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11-13, *Robert Sharpe & Co.* seminar "Designing a Planned Giveing Program" at the Royce Hotel, Williamsburg, VA. For information call Wendy Ansbro 901/767-23

12-14, *National Center for Database Marketing, Inc.* presents its second annual conference and exibition, to be held at the Buena Vista Palace, Orlando, FL. For more info. call Marsha Garland at 916/292-3000.

13, *National Business Circulation Assn.* monthly meeting. Topic: Holiday Gala. For more information call Steve 212/545-5140.

19, *Long Island Chapter NSFRE* montly meeting at Hofstra Club, Hofstra University. Speaker: Bill Olcott. Topic: "Future of Fund Raising". For information call 516/560-6524.

1990

JANUARY

27-31, *National Religous Broadcasters* Annual Conference to be held at the Sheraton Washington Hotel, Washington, DC. For more info. call 201/428-5400 or FAX 201/428-1814.

FEBRUARY

19-22, *Christian Ministries Management Assoc.* presents the 1990 Christian Management Institute at the Disneyland Hotel, Anaheim, CA. For more info. call 714/861-8861.

MARCH

11-14, *National Society of Fund Raising Executives* International Conference on Fund Raising, to be held at Marriott's Orlando World Center, Orlando, FL. For more info. call the NSFRE at 703/684-0410.

15-16, *Independent Sector and the United Way Institute* present the Spring Research Forum to be held at the Lafayette Hotel in Boston, MA. For more info. call 202/223-8100.

STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION (Act of October 23, 1962 Section 4369 Title 39 United States Code)

Date of filing, December 1, 1989
Title of Publication, Fund Raising Management
Frequency of issue, Monthly
Location of known office of publication, 224 Seventh Street, Garden City, NY 11530
Location of the headquarter of general business officers of the publishers Same
Names and addresses of publisher, editor and managing editor Publisher Henry R Hoke Jr , 224 7th Street, Garden City, NY 11530 Editor, William Olcott, Hoke Communications, Inc , 224 7th St , Garden City, NY 11530
Owner Hoke Communications, Inc , 224 7th Street, Garden City, NY 11530
Stockholders Henry R Hoke Jr , 224 7th Street, Garden City, NY 11530
Known bondholders, mortgages, and other security holders owning or holding 1 percent or more of total amount of bonds mortgages of other securities Henry R Hoke Jr , 224 7th Street, Garden City, NY 11530
This item must be completed for publication except those who do not carry advertising other than the publisher's own and which are named in sections 132-231, 132-242m and 132-233, postal manual (section 4355a, 4355b, and 4356 of Title 39, United States Code)

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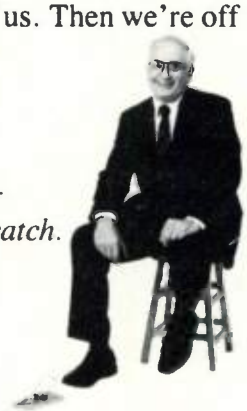

James J. Biggins
Chairman of the Board
and Chief Executive Officer

ACB

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