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People Helping People



Developing and Using a Gifts Catalog

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ACKNOWLEDGMENTS

This guide updates and builds upon the *Gifts Catalog Handbook* published by the Heritage Conservation and Recreation Service in September 1978 and the gifts catalog information that was subsequently published in 1983 by the National Park Service. Some of the original material has been retained, but changes reflect the experience with gifts catalogs which recreation and park agencies have gained in the 6 years since the original handbook was published.

The gifts catalog development materials and the materials in Appendices A and C were made available by Ray Murray of the National Park Service, and the material in Appendix B was prepared by Marie Dixon of the City of Anaheim.

The five case studies which are included in this guide were selected because they report successful use of gift catalogs and because they illustrate strengths. In developing these case studies, assistance was provided by:

Ray Murray, chief; Parks and Recreation Technical Services, National Park Service, San Francisco.

Jack K. Bubenik, executive director; River Parks Authority, Tulsa, Oklahoma.

Marie Dixon, recreation services manager; Anaheim, California.

Rick Dodge, administrator; Department of Leisure Services, St. Petersburg, Florida.

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Developing and Using a Gifts Catalog

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GIFTS CATALOGS — A PROVEN SOURCE OF EXTRA RESOURCES

Although the gifts catalog concept was first introduced in the public park and recreation field in the mid 1970's, relatively few agencies have embraced the idea and implemented gifts catalog programs. Examples of success with gifts catalogs exist in every corner of the country. Yet only a few recreation and park agencies have chosen to use this nontraditional method of

attracting resources.

The intent of this publication is to encourage more park and recreation agencies to use this resource-producing tool by providing (1) guidelines for implementation developed from successful gifts catalog programs and (2) a series of case studies documenting the success of some agencies.

WHAT IS A GIFTS CATALOG?

A gifts catalog illustrates, describes, itemizes and prices specific leisure service and conservation or preservation needs. Individuals, neighborhood organizations, school groups, service clubs, businesses and corporations can select items from the catalog's list of projects and programs. Cash, materials, equipment, labor, expertise and professional services can be given to an agency for the specific project or program which the donor wishes to support.

A gifts catalog is a fundraising adaptation of the retail

sales catalog concept. Picture your prospective catalog as a Sears® catalog of community giving. Just as the Sears® catalog offers a variety of items covering a wide price range, the gifts catalog describes needs that can appeal to potential donors of many income levels or funding preferences. Catalogs can suggest a variety of options. In addition to cash donations, equipment, skills and services are sought because some donors may find these items easier to give than cash.

Gifts catalogs have been produced as booklets, brochures, posters, portfolios, letters, newspaper or magazine articles, even as movies. The key feature is a listing of needs from which a prospective donor may select.

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ADVANTAGES OF A GIFTS CATALOG

Page

GIFTS CATALOGS — A PROVEN SOURCE OF
EXTRA RESOURCES

WHAT IS A GIFTS CATALOG?

Increases Public Involvement

The gifts catalog is a means of reaching large numbers of people at a relatively low cost. It is a tool for increasing public awareness and support. A greater sense of involvement with the public park and recreation system is likely to result in higher participation and interest. The gifts catalog approach can foster an understanding of the problems and costs of providing leisure services by communicating these realities directly to the public.

Donors who pay directly for the project or program they select out of the gifts catalog will have an investment in their park system. People tend to follow their investments closely. Remember how good it felt the last time you helped someone? A gifts catalog program offers everyone in your community the opportunity to feel "that good!" Through a catalog marketing campaign, your constituency of leisure service supporters can be greatly expanded.

Provides a Service to Potential Donors

Most people make contributions of some kind each year. At the beginning of the year many of these people do not know to which cause or service they will give. Putting a gifts catalog in their hands gives them an opportunity to fulfill their basic motivations to do good. The catalog offers a service by helping them find a need to support. Think of those occasions when you have been seeking a gift for a friend. You are usually grateful for the right suggestion. The same principle is true with a gifts catalog.

A handful of typical responses logged by Santa Monica Mountains National Recreation Area in response to its first gifts catalog demonstrates some reasons people give to parks:

- "I have a wealthy friend who is difficult to find a present for. The gifts catalog helped me find the perfect gift."
- "I have had many fine experiences over the years in national parks. I'm glad to have a chance to return the favor."
- "I'm affiliated with a small environmental group which is looking for just such an opportunity to help out."
- "A loved one died recently and I've been looking for a lasting memorial in his memory. When I heard about the gifts catalog, I knew I'd find a suitable project, and now I have."
- "This is great! The National Park Service should have offered this kind of opportunity a long time ago!"
- "Our corporation has been able to help the park, receive favorable publicity, and take a tax deduction."

Gifts catalogs work because they personalize giving. They allow donors to know where their gift is going and to select a gift with which they can identify.

Increases Awareness of an Agency's Needs Among Prospective Donors

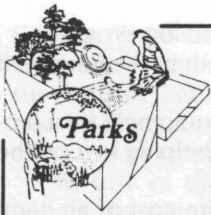
The gifts catalog links an agency and its potential donors. It stimulates donations by increasing awareness of the agency. The catalog allows the department to state its needs to potential donors without interruption. However, personal follow-ups are necessary to secure most large donations, so prospects must be convinced of the department's merits. Help the prospect justify a gift by telling your story. Relate the department's successes and the level of community satisfaction with your agency. But also say, "We need your help to continue..." As Rick Dodge, administrator of St. Petersburg's Leisure Services Department, noted:

Gifts catalogs are attractive because they provide local citizenry specific information about the short- and long-term goals of the parks and recreation department. Even though a specific gift, such as the construction of a new softball field, may not be donated, the fact that it is listed in the gifts catalog reinforces your department's commitment to provide a facility that softball players desire.

The gifts catalog reaches
many people at a relatively
low cost.

Offers Tangible Gifts to Potential Donors

No matter who your target audience is, a strong selling point for a contribution to parks and recreation is that nearly all of the offerings in a gifts catalog are tangible. Emphasize the fact that evidence of a gift is visible not just at the time it is given, but also during subsequent years. For a business, this offers a lasting form of favorable visibility, improved employee morale, and an ongoing reminder of a leadership position in the community.



Anaheim is very fortunate to have so many beautiful parks for everyone's enjoyment. With new parks being dedicated and continual upkeep of existing open space areas, we need help in furnishing them with a variety of items. Would your company like to "take on" a park project worthy of official public recognition?

PLAY EQUIPMENT \$500-\$20,000

Those favorites of young people! Swing sets, bars, wooden play structures, etc., are needed to replace old structures at many parks. Leave a legacy of fun for future generations! Your firm's name associated with a project like this will really establish that image you're looking for!

EXERCISE/JOGGING COURSE \$6000

Fitness is in! Flab is out! A couple of our large parks could contain this self-serve station-to-station course of exercises designed for all around fitness. Help us fill the need for more fitness activities!

FRISBEE GOLF COURSE \$5000-\$7000

Frisbee madness has hit Anaheim! The existing course at Reid Park is constantly being used. We need another course at a different park to meet the community's needs for Frisbee fun! Metal baskets for the holes and starting blocks for tees provide an easy-to-follow course. A formal dedication of the course by City Council members will recognize your generous contribution to Anaheim's leisure needs!

OUTDOOR CLASSROOM \$2500-\$3500

To be used at Oak Canyon Nature Center for the "Indian Summer" children's program as well as others. It would consist of wooden benches "amphitheatre style" and a platform. This naturally beautiful setting is ideal for outdoor educational programs on nature topics. What a great project for your corporation!

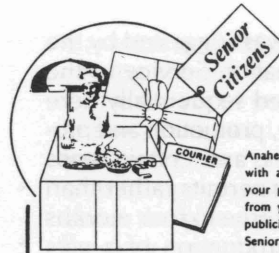
GROVE OF TREES \$60 ea. or \$600-\$1200

To plant in new parks and existing park areas. Establishing a grove of trees which people can enjoy for decades, is a truly worthwhile project for your firm. Help create a natural environment in your community!

OTHER DONATION OPPORTUNITIES FOR PARKS ARE:

- Park Identification Signs \$2000 ea. park
- Park Trail Guides and Signs \$500 ea. park
- Park Directional Signs for Nearby Streets \$50 ea.

Parks



Anaheim has the largest Senior Citizen program in the country with a club membership of over 5,000. Do the elderly use your product or service? If so, both of you could benefit from your gift. Your donation is badly needed and would be publicized and duly recognized as a fine contribution to the Senior Citizen Movement!

CHAIR-LIFT ELEVATOR \$10,000

To transport handicapped individuals to the second floor of the Anaheim Senior Citizens Center, where they can participate in classes, billiards, and other recreational activities held upstairs. A plaque installed at the elevator would testify to your generous donation while passersby will see your demonstrated concern for the handicapped and elderly!

SHOW WAGON RENTAL \$400

To be used at the Senior Citizens All-States picnic held annually in August. This portable stage provides a place for day-long entertainment for Seniors who look forward to this event all year long. Can you picture hundreds of Senior Citizens enjoying the entertainment and seeing your firm's name on a large banner attached to the Show Wagon?

FIVE (5) SELF-CONTAINED BLOOD PRESSURE CUFFS \$250 each

To be used by Seniors themselves in taking their own blood pressure. Your donations would keep hundreds of elderly aware of their health status, thus preventing undetected illness. YOUR gift would be highly publicized by local newspapers, whose pages are regularly filled with health and Senior Citizen stories!

ONE (1) MONTH'S PRINTING OF THE "COURIER" \$1,000 or in-kind service

The official publication of Anaheim Senior Citizen's Club, Inc., needs financial assistance (or in-kind service) for printing. Recognition of your donation, as printed in the "Courier", would go to over 5,000 Club members.

OTHER PROJECTS WHICH COULD USE YOUR ASSISTANCE ARE:

- Sponsorship of the Annual All-States Picnic \$2,000
- Four (4) Sun-Covers for Tables in Colony Park \$300 each
- Christmas/Thanksgiving Meal Donations \$200

Senior Citizens

Figure 1. Inside the corporate edition of the Anaheim "Gifts Catalogue."

DEVELOPING THE GIFTS CATALOG

Gifts catalog programs have been successfully developed, coordinated and used by both in-house staff and by outside advisory boards, foundations or committees. There are advantages and disadvantages to both approaches.

On one hand, a gifts catalog managed outside the agency or organization by a board or committee may involve more grass roots commitment and involvement. Further, in some situations outside groups are able to focus more resources more directly and can produce a catalog faster than an agency. A catalog is an ideal project for a park foundation associated with a public

agency such as the Tulsa Park Friends whose success is discussed in the case study on pages 11 and 12.

On the other hand, an in-house catalog can be given constant attention and effort. The department is not dependent upon voluntary effort which may be inconsistent, but can allocate the personnel resources that successful implementation requires. A gifts catalog program may also bring a public agency closer to its constituents and facilitate internal communication because personnel across the agency become aware of overall departmental needs.

A seven-step approach to developing gifts catalogs

has been widely adopted since it was suggested by the Heritage Conservation and Recreation Service in the mid-1970's. The process is outlined sequentially here but really is not linear. For example, promotion and production are overlapping processes, and certain steps will be undertaken as opportunity permits rather than in the strict sequence presented. Three to four months is a reasonable time frame for production of a gifts catalog. One person must have overall coordination responsibility for production.

Stage 1: Inventory and Documentation

The inventory of a department's needs to be displayed in the catalog should be comprehensive. The idea is to portray a full range of gifts from which private donors can choose. Alongside each item, place a brief narrative describing the need and the estimated price. It is difficult to predict the response to a specific item in a gifts catalog. Analyses have shown that donors are interested in contributing to a wide variety of park needs.

Gift catalog programs should attract differing size contributions. Consider that you may be shaping long-term giving patterns and preferences. The person who can only make a small donation today may be able to donate more in the future.

An individual or corporation may donate \$100,000 for the construction of a new park, but a class of fifth graders may also contribute \$10 to purchase bird seed for a nature center. Recognition of the importance of both gifts is fundamental to a successful long-term campaign. Your local media may focus a human interest story on the fifth grade's contribution, providing free promotion for your program.

Stage 2: Design and Production

Since the design and production of the gifts catalog has much to do with its success and response, make sure your final product has an engaging graphic design. It may be possible to persuade a local firm to produce your catalog by donating its time and talents as a "gift."

The layout of the catalog affects the image of your agency as perceived by target groups. Present your products in an image-enhancing manner. A cheaply done catalog will not convey the image of a program with which donors wish to be associated. A well-designed catalog represents quality and promotes a good departmental image.

For a gifts catalog to be effective, it must be done right. Adequate staff time *must* be invested both in preparation and subsequent management to ensure a product that will interest, convince and assist prospective donors.

Provide information on tax deductibility. As a public agency or a tax-exempt, nonprofit organization, one of your key selling points is the tax deductibility of the value of gifts. Without specifically citing tax deductibility, an agency may lose potential gifts.

Provide giving options so more citizens will feel com-

fortable participating in the gifts catalog program:

- Suggest that either cash for an item or the item itself will be welcome.
- Someone interested in donating equipment for a program might also be interested in helping to fund the program.
- If a donor cannot afford the entire cost of an item, encourage that person to contribute to its partial cost.
- Encourage neighbors to join together to give a gift.

Keep the size manageable. Many gifts catalogs designed for general distribution are small enough to fit into a regular size envelope and run from 5 to 10 pages. Large formats offer more opportunities for illustrating park needs but are more expensive to print and mail. Provide tear out forms and include franked envelopes in mailouts to facilitate easy response.

Stage 3: Selecting Target Audiences

As you develop the catalog, ask "Who is my target audience?" The answer will suggest possible format, theme and title. It will also give you an idea of how many catalogs should be printed. The needs you select for the gifts catalog should relate to the concerns and goals of the target donor audience. Identifying your target audience is a prerequisite to virtually every aspect of the gifts catalog process.

Most gift catalogs are "shotgun" approaches that present potential gift suggestions in many price ranges. In a first catalog edition this strategy may be good, but the contributions resulting from your first publication should help you better target when the catalog is reprinted. A clear idea of the target audience helps you decide items which should be included in the catalog.

Who you choose for target markets depends to a great extent on the composition of your particular community. In general, though, businesses and corporations, civic groups and carefully selected individuals are likely to be the most responsive target audiences.

Some cities have developed separate catalogs for different target markets. For example, Anaheim, California developed separate catalogs for corporations; civic groups, school groups, neighborhood organizations and foundations; and individual citizens. Even this approach did not enable the Anaheim department to target and tailor its gift solicitations as specifically as the staff wished. Hence, the permanent catalog was replaced with a portfolio which could be quickly adapted to solicit gifts for particular projects from more specifically defined target groups. The portfolio approach incurs lower production costs, permits narrower targeting, and allows updating to be done quickly at minimum cost.

In selecting target audiences for the catalog, carefully assess their relative "giving potential." Distinguish between small, medium and large givers within the selected individual, civic and business groups, and concentrate your efforts on the largest givers. Your fundraising effort will be the most efficient if you focus on these so-called "heavy users." The March of Dimes, for instance, found that 20 percent of the population in Travis

County, Texas made 43 percent of the contributions. They also found that eliminating one-half of the census tracts in that area from their direct-mail campaign had no effect on net returns and enhanced their efficient use of resources.

The text of the catalog should sell the potential benefits to your target market if prospects donate the items requested. Mention only benefits with which the prospect can identify. Use a lot of graphics and pictures to show the products but also use persuasive words which emphasize benefits.

In conceptualizing the contents of a gifts catalog, try to "package" the image of your agency in a manner which target audiences find desirable and are willing to purchase. Sears'® automotive division does not sell batteries, they "install confidence." The cosmetics manufacturer Revlon® sells "hope," not lipsticks and blushers. AMF® sells "weekends," not merely sporting goods. Similarly, the gifts catalog has to offer something besides drinking fountains and trees. If you need a fountain for a playground, for example, ask someone to provide an "oasis in an asphalt jungle." Although pictures are an effective communication technique, words are also important. For example, if you are seeking donations to purchase large-print books for the elderly, the phrase, "new large-print books—for not so new eyes," may grab the reader's interest.

If you are targeting a catalog to corporations, stress the fact that contributions are an investment. They (1) improve the quality of life in a community—its livability—which makes it easier to retain and recruit quality personnel to the area; (2) build company visibility; and (3) enhance a company's image of commitment and leadership in the community.

Stage 4: Promotion

Develop a promotion strategy even before the gifts catalog has reached the design stage. The promotion strategy involves plans for *distribution, publicity before and after the catalog is distributed* (arranging for feature articles in local and regional newspapers, kick off events, and so forth) *donated advertising, recognition of donations* and *follow-up solicitations*. Get the word on the gifts catalog out early and often. A prepublication publicity campaign might make use of free public service announcements on radio and television. What's more, the problems facing recreation and park agencies are newsworthy, and a gifts catalog is sufficiently innovative to be of interest to the local news media.

Approach the outdoor advertising industry to donate billboard space. Maybe a cryptic billboard proclaiming "The Parks Gifts Catalog is Coming!" would stir up some interest ahead of publication.

Arrange a kick off event. Involve some local "personalities" in a community bash to focus attention on the gifts catalog. Arrange to announce a few gifts from donors at the kick off; nothing creates momentum like early success.

Crucial to the success of the gifts catalog is its accep-

ance immediately after distribution. By this time, the catalog should have become a household concept.

The timing of your gifts catalog release is especially important. Special holidays, such as the Christmas giving season, have proven to be ideal times. Holidays also offer an opportunity to provide updates and reminders about the gifts catalog's availability. A gift of a tree to the park system may be an attractive alternative to an individual who has previously given flowers on that occasion. Push your promotion during the months before individual and corporate tax preparation.

Certainly the Christmas season is an ideal time for people to be reminded that the gifts catalog is filled with gifts that could add a new dimension to their holiday giving. Many people would be happier to have a gift donated to the community in their name than to receive a bottle of perfume or a new set of cuff links. Other gift-giving holidays like Mother's or Father's Day, offer opportunities for promoting a gifts catalog. On the other hand, avoid late summer when many people are on vacation and early spring because that is tax filing time and people are unlikely to be inclined toward giving.

Stage 5: Distribution

The distribution strategy should ensure delivery of the catalog to the preselected target audience. Possible distribution techniques include mass mailing, newspaper supplements, mail lists from local credit card companies or utility companies, or special displays in libraries, schools, banks and other retail establishments. Whenever possible, address the mailing to a specific individual in an organization. There is less possibility that it will be ignored. If you have identified some potential donors, combine a personal letter accompanying the gift catalog with a follow-up visit or phone call. After the initial distribution, look for every opportunity to personally put the catalog in the hands of prospective donors.

Develop a number of different cover letters for various target audiences. The business community may receive a letter which points out the hard economic realities facing the department and highlights the public relations and income tax deduction advantages of giving through the gifts catalog. Civic organizations may receive a letter oriented to their service ethic. Individual residents, identified from voter registration or utility lists, may be sent an appeal based on their desire to "make a difference" in the quality of community recreation.

The gifts catalog could be mailed to households as an enclosure with water bills, utility bills, bank statements, credit card billings, retail catalogs, or even with property tax assessments. Maybe the local newspaper would include the catalog as a supplement to a special edition. If your agency or organization must cover the cost of distribution there are ways to defray the normally high costs of a mass mailing campaign. Bulk rates, available through the post office, can substantially lower the mailing costs.

Search for differential advantages to reach different

target audiences. Identify the components of your reputation which can be exploited to create a special value in the minds of your customers. As an illustration, the Island of Nassau competes against Miami for tourism by advertising its more dependable weather. The differential advantage for gifts from your catalog, compared to other kinds of gifts, could be that donors can direct funds where they want, can see how funds are spent, and can see the results of their spending for many years to come.

The gifts catalog only facilitates, it alone will not convince many to give. Follow through is required. Only limited results can be expected from a mail distribution. It's just the beginning. Suggestions on how to arrange and structure follow-up meetings are in Appendix A.

Include in your gifts catalog the name, address and telephone number of one informed individual who will be the department's contact person. The most likely individual in the department to receive and respond to these inquiries is the director. The farther the process is removed from the chief administrator, the less important the catalog will seem to potential donors. Some agencies have been successful enough in fundraising activities to employ a "development officer," who serves as contact person.

Asking for donations is a science and an art, and as such must be mastered by studying certain basic concepts and then adapting these concepts to meet your particular needs and abilities. Many people are reluctant to ask for donations—it makes them uneasy and anxious. This anxiety can be reduced if you follow a basic process, and if you have received adequate instruction in how to ask for donations.

Appendix A provides hints on how to successfully solicit donations. You may find that some ideas given in the Appendix suit your situation or personality better than others. This is where science ends and your creativity begins.

Stage 6: Recognition

Indicate what recognition is attached to gifts of various values. Be specific. If the donor of a gift worth \$100 is to receive a framed certificate of appreciation, then say so. Exercise some subtlety, so that the appeal for gifts remains on the human level, but let a potential contributor know what he or she can expect in the form of recognition. Again, list credits in the catalog for those who donate to its design and production.

Recognize every bit of generosity, large or small. Recognition can spur others to contribute or lead to future donations from the same source. Show genuine appreciation in a personal way, by phone call or letter *immediately* on receipt of the gift. Later, public recognition can be arranged for publicity purposes as well as wider acknowledgment, but the donor should not have to await a ceremony before he or she is thanked. Remember that some donors may wish to remain anonymous or prefer not to be acknowledged in the

news media. Respect these feelings and never arrange a ceremony without the consent of the giver.

Emphasize in the catalog that the gift "returns the favor." Not only does the value of a gift provide a tax deduction, but appropriate individual recognition will be given. The scope of your recognition program should fit the size and type of the gift, and this spectrum could include signed and recorded certificates presented at a special meeting of the city council, engraved donor plaques affixed to capital projects, names of donors listed in subsequent gifts catalogs, or whatever fits the desires of your community.

Often, the appropriate recognition is discovered during consultation with potential donors. Knowledgeable and cooperative staff who *listen* carefully can best determine how an individual's or company's contribution can be recognized. Some of your largest benefactors may seek anonymity for a variety of reasons, and the long-range success of your gifts catalog program will depend upon exercising good judgment in recognition selection.

Stage 7: Evaluation and Revision

View your gifts catalogs as an ongoing program—not a one-shot effort. To define a more effective market strategy, reflect the information gathered from previous efforts in revised editions. Evaluating the gifts catalog program may be a perfect opportunity to involve private sector individuals in the form of a board, committee or special nonprofit foundation.

Review the gifts program by analyzing tendencies in two areas—the number of donors and the average gift size. One goal of a gifts catalog program should be to increase both the number of contributors each year and the average gift size. Pay special attention to the "penetration" your program has (for example, the number of contributors compared to the total potential number of contributors in the target market). If 20 percent of the total market gave last year, identify who they are, what they have in common, and which of the other 80 percent of the market are most similar to those who gave. They then become a prime new market. If other recreation and park agencies in your area have gifts catalogs programs, compare your effectiveness with theirs. If your share of the market is smaller, find out why.

The bottom line in measuring the overall effectiveness of your gifts catalog program is net revenue, not the total amount of resources raised. Generally, if the expenses incurred in your gifts catalog program range from 10 percent to 20 percent of contributions, your expenses are at an acceptable level. If your expenses stray much higher than 20 percent, look for ways to increase efficiency.

CASE STUDIES

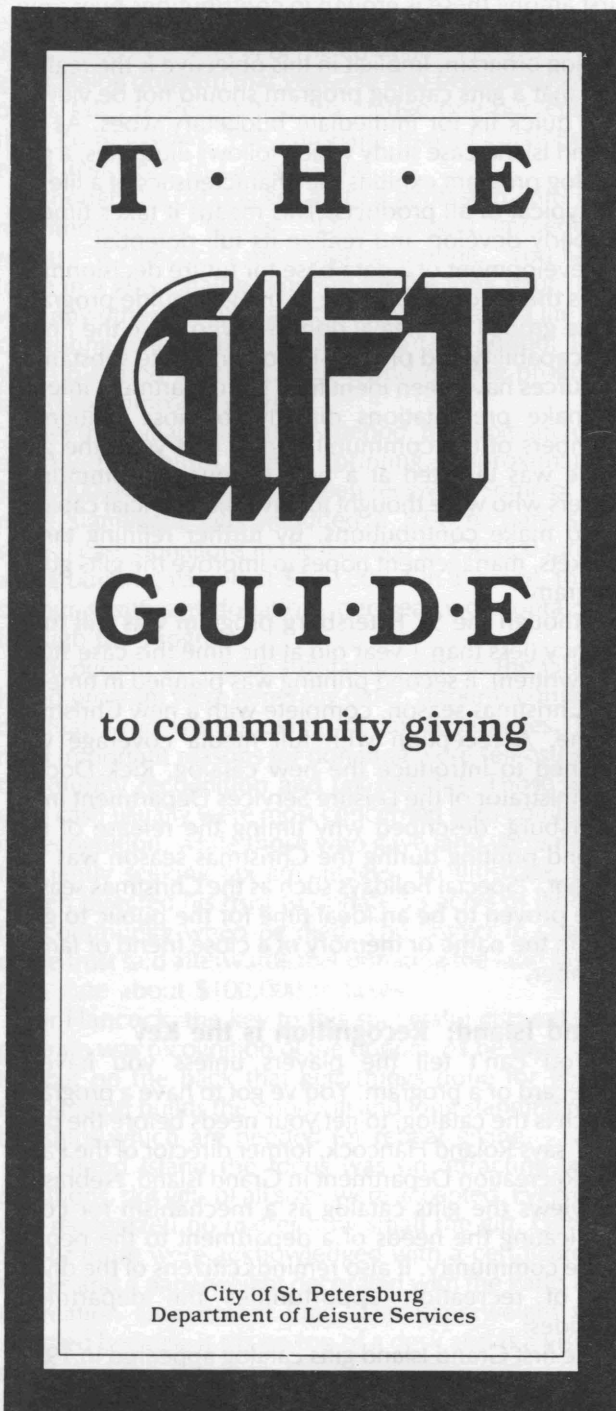


Figure 2. The St. Petersburg Department of Leisure Services' gifts catalog.

In the following sections, five case studies which show how the general stages in developing a gifts catalog program have been successfully implemented are described. These case studies were selected because they each illustrate different strengths. Communities intending to develop a gifts catalog may find it useful to draw from these successful experiences.

St. Petersburg: Developing a Gifts Catalog

The St. Petersburg Department of Leisure Services' gifts catalog was launched in 1982. Within the first year it generated \$40,000 in contributions. Because it is relatively new, the St. Petersburg gifts guide demonstrates the stages of development.

A primary focus in the formative months was upon research. Rather than "reinvent the wheel," the staff sought input and advice from other agencies who were operating a gifts catalog program.

A comprehensive list of agencies which had prior experience with a gifts catalog was compiled. This base list was then expanded by asking agencies previously identified as catalog users whether they knew of other agencies using gifts catalogs. All of the agencies located in this manner were then contacted to discover what steps they had taken in producing their catalog and what advice they had to offer. Discussions were also held to solicit advice from professional fundraisers in the St. Petersburg area.

Once all of the information gathered from outside sources had been collected, the management staff held a series of discussions concerning the catalog's contents. Staff members were encouraged to suggest "pet" projects which had not received departmental funding. These suggestions constituted the inventory of departmental needs from which selections were included in the catalog.

The St. Petersburg staff believes that the high quality of the catalog's design and production contributed much to its success. The gifts guide was developed with an awareness that an attractive product is likely to create a better community-wide departmental image and induce more support than one hastily and shoddily done. It is an attractive two-color booklet divided into sections, which list the needs of each division in the Leisure Services Department. Each section is headed by an engaging graphic design representing that division's functions.

The gifts guide relates the benefits its audience will receive from contributing. Themes are used liberally and a variety of image-building concepts are scattered throughout its pages. Emotional appeals are used, but are interspersed with benefits which appeal to businesses (see page 2) so that the catalog may be directed at both individuals and business.

After the catalog had been drafted, the next step was to make influential community figures aware of it. Just before the catalog's completion, the department's management staff contacted primary prospects for contributions. Management was careful not to initiate these contacts too soon because promoting the catalog before the final stages of production would cause the initial impact to be lost, inhibit momentum, and hinder future effectiveness. For example, the staff believed that trust officers and lawyers, who were identified as prime targets, would disregard the gifts catalog if the concept was presented before it was fully developed.

The first edition of 10,000 copies cost approximately \$700 to print. Production costs were donated by members of the city council who contributed money leftover from their campaign funds. The gifts guide was greeted with a barrage of favorable media coverage.

Distribution concentrated on individuals in the community who were perceived to be "gatekeepers," that is, those having access to many potential contributors. Business leaders (identified from a chamber of commerce list), community groups, bankers, attorneys, school board members, and key school personnel were sent gift guides. Individual citizens were sent gift guides only if they contacted the department and expressed interest in the program.

To involve key gatekeepers in its overall donation effort, the Leisure Services Department cosponsored a seminar on the subject, "Family and Business Tax Planning Under the New Tax Laws." The seminar was conducted by a nationally-known expert on tax laws. It attracted 140 attorneys, trust officers, accountants and other business people who not only received current information in their professional fields, but also listened to a presentation on how the Leisure Services Department could meet their clients' giving needs, and a briefing on the department's gifts catalog and bequest programs. The opportunity for senior department personnel to interact with and present their case to these key gatekeepers ensured awareness of the gifts catalog among potential large contributors.

In the program's first year, library services and nature programs were the most popular recipients of contributions. In general, donors are from upper income brackets, highly educated and, in the case of library patrons, culturally inclined.

Every contribution is recognized in some way to reinforce the giving cycle and inspire donors to give again. The scope of the recognition program in St. Petersburg is tailored to the type and size of the gift. The department feels that the most appropriate way of saying "thank you" can be determined through conversations with each individual donor. Recognition has ranged from a certificate to the presentation of plaques at ceremonies held before city council.

It seems that most contributors gave because it "made them feel good." Another factor was that a gift to the Leisure Services Department was tangible and highly visible. Others can see it; it is long-lasting; and it pro-

vides a feeling of contribution to the community. Generally, people are more prepared to donate "niceties rather than necessities" which they regard as part of government's normal responsibility.

The future course of the gifts catalog program will be directed by the department's fundraising objectives. First among these is growth in contributions over time. This is crucial to the long-term success of any gifts catalog program. Implicit in this objective is the realization that a gifts catalog program should not be viewed as a quick fix for immediate budgetary woes. As the Grand Island case study which follows illustrates, a gifts catalog program exhibits the characteristics of a life cycle typical of all products. This means it takes time to properly develop and realize its full potential.

Development of a data base for future decisionmaking is the second objective of the gifts guide program. Once groups of "heavy donors" who have the financial capability and propensity to contribute substantial resources have been identified, the department intends to make presentations directly to those influential members of the community. In its first year, the gifts guide was targeted at a broad group of community leaders who were thought to have the financial capability to make contributions. By further refining target markets, management hopes to improve the gifts guide program.

Although the St. Petersburg program was still in its infancy (less than 1 year old at the time this case study was written), a second printing was planned in time for the Christmas season, complete with a new Christmas theme. A reception with full media coverage was planned to introduce the new catalog. Rick Dodge, administrator of the Leisure Services Department in St. Petersburg, described why timing the release of this second printing during the Christmas season was important, "Special holidays such as the Christmas season have proven to be an ideal time for the public to give gifts in the name or memory of a close friend or family member."

Grand Island: Recognition is the Key

"You can't tell the players unless you have a scorecard or a program. You've got to have a program, which is the catalog, to get your needs before the people," says Roland Hancock, former director of the Parks and Recreation Department in Grand Island, Nebraska. He views the gifts catalog as a mechanism for communicating the needs of a department to the people in the community. It also reminds citizens of the diversity of recreation opportunities the department provides.

The first Grand Island gifts catalog appeared in 1975. A total of 28,000 copies were printed, costing about \$500. This represented almost one copy for every member of the 33,000 population of Grand Island. Distribution was handled by the chamber of commerce and by department staff members directly contacting civic group leaders, government administrators and

business groups in town. Attorneys, elected officials, representatives and advisory councils were all asked to spread the word. At each meeting the needs of the department were expressed, and gift catalogs were handed out.

In the first year, the best distribution source for the gifts catalog was a local insurance company. The senior executive adopted it as a company sponsored program and pledged 10 percent of the company's profits to the gifts catalog program that year. He also persuaded each of his sales representatives to pledge one percent of their commissions. The company mailed catalogs to every residence in Grand Island.

Although the catalog got off to a good start, gifts did not immediately follow. "Don't expect immediate results," is Hancock's most urgent warning. "You have to be in a gifts catalog program for the long haul." As with any other product, a gifts catalog exhibits a life cycle during which there is a slow start-up period. This start-up period for the Grand Island catalog program lasted for almost 3 years.

After this initial introductory period, the program took off. By the fourth annual printing, approximately \$700,000 worth of gifts had been received. Some of the more significant gifts included a 53-acre park site, several cash donations in the \$25,000 to \$30,000 range, and a building valued at \$100,000. On average, three or four significant donations per year were obtained through the program.

The people who gave substantial gifts in the Grand Island program were generally older, upper-income individuals who were looking for tax advantages. The most important reasons for donating were self-esteem, community recognition and tax benefits. Those who gave cash usually were most concerned with community recognition, while those who gave land were more frequently seeking tax advantages. To illustrate, one citizen directed his trust to donate 53 acres of land to the community when he died. The lawyer in charge of the trust said afterwards that donating the land saved the estate about \$100,000 in taxes.

For Hancock, the key to this successful gifts catalog program was recognition of the donors. As he says, "It's the pat on the back that gets things done for you." Recognition builds the goodwill and long-standing relationships which are needed for repeat giving.

In Grand Island the focus was on attracting large donations, but gifts of all sizes were accepted. Everyone was recognized no matter how small the gift. Gifts of \$15 or more were acknowledged with a certificate of thanks and a paperweight decorated with the Parks and Recreation Department logo. The paperweight was selected because it sits on top of a desk and is a visible symbol of the donation.

People who donated more than \$100 got a personalized plaque etched in gold. The plaque was presented at a formal ceremony by the mayor. Donations exceeding \$1,000 rated a presentation by council, complete with media coverage. If the donor was a member

of a local civic or business group, council members presented the token of recognition at a meeting of the group in order to get others excited about contributing. After the presentation ceremony, an 8"x10" color photograph of each donor was posted for a month in the "Hall of Fame," located in the lobby of city hall.

Timing of the recognition is also important. If timed properly such ceremonies may have a positive impact on a city council at budget time. In Grand Island, presentations were scheduled to coincide with budget hearings. According to Hancock, "If you're asking for \$1.5 million and the council has just made presentations to people who have donated \$100,000, it would seem miserly if they were to reduce your budget after recognizing the open-handed generosity of public spirited donors."

Recognizing donors fosters a sense of community spirit and goodwill. Hancock relates the following story of how these feelings can inspire others to jump on the bandwagon.

I was visiting a banker who had given a large donation and had the paperweight on his desk. Another banker walked in on a casual visit while I was there. He said, "Where did you get that?" The reply was, "It cost me \$50,000." They talked about it for a bit. The other banker was in my office before the day was over, volunteering a substantial gift. One bank doesn't like to see itself upstaged in the community by another bank.

Recognition in Grand Island also encouraged this year's donors to be bigger and better donors next year. Every time someone was recognized they were identified as a prime target for more extensive giving in the future. Many who gave \$15 one year were persuaded to give \$100 the next year. The individual who gave \$100 was viewed as a possible \$500 candidate the following year. Although many factors contributed to the success of Grand Island gifts catalog program, Hancock attributes much of its effectiveness to recognition.

Anaheim: Using a Portfolio Format

The Anaheim catalog program has been operating for 3 years. It has been revised each year, and each revision represents a refinement of target audiences. The first catalog was general and aimed community-wide at the mass market. The second edition was targeted at businesses. About 1,000 copies were printed, and this second edition produced \$100,000 worth of contributions.

Even though the second edition was reasonably successful, management felt it could develop a better catalog which would attract more contributions, be oriented to specific projects, and cost less to produce. Hence, the third edition used a portfolio format and emphasized community involvement by using the theme "Anaheim Life. Be In It." The portfolio format can be geared to soliciting gifts needed to meet the specific requirements of a project and directed at carefully defined target markets. It enables an agency

to update the information and change the target audiences as its gifts needs change.

The portfolio catalog contains a cover letter relating to a specific business or target group, and a series of one-page sheets which describe and inform the reader about specific gifts needed to bring the project to fruition. All the portfolio catalog contents can be geared to a new target audience by changing the cover letter and project sheets, and requesting different gifts.

The primary thrust of the gifts solicitation effort in Anaheim is directed at corporations. Many of the gifts consist of in-kind products or materials rather than cash.

The effort is based on three principles. First, an overall strategy governs and directs the agency's total attempt to attract corporate resources. Second, a corporate contact office for approaching potential donors was formed within the Parks, Recreation and Community Services Department. Third, a data base was established to aid in future decisions.

The overall strategy involves developing a systematic method for obtaining corporate resources. Until 1982, each division within the Department of Parks, Recreation and Community Services had its own independent

program for soliciting donations. Often there was no communication between divisions on fundraising. Whenever one division conducted a fund drive for specific projects it did so independent of the rest of the organization. There was no coordination between individual campaigns.

Staff members recognized that this lack of coordination impaired the fundraising effectiveness of the department as a whole. For example, no records were kept concerning which companies gave, which did not give, or why. Every year each division started from scratch with its own fundraising effort. The department committed itself to develop a more ambitious, coherent approach to fundraising which would integrate the efforts of all divisions in the agency. This led to the establishment of a corporate contact office within the department. The objectives and organization of this office are discussed in Appendix B-i.

This office is staffed by a city employee whose role is to coordinate and direct the efforts of volunteers in acquiring gifts. The time invested in the solicitation effort is primarily volunteers' time. A key principle of the corporate contact program was the development of a data base, recording fundraising activities department-wide. Information entered into the data base serves as the foundation for all future efforts to attract resources. Each division serves as a node in the information gathering network. Every time a potential prospect is contacted, a record of the meeting is kept on a "contact sheet." The contact sheets record who was contacted, when they were contacted, a list of actions detailing the degree of success of the solicitation effort, and the total amount raised (see Appendix B-ii for a sample contact sheet).

The department had two primary objectives when it launched the gifts catalog program. During the first 2 years, its goal was to generate in the corporate community a high degree of awareness of the department's need for gifts. The second objective was to reduce the cost of gathering corporate resources through the use of an ongoing evaluation process. This involves keeping a comprehensive set of contact logs and evaluating the responses to each effort. An example of this evaluation process is given in Appendix B-iii.

In addition, an ongoing analysis of how local economic trends affect corporate contributions identifies industries and corporations which are most receptive at particular times. By keeping these types of records, weaknesses in the department's target marketing can be more readily identified. Target audiences that have been neglected can then be approached, and those which have been relatively unreceptive can be ignored.

The primary goal of the Anaheim corporate contact office is to increase contributions incrementally each year. This implies that the departments' fundraising efforts will become more sophisticated with experience. The department has an integrated system with elements which can be sensitively adjusted to produce more profitable outcomes.

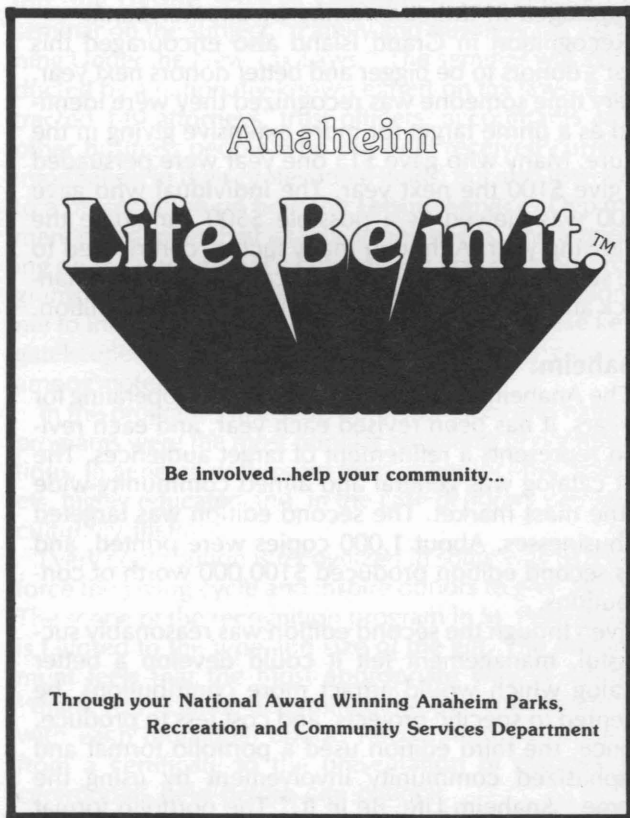


Figure 3. The Anaheim catalog program uses a portfolio format.

PARKS NEED FRIENDS TOO

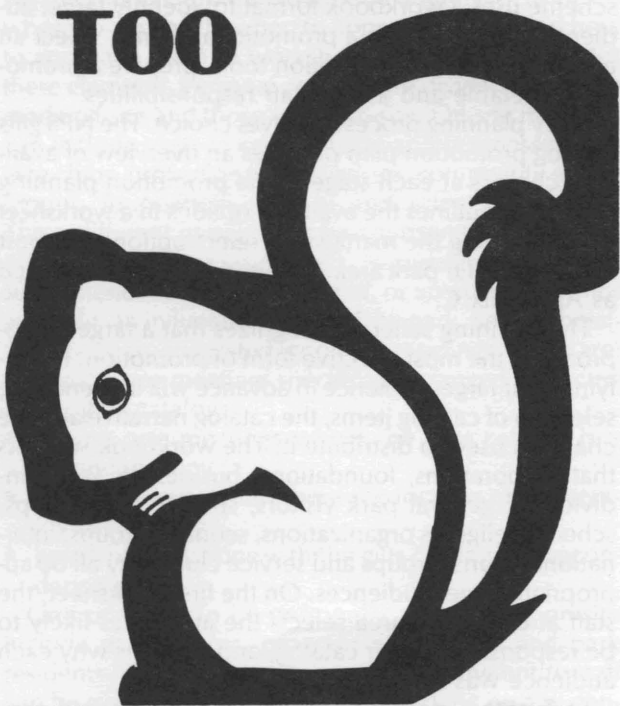


Figure 4. Tulsa Park Friends gifts catalog.

Tulsa Park Friends: Structuring a Fundraising Campaign

Park Friends is an independent, nonprofit, 501(c)(3) organization based in metropolitan Tulsa, Oklahoma. It is devoted to the creation and improvement of Tulsa's city and county parks. It does this in three ways by:

- 1) promoting interest in the development of the parks system;
- 2) encouraging gifts, either monetary or in-kind;
- 3) acting as the agent to receive and administer these gifts, translating monetary gifts into the specific items requested by the donor.

Ever since it was formed in 1975, Park Friends has been a successful fundraising organization. It works closely with the city and county departments and the River Parks Authority in identifying needs and seeking gifts—particularly for new acquisitions. During the last 8 years it has attracted resources totaling \$7.5 million.

The board of trustees of Park Friends has nine members. The Tulsa Park and Recreation Board, Tulsa County Park Board and the River Parks Authority each appoint one member from their governing boards and one member-at-large from the community. The remaining three members are appointed by the Board of Trustees of Park Friends. Park Friends does not have a staff; the three constituent authorities provide staff support.

The Park Friends gifts catalog is only one element in their fundraising effort. The gifts catalog serves as an initial contact device. It is distributed to potential donors, both in the community and among corporations, to create awareness about what Park Friends does. Telling the Park Friends story and listing future needs in an inviting gifts catalog format communicates to the community what the organization has already done for the citizens of Tulsa and what it costs to provide new parks and recreation facilities to better serve the community.

As a result of Park Friends' high level of visibility, many unsolicited gifts have been received. Individual donors perceived Park Friends to be a good outlet for donations because of the high awareness level the organization has created and maintained in the community. Recognition and self-esteem are the most significant benefits people seek when giving to Park Friends. In response to this, Park Friends places a personalized plaque in recognition of the gift on every item donated. Community investment is the second most important concern of contributors. Some companies and individuals believe that because they derive their living from the Tulsa area, they have an obligation to invest some of their resources back into the community.

Increasing overall community awareness is a fundamental task in attracting private resources, but informing the community who you are and what you have done is not enough. Direct contact with potential contributors was the key to Park Friends' success in obtaining private sector dollars. It simply is not enough to distribute a gifts catalog and then to sit back and ex-

pect gifts to automatically follow.

Personal contact is essential. Further, for personal contact to be successful, it is often necessary to persuade an intermediary to work with you. Jack Bubenick, executive director of the River Parks Authority which has been the major beneficiary of the gifts program believes that it takes a peer to open doors, particularly doors to corporate donations.

For long-term success, you must attract persons with such persuasive capabilities to serve as board members. As an example, in 1981 Park Friends was able to persuade the chairman of the board for the Bank of Oklahoma, one of the major financial institutions in Tulsa, to lead their fundraising efforts. Largely through his leadership and commitment, Park Friends was able to obtain \$4.5 million worth of private resources in that year for the River Parks Authority.

Since some businesses and their executives seek to enhance their leadership image through contributions, peer pressure in solicitation of funds is often successful. Bubenick believes that peer solicitation is viewed almost as a game in the corporate fraternity. "They all ask each other to give to their favorite cause, and the stakes get higher every year."

When Park Friends seeks donations to develop a large project, a special campaign is held. The organization

Each target market has different interests and concerns.

attracts attention to the project through the organization's already established, ongoing media program. People are asked to mail in contributions. The names of contributors are listed periodically in the media throughout the campaign to provide a recognition incentive.

Contributions obtained through the mail, however, are generally small, usually coming in \$5 or \$10 units. Again, substantial donations come from personal contacts. Before the start of a campaign, a large giver is identified. His or her contribution is used as a promotional tool. The announcement of an initial large donation serves to kickoff the campaign successfully, stir community enthusiasm and create news headlines. Another big contribution is sought and held in reserve for use as a finale to put the campaign "over the top." Ideally, Park Friends tries to identify both the initial and final big givers before the start of the campaign, al-

though sometimes the final donation is not discovered until the campaign is underway.

There are several advantages to approaching a fundraising campaign the Park Friends way. First, it is carefully structured to create excitement in the community. It also fosters a sense of civic pride when the citizens contribute directly to the realization of a common goal. Finally, the initial and final givers receive considerable recognition in the community, for without their contributions the funding goal would never have been reached.

The National Parks Service—A Gifts Catalog Promotion Plan

The National Parks Service (NPS) began to use gifts catalogs in 1983 in an attempt to attract more private resources. The first gifts catalog was for Santa Monica Mountains National Recreation Area. The Santa Monica Mountains catalog aimed at various target markets and solicited gifts ranging from a chain saw and trees, to a computer for storing user and resource data. Within 6 months the catalog had attracted contributions totaling \$250,000. Given the demonstrated success of this pilot effort, similar catalog programs are being developed for more than 35 other National Park areas.

The Santa Monica project used a three-part promotional planning process which was conceived by the NPS Western Region Technical Services Office. The scheme uses a workbook format to: identify target audiences, decide upon a promotional theme, select an appropriate mix of promotion tools, prepare a promotion timetable and assign staff responsibilities.

Every planning process involves choice. The NPS gifts catalog promotion plan provides an overview of available choices at each stage of the promotion planning process. It outlines the available options in a worksheet form, allowing the manager to select options that best suit a particular park area. The workbook is reproduced as Appendix C.

The planning scheme recognizes that a targeted approach is the most effective form of promotion. Identifying your target audience in advance will influence the selection of catalog items, the catalog narrative and the channels used to distribute it. The workbook suggests that corporations, foundations, businesses, select individuals, general park visitors, specific user groups, schools, religious organizations, scouting groups, international tourist groups and service clubs may all be appropriate target audiences. On the first worksheet, the staff at each park area selects the audiences likely to be responsive to their catalog, and explains why each audience was or was not selected.

Each target market has different interests and concerns. The workbook suggests that these concerns are best identified through a survey. If this is not possible, then the staff's experience and intuition have to suffice.

The primary concerns and interests of each target audience are listed on a worksheet. These concerns guide the tailoring of the catalog's contents to appeal to the specific audiences targeted.

Every park has more needs than can be included in one gifts catalog. Accordingly, NPS includes only items that closely relate to the desires of the target audiences. After a list of audience concerns is written, the park's needs list is examined for items which are compatible to it. Those that best relate to audience concerns are included in the gifts catalog. When a rough draft of the needs list is completed, the set of items designated for inclusion in the catalog is scrutinized for deficiencies. If not enough items have been selected to fit the many interests and budgets of the selected target markets, more items from the needs list are added.

The workbook suggests that a gifts catalog theme should relate to the concerns of the target audiences. A good way to generate ideas for a theme is through a contest among staff members. An attention grabbing campaign slogan which reflects the overall theme and a title for the gifts catalog that capitalizes on the concerns of your audience could be developed the same way.

Once target audiences have been identified and a theme selected, the NPS selects the proper mix of promotion tools. Included in this section are exercises to select the best approaches for personal contact, publicity, advertising and special promotions.

The NPS marketing plan recommends that everyone who is expected to contact groups or individuals regarding the gifts catalog should receive training focusing on whom to approach, when to approach them, and how to approach them. A worksheet exercise incorporates these elements. Personal contacts are divided into those made off-site and those made on-site. Off-site meetings can include visits to corporations and businesses, service clubs, professional associations, community action groups, foundations, unions and select individuals. Three different groups may be appropriate for making off-site contacts: the park superintendent, the superintendent and selected staff, or an outside ally (for example, an influential friend) of the park. Several possible modes are suggested for off-site meetings. These are:

- one-on-one meetings specifically arranged to discuss the gifts catalog;
- one-on-one meetings where the gifts catalog is a secondary topic;
- group presentations where the focus is on presenting the catalog;
- group presentations with the gifts catalog as a secondary topic.

Groups who can be personally approached on-site include park visitors, program participants and park residents. Either the supervisory staff or the entire staff can be given the responsibility for making on-site contacts. Approaches relating to the catalog can be made within the park after interpretive programs or any other time the opportunity presents itself.

The worksheet concerning personal contact concludes with an exercise in which each target audience is matched with a unique appeal. The nature of the appeal will depend on what has been identified as the key concern of each target group. For instance, the Santa Monica Mountains catalog relates to business firms by referring to contributions as "Returns on Your Investment." It suggests tax advantages, publicity and assisting in the creating of a better place to live as reasons for "investment."

After a course of action has been outlined for personal contacts, a publicity strategy is designed. The heart of the publicity plan is the development of a media contact list which focuses on the most effective avenues of reaching your audiences. Options for sources at Santa Monica Mountains included: neighborhood, city, regional and national newspapers; regional, national and organization-based magazines; the wire services; newsletters; and television, at both the local and regional levels.

The Santa Monica gifts catalog was greeted with a tremendous amount of media attention. A feature article appeared in the *Los Angeles Times* the day before Thanksgiving, well before the catalog hit the streets. The *Times* article was picked up by more than 80 newspapers nationwide. The gifts catalog was featured on national television on CBS Evening News and Cable News Network. Each of the items mentioned in the article was offered as a donation to the park as a result of this publicity.

Designing an advertising strategy is the next element

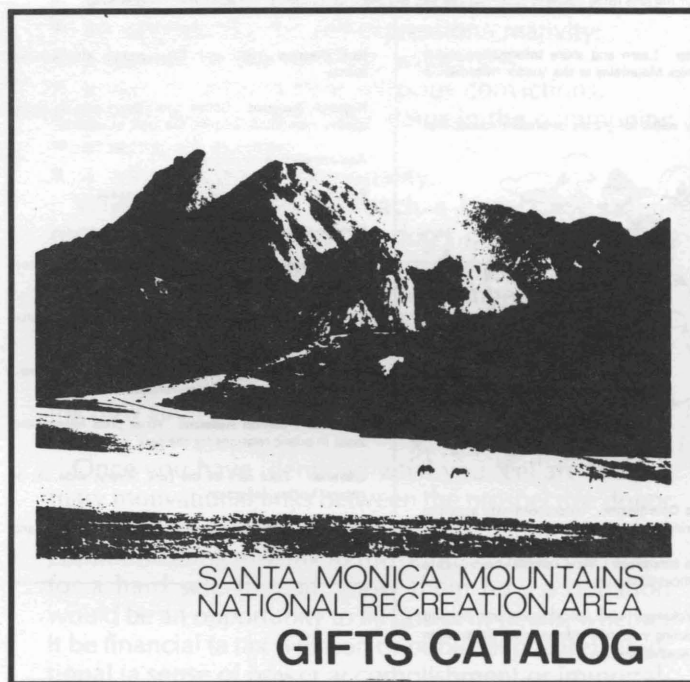


Figure 5. The first gifts catalog the National Parks Service developed was for Santa Monica Mountains National Recreation Area.

of the promotional mix. Unlike publicity, advertising generally costs money. However, some methods of advertising such as public service announcements are free. Pursue free outlets for advertising. A high enough level of awareness concerning the gifts catalog may be created without having to pay for space or time.

The list of possible off-site advertising options includes: newspapers, newsletters, magazines, shopping guides, outdoor equipment catalogs, school newspapers, television, radio, posters, banners, leaflets and direct mail. On-site advertising can be tastefully carried out by placing sign boards or posters at key park attractions such as museums, visitor centers, campgrounds, overlooks and concession facilities. Use only the media that most efficiently bring the gifts catalog to the attention of target audiences.

The NPS sees great potential in two types of special promotions—press events and contests. Special events make people aware of the gifts catalog. A kick off event signaling the beginning of the catalog promotional campaign is likely to attract more media attention than a press release. Follow-up press events throughout the campaign keep enthusiasm high. These midcourse events can be held either to recognize contributors or to solicit new donations. Picnics, banquets, champagne receptions, and behind-the-scenes tours can all be effective.

Inject a little excitement into the campaign by using

contests. Corporations, service clubs and communities can compete to see who contributes the most to the gifts catalog program. This also offers an additional source of interesting material to report to media sources during a campaign.

Once target audiences have been identified, a theme has been chosen and an appropriate promotional mix has been devised, assign responsibility and set target dates for completing each step in the catalog's development. One person should oversee the process. He or she discusses and agrees on objectives and completion target dates with each project staff member. An entry of what is to be accomplished, when and by whom is recorded into the promotional timetable. Use of a promotional timetable or calendar imparts urgency into the planning process. It also builds in accountability by serving as a written record of each project member's responsibilities and accomplishments.

Stimulating gifts catalog giving is a highly personalized process. Success requires more than just pulling together a list of your needs and mailing it to everyone in town. An effective gifts catalog program requires the identification of appropriate target audiences, understanding the benefits they seek from making a contribution, selection from a set of your needs items which are tailored to mirror their desires, and a promotions mix designed to make them aware of the gifts catalog program.

LEND A HAND

Opportunities exist for volunteers in virtually every aspect of park operations. If you would like to volunteer for one of the jobs listed below or anything else you can think of, call Marti Leicester at (213) 888-3440.

Park Interpreter Learn and share information about the Santa Monica Mountains at the Visitor Information Center

Lead discovery walks for groups or present educational programs



Special Events Coordinator Help coordinate activities before and during special events

Sign Language Interpreter Help rangers communicate with hearing-impaired visitors

Equestrian Volunteer your information and first-aid skills by scheduling your trail ride to cover times when visitors might need assistance

Radio Dispatcher Help out on weekends to relay messages to rangers in the field

Trail Builder Construct and maintain trails

Park Cleanup Help with litter pickup after special events

Research Assistant Gather and analyze data on water quality, vegetation, wildlife, fire fuels, or weather

Analyze wildlife corridors

Participate in annual nesting raptor surveys

Monitor air quality

Photographer Photograph resources and their condition

Cartographer Produce maps for planning and visitor information

Clerk-Typist Keep mailing lists up-to-date and mail out announcements and press releases

Public Information Assistant Write press releases and assist in public relations for the park

Librarian Take care of the park library, slide file, or natural history collection

Writers and Illustrators Prepare park brochures and other publications

RETURNS ON YOUR INVESTMENT

A BETTER PLACE TO LIVE

As southern California continues to grow and increase in cultural diversity, the need for parklands — where people can enjoy the out-of-doors and renew their awareness of their natural and cultural heritage — will become more and more critical. Your support of Santa Monica Mountains National Recreation Area will help to improve the quality of life that we enjoy today and ensure that it is passed on for future generations.

PUBLICITY

We will gladly recognize the generosity of your corporation, small business, service organization, or foundation through news releases, publicity photos, dedication ceremonies, certificates, plaques, or other appropriate media. Or if you prefer, your request for anonymity will be honored.

TAX ADVANTAGES

All donations (other than personal services) are tax deductible charitable contributions. A new federal tax law even allows charitable gift deductions for those who don't itemize. You will receive a letter of appreciation, acknowledging your gift and its value, which can be used for income tax purposes.

YOUR GIFT WILL BE USED, IN A PROMPT AND COST-EFFECTIVE MANNER, FOR THE PURPOSES YOU HAVE REQUESTED

All donations will be recognized by a letter from the National Park Service. In addition

For gifts valued at \$100 to \$1,000, you will receive a framed color photograph of the Santa Monica Mountains.

For gifts valued at \$1,000 to \$5,000, you will receive a plaque with a certificate of recognition from the National Park Service.

For gifts valued over \$5,000, you will receive a plaque and an oak tree will be planted in the mountains in your name.

The first 100 donors of gifts valued over \$500 will be specially recognized on a First 100 Patrons board, which will be prominently displayed at the park headquarters.

Figure 6. Inside the Santa Monica Mountains' gifts catalog.

APPENDICES

Appendix A Arranging a Personal Follow-up Meeting

It would be nice if all of your needs were quickly filled by people who received your gifts catalog or heard about it because of the publicity you generated. Unfortunately, many prospects need a little more encouragement before they make their gift. Ideally, you should arrange a follow-up meeting with every targeted prospect.

If the large size of your target list or the small size of your staff makes this impractical, set up meetings with your most likely prospects. Follow up the remainder with phone calls or letters asking if they have received your catalog and providing them with a name and telephone number to call if they have any questions.

Decide Who Will Attend the Meetings

One option is to form an ad hoc group of influential civic leaders and corporate executives willing to approach their peers with your gifts catalog. They could either handle the solicitations themselves or team up with a member of your staff. This option is highly preferred if the right group of leaders is available and willing.

If not, your staff can also do an excellent job in these follow up meetings. Familiarity with agency needs, belief in the worth of the projects, and energy and enthusiasm can go a long way toward assuring a successful meeting.

A two-person team seems to be ideal. It conveys to the potential donor that you feel the meeting is important, and in addition, two people can often catch verbal and nonverbal cues from the prospective donor that are missed by one person working alone. This can be extremely valuable in steering the conversation in the most productive direction.

Decide How You Will Set Up the Meetings

Perhaps the best way is to ask an ally to set up the meeting—someone who has made a donation through the gifts catalog and is known and respected by the prospective donor. This "endorsement" can often open the prospect's mind to the idea of making a donation. If this is not possible, agency staff can telephone to set up the meeting. One way to smooth the way for your phone call is to send an introductory letter indicating that someone will be calling to arrange a meeting.

Whichever option you choose, call the day before the meeting to confirm the time and place.

Preparing for the Meeting

There is an old adage in the field of marketing: "To sell Jack Jones what Jack Jones buys, you have to see Jack Jones through Jack Jones' eyes."

To sell prospective donors on the idea of your gifts catalog, you must understand what might motivate them to give.

Some of the obvious motivators are:

- tax advantages;
 - good public exposure (public relations/advertising value);
 - benefit to the community; and
 - to honor a friend or relative with a gift or memorial.
- Some of the hidden persuaders are:
- a reassurance of worth/ego gratification;
 - an opportunity for self-expression/creativity;
 - a love of nature, wildlife, wilderness;
 - a way to express their religious convictions;
 - a means to attain greater status in the community;
 - a sense of power;
 - a way to achieve immortality.

When planning to approach a large corporation, recognize that corporations don't give—they invest! Corporate executives must answer to stockholders whose primary concern is the corporation's profitability. Therefore, you must first sell the corporation's representative on the tax benefits or public relations value of a gift to your agency. Only then can you begin addressing how such a gift might relate to their personal motivations.

Once you have identified what you feel are the primary motivational links between the prospective donor and the gifts catalog, design a presentation aimed at communicating this link to the donor. There is no need for a hard sell. Instead, show them how a donation would be an opportunity to fill one of its needs, whether it be financial (a tax write-off or public exposure), emotional (a sense of power accomplishment or immortality), or both.

In designing your presentation, don't plan on emphasizing the details and specifications of items that could be donated. This important background information

should be available upon request, but it will not prompt a prospective donor to seriously consider your proposal. Instead, stress the benefits that would result if they were to make a donation. Who would be directly helped? What impact would this have on the agency's resources? What is unique about this giving opportunity? How would their generosity be publicized? Would their donation be tax deductible? Sell the sizzle—not the steak.

Prepare a Giving Portfolio

Prepare a giving portfolio for each meeting. Custom-tailor it to zero in on each prospect's motivations for giving. This does not mean starting from scratch in preparing for each meeting. It means preparing certain individualized materials to supplement the standard components of your giving portfolio. Following are some hints for what you might include in your giving portfolios:

Standard components—

- a folder with a logo on the outside and pockets on the inside,
- a copy of the gifts catalog,
- a copy of the complete needs list for your agency,
- a copy of your park brochure,
- gift selection forms,
- an envelope, preaddressed to the agency;

Individualized components—

- a personally addressed, standard letter from the director,
- the names and phone numbers of those representing your agency at the meeting,
- a specialized needs list containing items you think might be of special interest to the prospective donor.

A specialized needs list can be as simple as a listing of a few of the items and descriptions found in the complete agency needs list (a word processing unit makes this a snap), or it can be as extensive as a series of full-page detailed descriptions, complete with illustrations or photographs.

The most obvious consideration in selecting items for a custom-tailored list of needs is to select items of special interest to the prospective donor. But it is also important to select items which match the donor's financial capabilities. If you are not sure of its financial status, aim high. Managers will let you know if the items are beyond their means, and you can then present additional opportunities. However, if you underestimate a company's potential, you may miss a golden opportunity for a large contribution.

Consider Using Audiovisual Aids

You may want to prepare some audiovisual aids for your presentations, but don't overdo it. Plans or drawings detailing a couple of projects you feel may appeal to the donor may be all you need. Your potential donor may be busy, and sitting through a 20-minute multimedia extravaganza might be counterproductive. However, slide shows or flip charts may be extremely ef-

fective in making presentations to large groups such as service clubs or other community groups.

Rehearse Your Presentation

Rehearse your presentation, anticipating the kinds of roadblocks the donor might bring up. Prepare questions in advance. Asking questions has many advantages. It forces the prospect to get involved with what you're saying. It alerts you to how well they are listening and whether they are understanding what you're saying. And it gives you an opportunity to find out more about their feelings and to identify possible motivations for donating. It will undoubtedly be a lot easier to conjure up revealing questions before the meeting than in the midst of it. Try role playing, keeping in mind the following tips:

- Don't fear failure;
- Don't be intimidated;
- Don't be intimidating;
- Don't misrepresent;
- Don't overstate your case;
- Avoid information overload;
- Use stories and anecdotes;
- Actively listen;
- Don't get deadlocked;
- Don't get sidetracked;
- Be flexible;
- Respect philosophies;
- Maintain a positive attitude;
- Know your limits and be clear about them;
- Solve problems, don't issue demands;
- Interpret nonverbal signals and watch your own;
- Don't avoid hard subjects such as death;
- Act as a counselor, not a salesperson (show them how they can meet *their* needs by making a donation);
- Remember you're dealing with a fellow human being. Relax!

In dealing with objections:

- Never argue;
- Respond with facts;
- Avoid inflating the objection (if it's weak, try to ignore it);
- Show respect for honest objections;
- Find some common ground ("I know what you mean, I agree");
- Turn the objection into a reason for giving ("Actually, this is exactly why this gift item is needed so badly.");
- Handle it as a positive addition to the dialogue ("I'm glad you brought that up");
- Remember, the prospective donor is always right.

In asking for the donation:

- Offer options of how to give, not whether to give ("Would you be interested in making a cash gift or the item itself?");
- Ask for more than you expect, and be prepared to negotiate downward;
- Don't just ask for money—also ask for volunteer time, names of other donor prospects, a commitment

to solicit for you;

- Once you ask for the gift, *be silent!*

At the Meeting

Arrive for your meeting 5 minutes early. Take special care to get off on the right foot. The opening will set the tone for the meeting and in many cases will determine its success or failure.

The key to a successful opening is to involve the prospect in your meeting. Rather than talking *to* the prospective donors, strive to enter into a dialogue *with* them. Smile and be warm, friendly and open. This breaks down barriers like nothing else can. Let the prospect relate to you as a person. People give to people.

Compliment them on their accomplishments and other assistance they've provided to the agency or the community. Be specific and sincere. Note reflections of the potential donor's personal tastes and interests by looking around the office at certificates, artwork, awards and any other clues. Express appreciation for the appointment and allow the potential donor to initiate the conversation and to ask the first questions. Many prospective donors prefer that you come quickly to the point of your visit. Avoid information overload by presenting your request for assistance concisely.

Allow interruptions for questions and comments. Actively listen and watch their nonverbal cues. Don't use agency buzzwords with which the donor may not be familiar. Maintain a positive attitude but avoid overstating or misrepresenting your case, avoid sidetracking and debating controversial issues, and don't come across as issuing demands. Maintain flexibility. The donor may have ideas of how the meeting should proceed. Watch the time and don't overstay your appointment.

When asking for the gift, summarize the important reasons for giving, stressing those that the prospect reacted positively toward during the meeting. *Always ask for the gift.* Never assume your prospects will reach for their checkbooks without prompting. Believe it or not, the main reason face-to-face solicitations fail is that solicitors don't ask for the donation.

After asking for the gift, *be quiet.* Silence compels the prospect to answer your request, while any additional statement on your part only provides something other than your direct request to respond to.

Finally, when you've received the commitment of a donation, congratulate your new donors on their important decision. They want support. Give it to them. Then end the solicitation as quickly and diplomatically as you can. You certainly don't want to open any discussion that might cause them to reconsider their donation.

Successful or not, thank them for their time. Exit, and then relax—you've made it.

Follow-Up

Okay, enough relaxing. You've got important work to do!

Send each person with whom you meet a "thank-

you" note, whether he or she has decided to contribute or not. Send it the day of the meeting or the following day at the latest.

Analyze the meeting. What can you do better next time, and what seemed to work particularly well? If it concluded without any final donation, decide if there is any further action that would increase your chance of success. Would a phone call from a business associate or a civic leader help? Is there additional information you could send? Don't let the matter linger unresolved. Strike while the iron is hot. If you don't hear from them, call and find out if they have any unresolved concerns that you might address.

If your request for a donation is turned down, make a note as to whether you feel these prospects might give in the future. Unless they were adamant about never wanting to give to your agency, it may be worth approaching them again in a future fundraising campaign.

Perhaps your most important single action in providing adequate follow-up is to spend the donation expeditiously once you receive it. This demonstrates to the donors that the item was needed and that your agency is an efficient organization worthy of their gift.

Recognition

You have promised certain types of recognition in your gifts catalog, and these obviously require prompt follow-through. But don't feel that this is as far as you should go in making the donor feel needed and appreciated. A little special attention could mean another donation in the future.

Ask large donors what types of supplementary recognition they would like in terms of ceremonies and press coverage. Send them a progress report sometime during the first 6 months after the donation, outlining the positive impact their donation is having and will have on agency operations.

Consider starting a card file of your largest donors. Periodically, send each a letter informing him or her of agency developments that you feel would be of interest. It takes a little time to show them you care, but the dividends in future gifts will make it all worthwhile.

One cautionary note: the fact that someone makes a donation does not give their suggestions on how the agency should be managed any more weight than anyone else's. Nothing should be said or done to give the donor or the public the impression that the donor has special influence.

A Final Word

Good luck, and remember: success in asking for donations doesn't mean succeeding every time. Don't be discouraged when someone turns you down. Even star baseball players are successful only about three out of ten trips to the plate. When that first donation rolls in, enabling you to do something important in your agency that never would have been possible without outside support, you'll know it was worth the effort. Your turndowns will suddenly pale in significance.

Appendix Bi

The Corporate Contact Strategy Developed by the City of Anaheim Parks, Recreation and Community Services Department

Corporate Contact Office

Purpose

This office assists the Department of Parks, Recreation and Community Services in initiating corporate contacts to solicit funds which will offset the burden of costs of operations and programs in the City of Anaheim's general fund and to generate donations of services, manpower and materials to supplement existing levels of services.

Objectives

1. To initiate a 5-year plan to encourage large corporations and service organizations to "adopt a park" or subsidize a program, such as the Therapeutic Recreation Center, on a continuing basis.
2. To secure the corporate contacts for annual programs, such as the Volunteer Recognition Program, Therapeutic Golf Tournament, and Walkathon to raise money for the Senior Day Care.
3. To generate approximately \$100,000 of gifts to the department programs through the community by donations of services, manpower, materials and supplies.

Methods

The Corporate Contact Office will be located in the offices of the Anaheim Parks, Recreation and Community Services Department. The office will be managed and supervised by the Corporate Contact Program Coordinator. The resources and records of the office will be available to department staff and volunteers. The information compiled will be utilized only on behalf

of department sponsored programs.

The office will be staffed by volunteers and high school CETA workers between 8 a.m. and 5 p.m. Monday through Friday. The program coordinator will be responsible for the scheduling and training of all staff utilizing the corporate office.

The corporate contact program coordinator will recruit volunteers to assist on the corporate contact strategies developed by department staff. The allocation of time and resources by the Corporate Contact Office must be approved by the Recreation Services Manager responsible.

The priorities for corporate contacts will be approved by the director of parks, recreation and community services for each year.

Roles of Staff

Director/Superintendents

Contacts valued at \$5,000 or more with the potential for continuous funding will be made by members of executive staff.

Contact Full-Time Staff/Corporate Program Coordinator

Donations of \$1,000 or more will be negotiated by full-time staff on behalf of their programs. The corporate contact office should be informed of these negotiations. Copies of correspondence and a final action sheet (if more than one contact is made) must be given to the corporate contact program coordinator.

Corporate Contact Personnel

The recreation services manager responsible for the corporate contact program and the program coordinator will provide direct staff support to the first priority funding projects for the department. A specific number of work hours will be designated for all programs which are first priority. The corporate contact program coordinator will supervise the corporate contact office and ensure all information and resources are maintained and updated for use by department staff and volunteers.

The program coordinator will train all staff and volunteers regarding the proper procedure to follow when making business contacts.

Volunteers/Part-Time Staff

Assist full-time staff in making phone and personal contacts. Once trained, the volunteers and part-time staff may make phone solicitations and personal contacts without a full-time staff member present, for donations of less than \$1,000.

Organization of the Corporate Contact Office

The corporate contact program coordinator is organizing the files, logs, mailing lists and reference information so that other department staff and volunteers may use these resources for their programs or projects when contacting businesses. To assist you in utilizing this information, the following listing of information has been prepared:

- 1. Master Log of Business Contacts**—A contact sheet has been developed listing the name of companies, addresses, phone and contact person. This log is updated each time the business makes a major contribution or gives us significant information regarding the company.
- 2. Mailing Lists of Industries**—These lists are being updated each time a particular industry is contacted. For

example: food, printing, unions, and so forth.

3. Log of Donations—Donations from 1979 to the present are listed in this log. The notebook contains letters for the current fiscal year, documenting these donations.

4. Corporate Strategy Notebooks—The Volunteer Recognition Banquet, Therapeutic Recreation Golf Tournament, Wheelchair Basketball Game, and Celebrity Basketball Game Notebooks, have specific information on business contacts, correspondence samples, promotion, and a completed final action sheet to be used by volunteers and staff as a reference for future programs.

5. Reference Library—We are selectively compiling information on current business directories, foundations, gift books, sample promotional information, grants and so forth. We are establishing files on key businesses such as Pacific Telephone®, Carl Karchers® and so forth. Our reference library will be specific to our department and not duplicate the resources in the Anaheim Room of the Anaheim Central Library. For this reason, our resources are to be used only for department sponsored programs. Community groups and other agencies are to be referred to the Anaheim Library, Chamber of Commerce, and so forth.

6. Samples of Corporate Strategy Portfolios—Portfolios are completed on the volunteer program, Anaheim Public Information, Inc. and the corporate program. The information in these portfolios is sold through the corporate office for \$10 each.

7. Forms—Contact sheets, final action sheets, "Anaheim Life. Be In It." folders, certificate and photo folders are available to all staff making business contacts.

8. A listing of businesses not to be contacted.

CORPORATE CONTACT PRIORITIES—1983-1984

Project (Type of donation and months contacts made)	Priority	Target Amount	Corporate Office Responsibilities	Department Staff Responsibilities
Anything-Goes-ATHON— in-kind donations, financial contributions to seniors (Aug.-Oct. 83).	1	\$20,000	Assisting in developing new strategy (research, calls, corresp.) Corporate-120 hrs Recreation Services. Manager.-24. Train and supervise volunteers.	Jan Kleeman to organize and implement program. Businesses and community organizations to be involved.
Senior Day Care Center— Major financial donations	1	\$10,000	Assist in developing strategy for pursuing donations of \$300 scholarships and grants. Corporate Coordinator-hrs. Recreation Services Manager.	Jan Kleeman to organize and implement.
Foundation memberships	1			Chris Jarvi
Youth in Govt. Day Sponsorship—In-kind and financial (Jan.-Apr. 84).		\$5,000	Provide training and resources to staff and volunteers as requested.	Youth commissioners to make most contacts. Prepare correspondence/portfolio.
Teen Center Openings— Sponsorship, membership sales. (Contacts made Nov. 1983 to June 1984.)		\$10,000	Same as before.	Teen center staff to make most of the contacts, prepare correspondence and promotional info. Contact industries benefiting from youth market.
Anaheim Softball Classic—Jan. 1984. (Contacts made between Oct.-Jan. 1984.)		\$2,000	Same as before.	Dave Sommers to contact Lamp Post Pizza, Boegie Sporting Goods, Cowboy, and Crackers for donations of T-shirts, etc.
Saturday Lunch Program, West Anaheim Senior Center.	4	\$4,000	Same as before.	Lynn Smith and her volunteers are making ongoing contacts for program.
Dept. slogan/logo—in-kind service.	1	\$2,000	Prepare letter follow-up calls and visits to public relations/marketing. Corp. Coord. 5 hrs./week for 1 mo.—(4 wks.)=20 hrs. total. Rec. Serv. Mgr. 1 hr. a week=4 hrs.	Tim Barry to assist with portfolio and follow-up meetings with companies.
Volunteer Recognition Banquet—Financial donations, in-kind products and services.	1	\$15,000	Prepare letters, follow-up calls and visits to misc. industries. Corp. Coord. 10 hrs a week for 3 mos.=24.	Teen, co-rec and volunteer svcs. section to organize and implement program.
Therapeutic Recreation Golf Tournament	1	\$4,000	Assist with new contacts and mail portfolios. Advise about corporate strategy Corp. Coord. 2 hrs/wk for 3 mos.=24 hrs.	Mary Lou Simas will prepare all correspondence, follow-up on past contacts, coordinate and implement program.

Appendix Bii
SAMPLE CONTACT LOG SHEET

Mailing Label

Name: ABC INSURANCE COMPANY

Phone Number: _____ Name: _____ Address: 17570 Giving Way

Phone Number: _____ Name: _____ Fountain Valley, CA 92708

Phone Number: _____ Name: _____ Contact Person: Mr. Joe Smith

Phone Number: _____ Name: _____ Title: Chairman of Contributions

Phone Number: _____ Name: _____ Phone: 967-1122

Type of Company: Insurance Company

(Describe food, service provided): _____

Type of assistance they like to give or reasons why they do not:

Contributions committee is established in each division.

It looks over proposals and decides whom to give money to.

Very strict solicitation policy for participation by employees.

It is almost a blanket no.

Contact Log

Date	Who Called	Reasons	Comments, why called, response, followup needed, etc.
8/22/83	M.K.	Volunteer Banquet	Send a proposal and they'll see what they can do.
9/28/83		Volunteer Banquet	Received letter stating their desire to get involved, and they sent \$150.00 to support this effort.

Appendix Biii
**EXAMPLE OF A WRITTEN EVALUATION
 OF A CORPORATE CONTRACT EFFORT**
The Project

Each major project for which the Anaheim Department solicits gifts is evaluated. This example relates to its Volunteer Recognition Banquet. The Anaheim Department has developed a sophisticated and extensive volunteer program. Each year all individuals and businesses who have participated in the program are invited to a Volunteer Recognition Banquet. More than 700 volunteers and community leaders attend.

The banquet is held only if \$15,000 is solicited in in-kind donations or monetary support. To solicit these gifts, the department developed a portfolio which included a solicitation letter, a description of the event and a copy of the previous year's program from the recognition banquet. If an individual or business expressed interest during an initial telephone contact, then the department sent a portfolio to try to translate that interest into a donation. In this Appendix, a sample solicitation letter is reproduced, together with an overall evaluation of the solicitation effort and examples of evaluations of the responsiveness of various industries who were approached.

**Overall Evaluation of the Corporate Contact Effort for
 the Volunteer Recognition Banquet**

Program or Event: Volunteer Banquet				Date of Event: April 28, 1983
Total Calls Made	Total Time Spent on Calls	Total Letters Sent	Total Companies Donating	Estimated \$ Value of Donations
250	120 hrs.	185 (20 portfolios)	33	\$14,544

General Comments:

Overall, the corporate strategy for this event achieved all its planned objectives. We doubled the financial donations for this program. Prior sponsors for the past 2 years increased their support. Many new industries such as fruit, fabric, airlines, doctors, lawyers and mortuaries were pursued. We experimented with new methods of solicitation such as the use of the portfolio, return postcards for sponsors to indicate their financial donation, varied the style of correspondence, and increased our use of volunteers to assist in solicitations.

The cause of volunteer recognition in the City of Anaheim surged because of the emphasis President Reagan placed on volunteerism. The response of businesses for this cause was as follows:

Hotels—Overall poor response. Disneyland Hotel® always helps in some way. Hilton® helped on parking. Excellent potential from these two hotels for next year.

Printing—Outstanding response from Pacific Telephone®, Northrop®, Hughes® and Phillips Printing®. The printed banquet program and invitations should be negotiated early with these companies for 1984 banquet.

Food—The biggest in-kind donation was the discount on dinners by the Anaheim Convention Center. We need to negotiate early for dinners for 1984 to remain at \$10 and confirm Anaheim Room.

Product industries were good for in-kind donations of products such as fruit. If we know the menu for next year, items of food should be solicited early. Donations should be large enough to warrant a trip to the produce section of L.A.

Decor—The strategy of utilizing the items received such as fabric, flowers, props for the banquet, department events, and other agency recognition programs gave us more leverage for soliciting large donations. We have a written commitment from the County of Orange Social Services Agency to assist us in solicitation in 1984. The Director of Display from Robinson's Department Store® has committed to plan and design for the 1984 banquet. She will supply materials, tools and staff time to decorate.

Evaluations of the Responsiveness of Each Industry

The overall evaluation is compiled from the responses from each industry sector which was approached. The following examples illustrate some of these specific industry evaluations.

Program/Event: Third Annual Volunteer Recognition Banquet
Date of Event: April 28, 1983

Industry: PRINTING

Number of Calls to Solicit	Number of Letters Following Solicitation	Number of Follow-up Calls Made after Letters	Number of Companies Actually Donating	Percent of Companies Donating after Letters	Estimated Value of Donations
10	6	10	3	30	\$3,250

Comments:

- All large corporations contacted had in-house printing facilities, for example, Pacific Telephone®, TRW®, Hughes®.
- Printing is a donation that really doesn't cost the company anything out of pocket.
- Companies need at least 2 months advance notice and at least 2 weeks time to print. Materials should be as complete as possible when taken to them. These companies are a good resource for design and layout ideas.

Industry: FRUITS

Number of Calls to Solicit	Number of Letters Following Solicitation	Number of Follow-up Calls Made after Letters	Number of Companies Actually Donating	Percent of Companies Donating after Letters	Estimated Value of Donations
12	6	15	6	50	\$1,000

Comments:

Overall, the response by the produce industry was good. E.A. Silzle® donated a half ton of grapefruit and a half ton of oranges; Del Monte Banana Company® donated 25 cases of pineapple. The industry is mostly located in L.A.; pickups were made between 8 a.m. and noon. Detailed coordination of delivery and pickup arrangements are necessary.

Industry: FLORISTS

Number of Calls to Solicit	Number of Letters Following Solicitation	Number of Follow-up Calls Made after Letters	Number of Companies Actually Donating	Percent of Companies Donating after Letters	Estimated Value of Donations
30	15	23	13	15	\$435

Comments:

- Poor timing with poor economic situation and Mother's Day right around the corner. (A handful of florists had gone out of business.)
- 1983 florists' donations were \$500 below 1982 florist donations.

Industry: FABRIC/CLOTH

Number of Calls to Solicit	Number of Letters Following Solicitation	Number of Follow-up Calls Made after Letters	Number of Companies Actually Donating	Percent of Companies Donating after Letters	Estimated Value of Donations
12	4	4	1	25	\$200 Wholesale \$400 Retail

Comments:

Retail fabric stores would not donate even "scrap" yardage. Chain outlets cannot donate from local stores—donations are made from executive offices. These people have standing charities. Wholesalers are most open to solicitation with a lot of advance notice. They will keep us informed of "seconds" that are returned to them and donate them if we call quarterly to determine what they have.

SAMPLE SOLICITATION LETTER

November 15, 1983

Ms. Joanne Smith
Community Services Manager
ABC Information Services
100 Fifth Street
Orange, California 92667

Dear Ms. Smith:

Enclosed you will find documentation of a community volunteer program which has won national awards, *your* community volunteer program!

For the past 3 years we have invited local businesses to join us in recognizing the contributions volunteered by individuals and groups which enhance the environment of our community. We are now planning our 1984 Volunteer Recognition Program and would like to offer you the opportunity to join us as a major sponsor. The following are a variety of ways you may wish to invest in the promotion of community volunteerism in Anaheim:

Assist with the production of a multimedia show: "Anaheim Life. Be In It," promoting some creative new ways to become involved in our community. This show will be premiered at the April 28, 1984 banquet before 700 volunteers and community leaders, and will be shown for the next 2 years throughout the city and state. Your company would receive a great deal of visibility in this production. We need in-kind donations and sponsorship to prepare the title slides, program and to produce the show. Our previous production, "Volunteers In Action In Anaheim," is available for your review as an example.

Financial assistance is needed to offset the cost of the Volunteer Recognition Banquet. As of this date, we have raised approximately \$3,000 toward the cost of the meals for the 700 volunteers. We need an additional \$1,000. The Anaheim Convention Center will provide an Hawaiian buffet at cost, in support of volunteerism in Anaheim. All sponsors will be acknowledged by the table signs at the banquet, in the official program, in media releases, and in our recreation program brochure which is mailed to every residence in Anaheim. Attached for your review is a copy of last year's program.

In-kind donations are needed to print the recognition banquet programs, invitations and tickets. Last year, this service was provided by Pacific Telephone. We wish to continue to improve our banquet program by including pictures of the volunteers in action and written descriptions of the types of services they perform. We have also written to President Reagan requesting a letter of recognition in support of our Volunteer Program which we anticipate having reproduced in the program. Attached you will find a copy of this letter. This program will be used throughout the year to promote and publicize our community volunteer program. Your company's contribution would be acknowledged in a special section of the program.

We sincerely appreciate your consideration of our request. If you would like additional information regarding our volunteer program, please contact Marie Dixon or Annette Haynes at 999-5191.

Very truly yours,

Christopher K. Jarvi
Director

Attachment

Target Audience Concerns

Each target audience will differ in its interests and concerns. Ideally, you will have discovered its concerns through a survey. As a practical matter, even without a survey, you can identify at least the major concerns of your target audiences. This will guide you in designing the catalog to appeal to your target audiences.

In the left-hand column below, write the target audiences you have selected. List only the major audiences (for example, corporations), not the subaudiences. In the right-hand column, list what you feel are their major concerns and interests.

Worksheet 2: Target Audience Concerns

Audience	Prime Concerns/Interests
<ul style="list-style-type: none"> • Other business • Service clubs • Professional associations • Community action 	<ul style="list-style-type: none"> • Employee associations
<p>Who should approach them?</p> <ul style="list-style-type: none"> • Park superintendent only • Park superintendent and selected staff • An outside agency (the corporation, association, or organization) selected to promote the gift catalog 	
<p>How and where should the approach be accomplished?</p> <ul style="list-style-type: none"> • One-to-one meetings called for another purpose with the gifts catalog mentioned as a secondary topic • Group presentation specifically arranged to discuss the gifts catalog • Group presentation to individuals in the business community 	
<p>On-Site Options</p> <p>Who should be approached?</p> <ul style="list-style-type: none"> • Corporate park visitors • Program participants • Park residents 	
<p>Who should approach them?</p> <ul style="list-style-type: none"> • Superintendents only • Entire park staff 	
<p>How and where should they be approached?</p> <ul style="list-style-type: none"> • Reply to questionnaire about the gifts catalog • Offer information as the opportunity presents itself • Appeal during training tours • Appeal at the business meeting • Mention gifts catalog to recipients of special use permits 	

Matching Needs and Concerns

Your park has many more needs than can appear in one gifts catalog, so adjust your needs list for the best fit with the interests and concerns of your target audience.

After listing the key concerns of the target audiences, look at the needs list. Asterisk those items which appeal to the concerns of those audiences.

Review the needs list a second time to determine which items could be adapted or combined to interest the target audiences. Make the necessary changes.

Are there gaps in the needs list? Are there enough low-cost items? Too many? Are there enough high priced items? Too many? Enough items to fit the interests and pocketbooks of the target audiences?

Catalog Theme, Slogan and Title

Some gifts catalogs are titled simply *Gifts Catalog*. Others have theme titles, such as *Partners*, *Fun-Raiser*, *Birthday Book*, or *Wish List*. A catchy title makes a gifts catalog more appealing. Regardless, the catalog should have an overall theme which relates to the concerns of your target audience, and to the larger park fundraising theme. If your park unit has not yet developed an aggressive fundraising program, the gifts catalog could provide an opportunity to develop a theme and slogan which you can use in other fundraising efforts as well. Involve as many people as possible in brainstorming. How about a contest among your staff to come up with the best theme, slogan and title?

Worksheet 3: Catalog Theme, Slogan and Title

Select a gifts catalog theme which relates to the concerns of your target audiences and to the larger park fundraising theme.

Examples:

- The park is 25 years old this year, let's spruce it up right!
- You love the park; please help it out!
- Great parks are the result of great partnerships!

Select a catchy campaign slogan that reflects your overall theme and will catch the attention of your target audiences.

Examples:

- “Become an Official Fun-Raiser”
- “Give a Park a Gift”
- “Parks Need Friends Too!”

Select a title for your gifts catalog designed to attract your target audiences.

Part II: Selecting the Proper Mix of Promotion Mechanisms

Personal Contact

The effectiveness of your personal contacts, both off-site and on-site, will depend on the amount of effort expended in preparing for these contacts and in deciding: (a) who should be approached, (b) who should approach these contacts, and (c) how and where. Everyone who is expected to contact the public regarding the gifts catalog (secretaries, staff, superintendent, cooperating association personnel, regional office staff) should receive some training or instruction as to whom to approach, when to approach them, and how to approach them.

Off-Site Options

Who should be approached?

- Corporations
- Other businesses
- Service clubs
- Professional associations
- Community action groups
- Foundations
- Employee associations
- Unions
- Individuals

Who should approach them?

- Park superintendent only.
- Park superintendent and selected staff.
- An outside ally (the cooperating association, a "friends" organization, or a group of influential individuals specifically selected to promote the gifts catalog).

How and where should the approach be accomplished?

- One-to-one meetings specifically arranged to discuss the gifts catalog.
- One-to-one meetings called for another purpose with the gifts catalog mentioned as a secondary topic.
- Group presentations specifically arranged to discuss the gifts catalog.
- Group presentations with the gifts catalog mentioned as a secondary topic.

On-Site Options

Who should be approached?

- General park visitors.
- Program participants.
- Park residents.

Who should approach them?

- Superintendent only.
- Selected park staff.
- Entire park staff.

How and where should they be approached?

- Reply to questions posed about the gifts catalog.
- Offer information as the opportunity presents itself.
- Appeal during interpretive tours.
- Appeal at the conclusion of interpretive programs.
- Mention gifts catalog to recipients of special use permits.

Worksheet 4: Personal Contact

Off-Site

List below in the left-hand column those target audiences who should be personally contacted off-site. In the center column indicate who should do the contacting, and in the right column indicate what forum(s) should be used for the contact.

<u>Audience</u>	<u>Who should contact?</u>	<u>How should the contact be made?</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

On-Site

List target audiences, who should do the contacting and how the contact should take place.

<u>Audiences</u>	<u>Who should contact?</u>	<u>How should the contact be made?</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Nature of Appeal

Your personal contacts regarding the gifts catalog should present a main theme that appeals to the concerns of your target audiences.

List below in the left-hand column the target audiences for your personal contact (on-site and off-site) and indicate in the right-hand column the nature of the appeal. (for example, corporation—tax benefits recognition)

<u>Audience</u>	<u>Nature of Appeal</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Publicity

Publicity is media communication that can bring your gifts catalog to the attention of the public. The basic steps in attracting publicity for your gifts catalog are to:

- develop a media contact list;
- prepare press releases to send to those contacts on the list;
- follow press releases with personal calls or visits.

Your media contact list can be local, regional or national in scope, and it can include any or all of the following media:

- newspapers
- magazines
- wire services
- television
- radio
- newsletters

Worksheet 5: Publicity

Consider your target audiences. Where and how do they get their information? Focus your attempts to get publicity toward the media which reach your target audiences best.

Check below the publicity sources you will focus on:

_____ Newspapers

_____ Neighborhood

_____ City

_____ Regional

_____ National (*Wall Street Journal, New York Times, Washington Post, Christian Science Monitor*)

_____ Magazines

_____ City or Regional

_____ National

_____ Organizations (for example, *Sierra Club Sierra*)

_____ Wire Services

_____ Television

_____ Local commercial

_____ Regional commercial

_____ Local public

_____ Regional public

_____ Newsletters

_____ Organizations

_____ Parks

Advertising

Advertising is media communication in which the sponsor is identified. Unlike publicity, a fee is charged for advertising, although it is sometimes waived such as in the case of public service announcements. Ideally, you will be able to spread the word about your gifts catalog without having to pay for advertising space or time.

Off-Site Options

- newspapers (local, regional, national)
- newsletters (including your own park newsletter)
- magazines
- shopping guides
- outdoor equipment catalogs
- sporting events programs
- school newspapers
- television
- radio
- transit signs (both inside and outside)
- posters and banners
- theater screens
- leaflets
- direct mail (The nonprofit status of your cooperating association or "friends" organization enables it to mail at a considerably less expensive bulk mailing rate than the park. Another postage-saving option is to ask utilities to include your flyer when they mail out their bills.)

Displays, sign boards or posters could be tastefully placed in the following locations:

- visitor centers
- museums
- campgrounds
- overlooks
- other key park attractions
- concessioner facilities

Worksheet 6: Advertising

Again, consider where you can advertise to bring your gifts catalog to the attention of your target audiences.

Off-site

- Newspapers
 - Local
 - Regional
 - National
- Newsletters
 - Other organizations'
 - Your park
- Magazines
 - City
 - State
 - Airline
 - National
- Shopping guides
- Outdoor equipment catalogs
- Sporting events programs
- School newspapers
- Television
 - Local commercial
 - Regional commercial
 - Public
 - Cable
- Radio
 - Local commercial
 - Local public
 - Regional commercial
 - Regional public
 - National
- Transit
- Outdoor advertising
 - Local
 - Regional
 - State
 - National
- Posters and banners
 - In local or regional businesses
 - In public buildings
 - In conjunction with civic events
- Leaflets
 - Available at local businesses, offices, stores
 - Distributed door-to-door
- Direct mail
 - Mailing list of users
 - Local mailing list
 - Regional mailing list
 - State mailing list
 - National mailing list

On-site

Displays, signboards, posters in:

- Visitor centers
- Campgrounds
- Overlooks
- Key park visitor attractions
- Concession facilities

Part III: Preparing a Promotion Calendar

Once you have selected a theme, slogan, title and promotion mix, it is time to assign responsibility and set target dates for the completion of each promotion task. Assign one person to oversee the entire promotion program. Goals should be set jointly by the individuals responsible for each promotion task, the overall coordinator and the park superintendent.

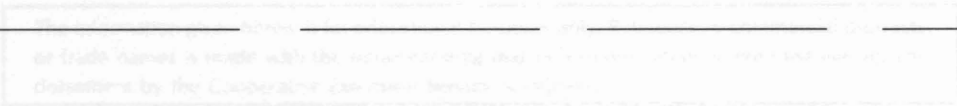
Worksheet 8: Promotion Calendar

Overall Promotion Coordinator: _____

<u>Promotion Task</u>	<u>Goal</u>	<u>Responsible Staff</u>	<u>Target Date</u>
Identify Target Audiences	_____	_____	_____
Identify Target Audience Concerns	_____	_____	_____
Select Theme, Slogan and Title	_____	_____	_____
Select Mix of Promotion Mechanisms	_____	_____	_____
Undertake specific Promotion Strategies	_____	_____	_____

Personal Contact:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



Publicity:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Advertising:

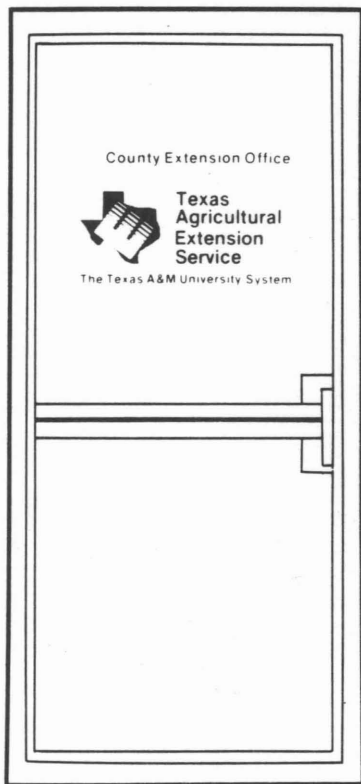
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Special Promotions:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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