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AT BETHEL COLLEGE

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Andrews University

School of Education

**ANALYSIS OF FUND-RAISING ACTIVITIES IN REGARD TO  
ALUMNI GIVING AT BETHEL COLLEGE**

A Dissertation

Presented in Partial Fulfillment  
of the Requirements for the Degree  
Doctor of Education

by

Homer W. Drew

August 1983

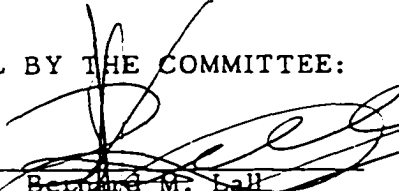
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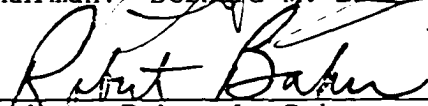
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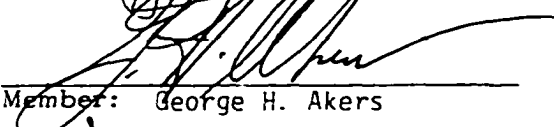
  
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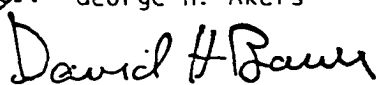
  
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ABSTRACT

ANALYSIS OF FUND-RAISING ACTIVITIES IN REGARD TO  
ALUMNI GIVING AT BETHEL COLLEGE

by

Homer W. Drew

Chairman: Bernard M. Lall



## ABSTRACT OF GRADUATE STUDENT RESEARCH

Doctoral Dissertation

Andrews University

School of Education

Title: ANALYSIS OF FUND-RAISING STRATEGIES IN REGARD TO  
ALUMNI GIVING AT BETHEL COLLEGE

Name of researcher: Homer W. Drew

Name of faculty advisor: Bernard M. Lall, Ph.D.

Date completed: August 1983

### Problem

This study addressed the problem of how small Christian institutions of higher education may best organize and manage their fund-raising programs to maximize alumni support. The purpose of this study was to investigate and analyze what would be the best strategy in working with alumni.

### Method

An experimental design was used with a pre-test/post-test control group. Six different treatments for stimulating alumni giving were studied: "Dear Friend" letter, telethon, personalized letter, gimmick letter, incentive letter, and personal visitation. The study

was limited to Bethel College and included three hundred alumni randomly selected and given one of the six treatments. The results of the study were determined by the use of analysis of covariance with one and two covariants. Further statistical analyses included a-priori tests, histograms, chi-squares, and scatterplots. The analyses included both the actual dollar amounts received from the six treatments as well as the expenses incurred in conducting the treatments.

### Results

The results showed that personal visitation produced the most dollars; however, telethon was the most cost-efficient, followed closely by personal visitation and then by incentive letter, "dear friend" letter, personal letter, and gimmick letter.

### Recommendations

Recommendations based on the study were: (1) that the results of the study be reviewed by the fund raisers of small private colleges and universities and that they implement the most productive methods, personal visitation and telethon, as the primary means of raising funds from alumni; (2) that personal visitation should be the chief method of fund raising among alumni as long as expenses are minimized (this can be accomplished by either cutting the dollar amounts or researching individuals in detail to determine if their gifts will be significant); (3) that since cost analysis proved telethon produced the best results, it should be seriously considered as a means of fund raising; (4) that letter writing as a means of fund raising from alumni be used after personal contact; and (5) that since the incentive letter proved to be the best income producer of the four letters, it should be the preferred

letter used in fund raising (for variety it can be followed respectively by the "Dear Friend" letter, personal letter, and gimmick letter).

## CHAPTER I

### INTRODUCTION

The most important resource of the United States is not its oil, coal, or gold; it is its young people. Due to the rising cost of living, the American educational system is facing a difficult time. Competition for the dollar is dramatically increasing as inflation and the cost of living continue to rise. This financial crisis is having a serious effect on the management of colleges and universities. As overall costs soar 10 percent per year, colleges and universities experience budgets which do not rise sufficiently to offset the financial crisis (Richman & Farmer, 1977, p. 292). Over 1,200 colleges and universities in the United States have already been forced to close, and others continue to be in danger of closing (Lall, 1981, p. 10).

In order to meet this challenge, many institutions of higher education have established Development or Institutional Advancement Departments. These departments are an inescapable necessity for any college or university, and their purpose is to wage a continuous campaign for financial support for their institutions. The basic importance of an Institutional Advancement Program is that it enables a college or university to meet the legitimate financial needs of the institution, to chart its growth, and to anticipate emergencies. The Institutional Advancement Program must reflect these purposes by adapting itself to the educational aims, leadership style, and

constituency of the college or university. Sound programs must be established in the areas of annual giving, deferred giving, capital campaigns, corporate and foundation giving, churches contributions, and alumni giving. All of these fundraising areas are important to the institution.

This study, however, focused on alumni giving, since it holds the key to successful fund raising. It is the alumni who perpetuate the tradition and who possess the greatest concern for a successful operation of their alma mater. Their giving should be constant and should increase as future classes graduate and join the alumni ranks. In 1960, alumni provided \$180 million in support of their colleges and universities. In 1973-74, their giving had increased to \$509 million (Rowland, 1977, p. 276). In 1978-79, alumni raised to \$758 million the total of their contributions to their chosen institutions of higher education (Murray, 1981, p. 12). The years 1979-80 saw alumni giving approximately \$910 million (Magarrell, 1981, p. 91). Then, for the first time in 1980-81, alumni giving surpassed the billion dollar mark with \$1,049 billion (Magarrell, 1982, p. 7). Alumni giving could certainly be the key to the progress of many institutions and even to the survival of others.

#### Statement of the Problem

For centuries, institutions of higher education have been receiving gifts from alumni. Some institutions are highly successful in raising funds from alumni, while others are not. Initial investigation reveals that there is neither a model, a systematic method, nor research in this area of alumni funding. Institutions realize the importance of the alumni gift, yet they have tended to use the "shot-gun approach"

in which they contact alumni by whatever method is available when money is needed, hoping to receive the financial help desired. There is a need to establish a model or systematic program which shows the methods which will accomplish the best desired response. A clear direction to tap this financial resource is necessary if institutions are to utilize alumni to their fullest potential. Henry T. Held, past president of the Ford Foundation, described the importance of alumni in the following manner:

New generations of alumni provide the continuity that perpetuates a university. Its officers come and go, its facilities change, its programs and buildings are replaced, but its alumni maintain a lifelong relationship with the university. They are keepers of the tradition, preferred stockholders of the enterprise, the mark of its accomplishment. (Rowland, 1977, p. 275)

In a time of financial austerity, alumni giving can make a significant contribution to the financial stability of an institution. The problem is to discover the most productive, systematic method of working with alumni.

#### Purpose of the Study

The purpose of the study was to develop a strategy that may be followed to raise funds from the alumni of Bethel College. It was anticipated that this study would also have a wider application in being helpful to all small private colleges in the development of a strong alumni-giving program. Further, this study would be made available to any other college or university which might find it useful as a base to develop similar strategies for its own needs or interests.

#### Experimental Hypothesis

The hypothesis for this study centered around six different treatments, that is, six different methods of contacting alumni to request

support. The major dependent variables were the gift incomes derived from the six different treatments along with the net gift and increase. The six treatments were as follows:

$X_1$  = "Dear Friend" form letter

$X_2$  = telethon

$X_3$  = personalized letter

$X_4$  = gimmick letter

$X_5$  = letter offering incentive gift

$X_6$  = personal visitation

The hypothesis formulated for this study was: Different treatments will differ with respect to the mean income received.

#### Limitations

Any study that deals with human behavior has factors beyond the control of the researcher. Direct mail is at the mercy of the temperament of the receiver on that particular day when the correspondence is opened. Grief in the family or financial stress has an impact on the manner in which the individual responds to direct mail. Likewise, if the individual is in a pleasant state of mind, direct mail will likely be received in a positive manner. The voice contacts of telethon and personal visitation are affected by similar circumstances. The mood or feeling of the individual contacted is a limitation.

#### Delimitations

This study was delimited to the alumni of Bethel College. Bethel is a small, Christian, four-year liberal arts institution of higher learning located in Mishawaka, Indiana.

Another delimitation was the time during which the research

was conducted. The first letters were sent out January 28, 1982; and the last visitation was May 21, 1982. These months in Northern Indiana represent a time of high inflation and high unemployment. Consequently, donations may have been limited by the economic circumstances.

A further delimitation imposed on treatment six, personal visitation, was the use of only four states--Indiana, Michigan, Ohio, and Illinois. This limitation was due to expense and time restrictions. However, it is interesting to note that Bethel College alumni in these four states make up approximately 80 percent of the alumni.

#### Definitions of Terms

Alumni refers to individuals who have attended or graduated from a college or university. Technically, the term alumni is a masculine plural form, while alumnae is feminine plural. To maintain readability, however, alumni is used collectively throughout this study.

Fund raising is used to describe the solicitation of gifts from all sources.

Gimmick is a strategem employed to promote and enhance a project.

Institutional Advancement Office or Development Office refers to that office which is responsible for communications, public relations, fund raising, and alumni relations of an institution of higher education.

#### Significance of the Study

This study was a timely and vital one for the maintenance and growth of institutions of higher learning; for some, it may be a study that can help those institutions survive. There has been a need for



analysis to determine the most productive method of raising funds from alumni for higher education--not only most productive but also the method which allows the most gain when taking into account the cost involved. A review of empirical studies indicated that there was a need to develop a strategy for finding the best method of raising funds from the alumni of an institution. The data generated by this study may help Bethel College and other institutions focus on their most productive and profitable way of working with alumni for the advancement and even the survival of the institution. Although this study was limited to a single, small, church-related liberal arts college, the data would be representative of similar institutions. In addition, public state institutions may profit from this study as they contact their alumni. The findings of this study should provide administrators with some ideas for planning in making their institutions financially strong and ready to meet the new challenges and opportunities of higher education.

#### Organization of the Study

Chapter I provides an introduction to this study. A statement of the problem is presented followed by the purpose. An experimental hypothesis is established with delimitations and definitions, followed by the significance of the study.

Chapter II reviews the literature, focusing on fund raising and especially on alumni giving. Chapter III covers the methodology of the study followed by chapter IV with the analysis of data. Chapter V presents the conclusions of the study with recommendations on what small Christian colleges of higher education can do to help themselves with regard to alumni giving.

## CHAPTER II

### REVIEW OF RELATED LITERATURE

#### Introduction to Fund Raising

Due to the existence of many circumstances, individuals and institutions are often incapable of coping financially by themselves. Consequently, there was developed by others an awareness that needs have to be met by all. As people and companies prospered, they shared with those who were less fortunate than themselves (Knudsen, 1976, p. 12). Fund raising has a foundation based on individuals giving to meet individual or institutional needs because of their love, concern, and compassion. The Bible supports the joy of giving in Acts 20:35: "It is more blessed to give than to receive" (NIV). This is also shown in 2 Cor. 9:7: "Each man should give what he has decided in his heart to give, not reluctantly or under compulsion, for God loves a cheerful giver" (NIV).

Examples of individuals helping others can be seen in a variety of social interactions: to the less fortunate, like widows and orphans; to small service groups; to large organizations; and to institutions of higher learning—one person helps another, hundreds help a dozen, and thousands band together to help people suffering from a single catastrophe (Knudsen, 1976, p. 12). As those in need have expressed their concerns, those with an interest and the means to help have

stepped in to help. Institutions of higher education have become some of the recipients of such concern.

Arthur Schlesinger finds America's fund raising in terms of the nation's heritage of frontier democracy, national plenty, and its emphasis on equality, as evidence of its concern for the underdog (Cutlip, 1965, p. 526). More than three quarters of a century earlier, the perceptive Frenchman, de Tocqueville, observed the following about America:

In no country of the world has the principle of association been more successfully used, or applied to a greater multitude of objects, than in America. Besides the permanent associations which are established by law . . . a vast number of others are formed and maintained by the agency of private individuals. The citizen of the United States is taught from infancy to rely upon his own exertions. (Cutlip, 1965, p. 527)

The trait seen by de Tocqueville years ago is amply verified by Americans answering the needs of the YMCA, community, church, hospital, and institutions of higher education. Merle Curti said:

Perhaps in the magnitude of giving, and certainly in the patterns of philanthropy, that have found expression here, American experience in philanthropy has both expressed American character and at the same time has helped to shape it. (Cutlip, 1965, p. 527)

Through the ages, the basic trait of concern for every man as his brother and the response to suffering and need has been one of the highest attributes of human uniqueness.

Once those at institutions of higher education began tapping the general public for general support, the roots of fund raising were planted. The beginning approaches of "begging mission" and lotteries for fund raising during the colonial times have grown into highly organized systems of fund raising of the modern day.

### Overview of Fund Raising

Today, fund raising is viewed as the solicitation of gifts from all sources. Particular emphasis must be placed on knowing the personalities of the solicitor and the donor. When properly motivated, people respond to the needs of an institution, as presented by a skilled leader, and contribute to whatever the funding needs may be. A successful fund raiser must be an effective leader who knows his audience well. The nucleus of any significant achievement in fund raising is made possible through that genuine leadership which is rare and beyond price (Seymour, 1966, p. 3).

During their time, both Abraham Lincoln and Winston Churchill were great leaders. When leadership is right and genuine, people follow. Both of these men were fine examples--Lincoln during the Civil War and Churchill during World War II. Lincoln's remark, "If you once forfeit the confidence of your fellow citizens, you can never regain their respect or esteem" (Cutlip, 1965, p. 8) is certainly apropos. And it would be well to remember Churchill's assessment of the American public: "Their national psychology is such that the bigger the idea the more wholeheartedly and obstinately do they throw themselves into making it a success" (Seymour, 1966, p. 8). Confidence is a primary attribute of successful leaders and institutions alike. Lack of good leadership and confidence is a sure road to failure in the areas of fund raising (Seymour, 1966, p. 8-9).

Lincoln and Churchill provide great examples of how vital is the role of leadership. It is the role one must fill in order to be successful at fund raising. Selecting the right leader is essential; good leaders are always worth looking and waiting for as they bring

warmth and confidence and attract others to the fund raising program. Some institutions of higher learning can look within their own constituency to find such a leader for their campaign. Others must look outside the institution. Perhaps finding and nurturing such a leader constitutes one of the greatest arts of all.

Once the selection of a leader has been accomplished, a plan or strategy for fund raising is prepared. Adequate planning has top priority. One is reminded of Plato's comment: "The beginning is the most important part of the work" (Seymour, 1966, p. 56). In his book Design for Fund-Raising, Seymour noted that planning takes in the following:

1. Definition and design
  2. Involvement in program
  3. Determination of the cause
  4. Setting of standards.
- (Seymour, 1966, pp. 37-38)

To find the definition, the fund raiser must discover the answers to the following: What is the constituency? Is it a ready-made constituency or does one have to find his own names? What is the time frame from start, through duration, to closing date? Where does one turn for authority, approval, and help? The design purposes to survey many different groups and committees of people and get them involved in the fund-raising endeavor (Seymour, 1966, pp. 38-39).

Involvement is a necessary part and cannot be ignored. In its simplest form, it means asking people to do something for the campaign so they feel part owner in its successes and accomplishments (Seymour, 1966, pp. 40-41).

Determination of the cause specifies the purpose of the fund-raising campaign. Concise information is needed to explain that which

needs to be known. It should answer all important questions, review the data for support, explain the proposed plan, show how gifts may be made, and introduce the people in the leadership role (Seymour, 1966, pp. 42-43).

Standards at every level of giving should also be sought. It is very important to set standards for giving from the inside out and at each level of the campaign. The amount of the dollar alone is never as important as the right gift belonging to the right giver (Seymour, 1966, pp. 50-53).

The many-talented Benjamin Franklin exhibited great creativity as a successful fund raiser. His prepared list of special prospects had a cause specified for each one, and he would then personally call upon each. Franklin's advice was this:

In the first place I advise you to apply to all those whom you know will give something; next, to those whom you are uncertain whether they will give anything or not, and show them the list of those who have given; and lastly, do not neglect those whom you are sure will give nothing, for in some of them you may be mistaken. (Cutlip, 1965, p. 6)

Chester Tucker, Vice-President for Development and Public Relations for the University of Pennsylvania, noted:

Small gifts are important, even essential, because the big prospect is impressed by seeing a wide volume of support . . . Thus it is that a so-called "quiet special gifts campaign" or what you might call a "still hunt" for large gifts, which sounds good in theory, is not really so good in practice. Both the solicitor whom you enlist to work and the substantial prospect whose gift you are trying to get, want to know that many others are working in the interest of the cause and that many others are giving according to their means. Thus both the special gift and the average gift are important to you. More than that, there is no way to determine which of your small givers today will be your institution's major givers twenty years from now. (Seymour, 1966, pp. 127-128)

Throughout the years, those who have been successful in fund raising have demonstrated successful techniques. Seymour

(1966) expresses some of the ideas characteristic of the giving process:

1. Giving begets giving. The best prospects are those who have already given and the more a person gives the more likely he is to give. The best bequests usually come from the steadiest of the annual contributors. The best responses are to those workers who have made their own gifts, best by those workers who have talked themselves into their own responses.

2. Giving is primarily responsive. People seldom give sums without being directly asked to do it. They give because people at their own or higher level ask them to give and usually more thoughtfully when asked with good reasons. The fact is that givers will often give more than they have intended to give when the suggestion of giving comes from a respected worker.

3. Giving is prompted emotionally and then rationalized. The heart has to pump the mind to go where the logic points the way.

4. Giving tends to favor the round numbers. Charles Newton of the California Institute of Technology has pointed out that even and round numbers like fifty dollars, one hundred dollars, five hundred dollars, and so on tend to be the amounts given.

5. Givers tend to follow old habit patterns. Many of the best alumni starting their annual giving to their alma mater in their first year out of college, maintain their giving with more regularity than fresh thought. There are big reasons why all fund raisers should ask people to think about their giving and to give in due proportion to their relative interest and responsibilities.

6. Tax talk seldom is a prime mover to facilitate giving. It is true that the more one has and the more one gives the more Uncle Sam will share the cost of his giving. But talk of taxes should never be one of the fund raiser's opening moves.

7. Giving tends to prosper commensurately with challenge rather than economy. Past statistics have shown that there is little or no evidence that the ups and downs of the stock market have much appreciable effect on the amount of giving.

8. Giving must be variable. One of the commonest maxims among fund raisers is that one cannot raise money adequately by the multiplication table--trying to get one thousand people to give one thousand dollars. Although mathematically sound, people tend to give below the average amount expected of a certain number of people.

9. Giving needs an atmosphere of optimism and universality. Again, because everyone needs to feel they are worthwhile members of a worthwhile group, because pride of association packs such a big punch, it naturally follows that all fund raising is best conducted in an atmosphere of optimism and universality. The Philanthropic Road sees few travelers who willingly walk alone. Most people, and most often the rich, usually prefer a parade. (pp. 28-33)

John E. Walsh, Vice-President for Academic Affairs at the University of Notre Dame, summarizes the relationship between the solicitor and the giver in this way: "Aristotle pointed out long ago that the finest compliment one man can ever pay another is to ask him to do a favor" (Seymour, 1966, p. 70).

#### Some Techniques of Fund Raising

Fund raising which utilizes a person-to-person encounter possesses several advantages:

1. the emphasis on the urgency of the request;
2. the demonstration that the prospect is worthy of personal attention;
3. the communication value of asking with verbal and non-verbal skills;
4. review of immediate feedback from the prospect;
5. the alternatives of using charts, brochures, or visual aids in the presentation; and
6. the pressure on the prospect of saying "no" in person (Schneiter, 1978, pp. 51-60).

When utilizing a person-to-person contact, it is important to know all you can about the background of your prospect. One of the keys is to find what personal needs the prospect has that match your institution's needs. Resources for investigating the background of



the prospect include mutual friends, business friends, and newspapers. Balthaser (1979) encourages fund raisers to become acquainted with their prospects by becoming acquainted with:

1. their chief interests;
2. their connection with the institution;
3. the institution's needs and how it relates to each prospect;
4. levels of past support for previous needs;
5. their giving potential; and
6. the influences of other people on each prospect.

The telethon is another effective technique to utilize in securing gifts for an institution. Among guidelines to be considered for a telethon are the following:

1. The average gift is usually between twenty and forty dollars.
2. It is inappropriate to ask for large sums over the phone.
3. Compile a calling list before the telethon begins.
4. Prepare "telefund" cards showing basic information about prospects as well as past giving experiences.
5. Send a pledge reminder along with a thank-you note.
6. Utilize a rate of one caller for every forty prospects on your list.
7. Arrange for facilities.
8. Enlist callers.
  - a. Recruit volunteer help;
  - b. greet callers warmly on the night of calling;
  - c. instruct them with guidelines;

- d. keep a running total; and
- e. announce the grand total.

9. Leave a thank-you note for the use of facilities or for someone's office or desk. (Schneiter, 1978, pp. 62-65)

The nice feature of the telcthon is that a large number of people can be reached economically while still allowing for personal contacts with the prospects.

Direct mail is another tool fund raisers can use. Some guidelines to be considered in direct mail are these (Schneiter, 1978, pp. 66-72):

- 1. a 5 percent return is good;
- 2. an address list is needed and there is strength in the number of names on the list;
- 3. plan the mailer--
  - a. a self-mailer or
  - b. an envelope mailer; and
- 4. consider the letter format--
  - a. the lead is most important,
  - b. the body should build from the lead,
  - c. the last paragraph should summarize the appeal,
  - d. use short simple sentences,
  - e. use a conversational writing style, and
  - f. include a P.S. because these have high readership.

In his direct-mail seminars, Huntsinger (1973) focuses on five basic considerations in direct-mail efforts:

- 1. the appeal or cause;
- 2. the mailing date;
- 3. the economics aspects of mailing;

4. the list of the people who will receive mail; and
5. the package which includes the mailing pieces.

Huntsinger further states that the direct-mail letter should be made personal; simplicity is the key, so that each reader can clearly understand the contents. Whenever possible, human-interest stories should be incorporated into the letter. The institution should be portrayed as caring about the individual receiving the letter. Some type of thank-you message also needs to be conveyed. It is essential that direct mail emphasizes the idea of providing an opportunity rather than merely making an appeal.

#### Early Days of Fund Raising

Ever since the founding of Harvard University in 1636 as the first college in the New World, colleges and universities have been constantly challenged with problems and crises pertaining to finances. In the early colonial days, colleges and universities centered around the religious community. They were organized to serve the wealthy and develop church and community leaders. One of the first concerns was how to finance these institutions (Cutlip, 1965, p. 3).

The first systematic approach to raising money was by Harvard University in 1641 (Cutlip, 1965, p. 3). Harvard sent three clergymen to solicit money for the college to cover deficits as well as help to educate the Indians. According to Beverly McAneer, "The greatest problem faced by the college administrators was that of getting the money necessary to help the college operate, for student fees paid only a small part of the cost" (Cutlip, 1965, p. 4).

The colonial period also saw appeals made to the general public by means of lotteries and subscription lists. Tickets for the first

lottery were sold by Harvard in 1775, but due to the outbreak of war a drawing was not held until a second lottery twelve years later. These funds helped the newly founded college; however, many of the existing colleges in the 1770s were still operating on deficit budgets (Cutlip, 1965, pp. 3-6).

All through the 1800s, college presidents did practically all the fund raising. Frequently, the president would visit and preach in the churches and gather funds for his institution. A typical example can be seen with President E. P. Tenney of Colorado College. The story is told by James Drummond Ellsworth:

Every now and then the College (Colorado) treasurer would report the young, struggling institution was out of funds. Thereupon, "Prexy" Tenney would jump the next train for the East where by hook or crook he would procure enough money to keep going for another few months. As far as anyone knew he never came back empty handed and the College never closed down . . . The enterprising president brought back from the East not only money for the College, but also brought back students to fill the dorms . . . (Cutlip, 1965, p. 19)

Then in 1890, a new approach was taken by Yale. Yale established a Yale Alumni Fund (Gerlinger, 1938, p. 103). William Graham Sumner, professor at Yale, may have been one of the first men to see the importance of alumni support. He wrote:

In the first place, when we get tired of waiting for the rich man's thousands, we can begin to take the poor man's dollars. We have examples enough before us of success in business which has been won by seeing that there was more money to be made out of the pennies of the million than out of the dollars of the upper ten thousand. No graduate of the college has ever paid in full what it cost the college to educate him. A part of the expense was borne by the funds given by former benefactors of the institution. A great many can never pay the debt. A very few can, in their turn, become munificent benefactors. There is a very large number, however, between these two, who can, and would cheerfully, give according to their ability in order that the college might hold the same relative position to future generations which it held

to their own. The sense of gratitude, the sense of responsibility, the enlightened interest in the cause of education, which are felt by these men, constitute a source which has never yet been tried, but which would yield richly. (Pollard, 1958, p. 92)

The Yale Alumni Fund of 1890 saw a product of \$11,000 for the effort which involved 385 alumni. By the 1920s this same fund grew as over 9,000 alumni contributed a total of approximately \$500,000 (Gerlinger, 1938, p. 104).

In the 1830s, Mary Lyon, a dedicated teacher, wanted to establish a college for women. On September 6, 1834, Miss Lyon began her drive for money to establish Mount Holyoke. She set out by personal appeal and letters to raise the funds needed. After traveling hundreds of miles and soliciting gifts in amounts of six cents and up, Miss Lyon single-handedly reached her goal to establish a women's college, Mount Holyoke (Cutlip, 1965, pp. 9-10).

Another challenge to higher education came with the passage of the Morrill Act in 1862, which gave federal lands to states that would establish colleges devoted to agriculture. The Act gave birth to many state universities and, in its wake, presented the challenge of adding facilities and staff and how to finance them. One may say that this Act eventually forced state institutions as well as private schools to become involved with fund raising (Cutlip, 1965, pp. 11-16).

One idea different from the raising of funds by the university president was demonstrated in 1876 at Fisk University. At Fisk, the building of Jubilee Hall was funded primarily through the efforts of its Glee Club singers. The Fisk Jubilee Singers raised funds while performing on concert tours (Cutlip, 1965, p. 18).

In 1879 Tuskegee Institute opened its doors due to funds

obtained through solicitation by Booker T. Washington (Cutlip, 1965, pp. 10-18).

### Fund Raising in the 1900s

The 1900s ushered in new ways to add to the already established methods of fund raising. In 1914 the University of Pittsburgh hired Charles Sumner Ward, a giant in the skills of fund raising for community services. The University of Pittsburgh was seeking \$3 million to develop its campus. Ward agreed to accept the challenge and organized a campaign to raise the funds. He brought in people to handle publicity and established a system to implement his plans. Ward's success did not result from any personal charisma, rather it came from his thorough and practical organizational methods. In ten days nearly \$2 million was raised (Cutlip, 1965, pp. 85-86). His organizational approach triggered new thoughts on planning, setting up, and running a fund-raising campaign.

By 1924 the word "development" began to appear. Development was first used in fund raising by President Ernest DeWitt Burton of the University of Chicago (Seymour, 1966, p. 115). A developmental organization can also be seen in the establishment of the Harvard Endowment Fund campaign. When they set a goal of \$10 million, the organizers of the Harvard Endowment Fund changed the course of fund raising for American higher education. In this case, the campaigners obtained an actual estimate of expenses and planned an effective budget. They did not merely ask for money for the free use of the University; instead, they established in a list of priorities Harvard's most pressing needs. The actual request for gifts was preceded by an intensive publicity program which pinpointed the

services and needs of the University. The campaign committee divided its members into district chairmen who in turn appointed vice-chairmen. Local campaign committees, each challenged with a definite quota, were appointed in major cities. Thorough organization for the fund raising was maintained and in November 1919, \$14.2 million had been raised (Cutlip, 1965, pp. 172-175).

This same needs approach was used at Johns Hopkins University by William H. Welch, who was instrumental in raising millions of dollars in the 1920s. It was this campaign that enabled Johns Hopkins to become a leader in the area of medicine (Seymour, 1966, p. 75).

The early 1900s also showed significant advancement in alumni giving. Bishop William A. Lawrence raised about \$2,400,000 in one year from approximately two million Harvard alumni. He accomplished this through personal interviews, letters, and circulars sent to all Harvard alumni (Gerlinger, 1939, pp. 103-104).

The 1920s also saw another of the early alumni campaigns take place at Colgate University. The campaign goal was set at \$1 million. It was entitled "333"--devised from the fact that Colgate at that time boasted of 3,300 alumni (by dividing 3,300 into \$1 million the "333" title was coined) (Cutlip, 1965, pp. 262-264). The campaign was such a success that other institutions followed Colgate's example.

During the depression years of the 1930s, alumni funds made a real impact. An evidence of their value can be seen in several institutions of higher education. For instance, Cornell University, facing a deficit of \$150,000 in 1932, saw the problem eliminated by a stream of small gifts from alumni. Likewise, in 1935 Columbia University showed a deficit of \$600,000. Alumni contributions helped Columbia

settle the outstanding debt (Gerlinger, 1938, p. 104).

In 1935, a valuable lesson about fund raising was learned in connection with the Will Rogers Memorial Fund. Will Rogers lost his life in an around-the-world flight with Wiley Post. Many of Will Roger's powerful friends wanted to honor his memory with a fund. They made no goal and established no specific program. They simply established the memorial and publicized it widely by posting in all bank windows and post offices signs inviting the people to donate to this memorial. To make it as simple as possible for people to contribute, there were state chairmen in forty-seven states and 2,732 local chairmen. The fund drive opened in September. It was to close on Thanksgiving day in 1935. However, as of December 14, 1935, there was a total of only \$65,802.72; campaign expenses were \$59,716.92. The valuable lesson demonstrated here for all fund raisers is that publicity alone does not raise the necessary money. A program based on needs and with established goals elicits a commitment from the constituency (Seymour, 1966, pp. 93-95).

Alumni fund giving through the 1940s continued to grow. By 1956, 398 United States colleges and universities reported annual alumni funds to the American Alumni Counsel (Fellows & Koenig, 1959, pp. 216-217). The Counsel also reported a total of 442 institutions of higher education having some type of alumni giving. These 442 institutions showed that 1,016,484 alumni were giving to their alma mater and accounted for a grand total alumni contributions of \$106,041,243. For all 442 institutions reporting, the average annual gift per alumna/alumnus was \$35.60 (Pollard, 1958, pp. 94-95).

Since 1951, the Yale Alumni Fund, the oldest in the country,



has raised in excess of \$1 million each year from its alumni. In 1955 alone, Yale raised \$1,302,324 from its alumni (Seymour, 1966, p. 147).

Dartmouth College prospered also during this time. The Dartmouth Alumni Fund raisers used class agents for their organizational pattern. Each class agent required help from others in his class so that all those alumni assigned to them could be approached personally. Dartmouth believed that the most effective means of procuring a gift is through personal solicitation. In addition, the Dartmouth Alumni Fund raisers also used four general mailings each year to keep their alumni informed. Like many alumni funds, that of Dartmouth started modestly but grew into an effective organization. In 1915, 536 contributed to the alumni fund for a total gift of \$6,580; in 1944, the amount climbed to \$284,565, with 13,509 contributors; and in 1956, 20,714 alumni took part in raising \$864,230 (Pollard, 1958, pp. 108-111).

During this same period, Princeton University added a feature to its alumni organization. It developed regional committees on a national scale. The regional organization worked with the class agents and reported directly to the University's fund office (Pollard, 1958, pp. 111-113).

Since 1956, techniques in public relations and fund raising are now associated with words like campaigns, drives, and programs--all of which have been implemented in the alumni program. It is clearly evident by now that institutional advancement departments must seek support among alumni--and those institutions with the strongest alumni are the most likely to advance.

From 1955 to 1968, the total number of institutions of higher education increased from 1,886 to 2,537. Of this increase of 651,

public institutions accounted for 376, while private ones accounted for only 225 (American Council on Education, 1969, p. 9117). During the same period, overall enrollment in private institutions decreased from 44 to 29 percent (American Council on Education, 1970, p. 4019). According to the National Center for Educational Statistics, the peak number of high-school diplomas would reach approximately 3,160,000 in 1978 and then decline throughout the 1980s. In fact, estimates claim that around 460,000 fewer young people will come out of the high schools each year (Maeroff, 1978, p. 18). This projected drop in the number of high-school graduates is the natural outcome of the prediction that the birth rate would fall from 4.3 million to 3.2 million between 1979 and 1992, an eventual 26 percent decline in the age group that will comprise a large portion of the college freshmen (U.S. News & World Report, May 29, 1978, p. 64).

To this day financial problems and crises in education persist. Since the early 1970s, colleges and universities in the United States have faced an ever-more-serious series of crises. To a great extent, the problems have been created by a number of simultaneous factors: increasing educational costs, increasing demands for educational services, economic problems along with continued inflation, and a decline in federal and state aid. Private liberal arts colleges have been hit particularly hard by enrollment shortages, diminishing public support, and difficult financial situations. President John R. Silber of Boston University summed up the hardships by saying, "There are going to be academic ghost towns all over the country" (U.S. News & World Report, May 29, 1978, p. 64). Robert King, Dean of the University of Texas College of Liberal Arts, described the 1980s as a "lean and

mean" one for institutions of higher learning (USA Today, December 1979, p. 8).

Donald A. Pyke, Coordinator of Academic Planning for the University of Southern California, believes that due to the soaring costs passed on to students, enrollments in private institutions will decline sharply. He bases this prediction on a 1974 analysis showing endowments per student. The analysis reveals that institutions with 1974 endowments of \$34 and less per student will be hardpressed to survive in the 1980s. Institutions with endowments in 1974 of under \$200 per student will be in difficulty after 1987. And institutions with 1974 endowments of \$3,700 per student could be in financial trouble by the year 2000 (USA Today, December 1979, p. 8).

The Chronicle of Higher Education survey discovered that the outlook for enrollment in private institutions is worse for 1982-83 than the previous year. Students who might have considered private institutions in better economic days are now applying at public colleges and universities. Some institutions have reported increases of 10 percent or more in the number of freshman applications. Public colleges and universities already have 78 percent of the total enrollment, and if these indications persist it would mean further difficulty for the private institutions of higher education (Magarrell, May 5, 1982, pp. 1, 8).

Many small private colleges have felt the burden of dropping enrollments already. Morris Harvey College in Charleston, West Virginia, has had a drop in student enrollment from 1,868 in 1970 to 1,025 in the fall of 1978. Because of this tragic decline, the institution has been operating at a deficit since 1972. The 1978 deficit showed that Morris Harvey lost a total of \$281,000 (U.S. News & World Report,

May 29, 1978, p. 64). Finally, Morris Harvey College changed from a private institution to the state system and in 1979 changed its name to the University of Charleston. David Lipscomb College in Nashville, Tennessee, presents another illustration. In 1978 David Lipscomb showed a deficit of \$995,000, caused mainly by rising energy costs and inflation (U.S. News & World Report, May 29, 1978, p. 65). Harvard President Derek Bok believes that the real impact in the decline of enrollment has not yet been felt and that the decline will provide many more serious pressures in the next generation (Time, January 15, 1979, p. 38).

Public institutions present another problem for private institutions of higher education. Public institutions receive regular subsidies from state governments which allow them to keep tuitions low. The average yearly tuition of private institutions of higher learning is around \$2,970 compared to the tuition of a public institution at \$600. Public institutions have become an even greater bargain over the years as the gap between tuitions at private and public institutions has grown from \$416 per year in 1956 to more than \$2,000 annually in 1978. President Peter Armacost, of Florida's Eckert College, says, "It's very hard to sell at a fair price what's being sold down the street for 25% of the cost" (Time, January 15, 1979, p. 38).

Michael Radock, University of Michigan Vice-President for University Relations and Development, believes the greatest problem continues to be finances for institutions of higher learning (USA Today, October 1980, p. 6). Due to these financial problems, many small, private liberal arts colleges have had to close their doors. This is interesting to note because of the first 108 colleges established in

America, 106 had their origins in religious circles. Due to the leadership and generosity of these eastern colleges and universities, many middle west and far west institutions had their beginnings (Gerlinger, 1938, pp. 77-79). However, between 1970 and 1976 the National Association of Independent Colleges and Universities reports that 113 private schools have closed (U.S. News & World Report, May 29, 1979, p. 65). In the past decade, 201 institutions of higher education have closed; of these, 165 were private institutions (Maeroff, 1978, p. 18). In addition, a study by the Carnegie Foundation predicts that as many as 300 institutions will vanish through the 1980s (Time, January 15, 1979, p. 38). This is also supported by other educational experts who believe the count could go as high as 500 (USA Today, October 1980, p. 6).

To help offset these problems, many institutions have experimented with computerized systems, management by objectives, and other management strategies (Baldrige, 1980, p. 118). Some institutions have tried creative approaches. George Washington University has constructed new buildings on its own property and then leased them to businesses. Millsaps College, in Jackson, Mississippi, reaps \$200,000 per year from a Holiday Inn and service station that the institution owns (U.S. News & World Report, May 29, 1978, p. 66). Other institutions are attempting to build their advancement departments to offset the financial crisis.

This study focuses on the alumni and their potential giving power to help meet the challenges and crises now faced by colleges and universities. Charles W. Eliot expressed the importance of alumni in stating:

It is, of course, largely by the extent of the support accorded to a college by its own graduates that the world

judges of the right of that college to seek cooperation of others in planning for the future. An institution that cannot rally to its financial assistance the men who have taken its degrees and whose diploma is their passport into the world is in a poor position to ask assistance from others. It is not merely what the alumni give; it is the fact they do give that is of supreme importance. (Pollard, 1959, p. 91)

Alumni are the keepers of an institution's tradition as well as a mark of its quality. The alumni movement is nearly as old as higher education. Yet, alumni involvement in financial affairs is largely a twentieth-century development.

The impact of alumni in giving can be enormous. An example can be seen in the generous gift to Emory University by one of its alumni. Robert Woodruff, the retired Coca Cola president, presented Emory three million shares of Coke stock worth \$102 million. What a beautiful challenge Emory University now faces! How will it spend this large gift? Emory University President James T. Laney says: "We encourage everyone to drink Coke" (Newsweek, November 26, 1979, p. 76).

Another encouraging report showed that in 1979-80, alumni gave approximately \$910 million, which was an increase of 16 percent over the previous year (Magarrell, 1981, p.9). Then, in 1980-81 voluntary support from all sources to higher education took another jump and rose approximately 11.3 percent for a total of \$4.2 billion. Alumni giving exceeded the billion dollar mark for the first time with \$1.049 billion. This is a 15.3 percent increase in total giving by alumni (Magarrell, 1982, p. 7).

According to one statistical report, the year 1980-81 saw these amounts funded to respective alma maters by their alumni (Voluntary Support of Education, 1980-1981, 1982):

Harvard University	\$37,639,913
Yale University	32,096,311
Stanford University	17,888,040
Johns Hopkins University	4,466,219
Washington University	5,089,743
Cornell University	24,077,441
Columbia University	16,081,756
Princeton University	16,457,514
Dartmouth University	25,550,010

One can see the enormous role alumni play in fund raising.

However, many institutions need to improve their strategy for alumni giving. This is demonstrated by the fact that between 60 and 80 percent of all college alumni fail to give even a single dollar to their alma mater (USA Today, October 1980, p. 6). This is also substantiated in a survey by the Council for Financial Aid to Education which showed that less than one-sixth of the alumni gave gifts to their alma mater in 1980-81. Of those who did give, the average gift was \$98.15 (Magarrell, 1982, p. 7).

#### Summary

American colleges and universities have always been beset with problems; yet, today American higher education faces a task of great magnitude. The 1980s bring increasingly dangerous problems to bear on education. Both state and private institutions face a decline in enrollment. Likewise, both are experiencing enormous operational expenses. Private institutions are also faced with high tuition fees which present a challenge from the less expensive state colleges and universities. The commitment of society to higher education also seems

less certain. All of these factors have led to urgent attempts to find alternative patterns of funding for higher education. There has come a growing awareness among all private sectors of higher education for the need of building up sources of regular support. Since institutions already have alumni support, the natural procedure is to build upon it. Each college or university must, of course, work out its own plan, but alumni support is needed as a part of the overall strategy. A sound alumni operation can furnish the base on which a successful institutional advancement program can be built. Never in the history of higher education have such programs been as vital as today.



## CHAPTER III

### METHODOLOGY

This chapter presents the design of the study, the population, the procedures involved, the null hypothesis, and the statistical analyses.

#### Design

This experimental research project compared the relative effectiveness of six methods of stimulating alumni giving. The experimental design used for the study was a pre-test/post-test control group design.

#### Population and Sample

Subjects for the experimental design were the alumni of Bethel College. Bethel College, founded in 1947 by the Missionary Church, is located on a beautiful, wooded campus on the edge of Mishawaka, Indiana, immediately adjacent to South Bend and ninety miles east of Chicago. Bethel's enrollment is approximately 500 students. Bethel College is fully accredited by the North Central Association of Colleges and Schools and holds membership in the Council for the Advancement of Small Colleges, Indiana Conference of Higher Education, and Independent Colleges and Universities of Indiana.

Students are admitted without discrimination as to race, color, national, or ethnic origin. Approximately two-thirds of the student

body live in campus housing, while the remainder commute from the surrounding area.

As a four-year, coeducational, Christian liberal arts college, Bethel offers majors in twenty-seven areas that lead to a Bachelor of Arts degree and twelve programs which lead to a two-year Associate of Arts degree.

An alphabetical listing of the 3,682 names on Bethel's alumni mailing list was secured from the Institutional Advancement Office at the College. Using a random number generator, fifty names from the list were randomly selected for each of the six treatment groups--a total of 300 subjects.

#### Procedures

Pre-testing utilized the contribution records of the alumni over the two-year period from June 1979 to June 1981, from which an individualized average annual dollar amount was ascertained. The post-test data consisted of the actual dollar amounts of individual gifts returned to Bethel after the selected treatments had been used.

The independent variables in this study consisted of six treatments, defined as follows:

$X_1$  = "Dear Friend" form letter

$X_2$  = telethon

$X_3$  = personalized letter

$X_4$  = gimmick letter

$X_5$  = letter offering incentive gift

$X_6$  = personal visitation

The major dependent variable was the gift incomes derived from each of the six treatments:

$O_{02}$  = gift income derived from treatment  $X_1$

$O_{04}$  = gift income derived from treatment  $X_2$

$O_{06}$  = gift income derived from treatment  $X_3$

$O_{08}$  = gift income derived from treatment  $X_4$

$O_{10}$  = gift income derived from treatment  $X_5$

$O_{12}$  = gift income derived from treatment  $X_6$

Two additional dependent variables were obtained as follows:

1. Net gift = gift income - expenses
2. Increase = gift income - (previous gift + expenses)

The procedure for the "Dear Friend" form letter was to send each member of that subsample of fifty a letter addressed "Dear Friend." The body of the letter contained information regarding plans for building a new library named after Otis R. and Elizabeth A. Bowen. (Dr. Otis R. Bowen is the former governor of the State of Indiana.) The letter emphasized the goal set for the alumni over the next three years. Each letter was signed individually by the researcher, with a postscript that indicated that a follow-up letter would come if there was no response. The letter included informational flyers regarding Otis R. and Elizabeth A. Bowen as well as information on tax credits. A copy of this information is found in appendix B.

The procedure for the telethon was quite different. Between February 14 and February 21, 1982, a personal call was placed to each of the fifty alumni from the sample population. One person, the researcher, did all telephoning to standardize the procedure, thus eliminating the variable effects of many different people and their personalities affecting the results. Each phone call consisted of four steps: (1) the warm-up; (2) pertinent facts on the library; (3)

asking for the gift; and (4) a thank you.

The fifty subjects receiving the personalized letter treatment were sent the same letter as the "Dear Friend" sample, with one exception--the use of personal names. Each letter's salutation was addressed to a specific individual. It also contained the informational flyers as well as a statement that, if no response was received, a follow-up letter would be utilized.

The gimmick letter contained the same information regarding plans for building a new library as was found in the "Dear Friend" and personalized letters. This treatment, however, was extended to include a gimmick designed to enhance the reply. The idea of a "coffee a day for Bethel College" was introduced. The letter promised that if the individual would make a contribution to Bethel College's new library, he or she would receive a "handsome coffee mug." This letter likewise contained the informational flyers and a note stating that a follow-up letter would be sent if there was no response.

The fifth treatment utilized an incentive gift with a letter. The letter presented, to each of the fifty individuals in the sample, the idea of the new library with the additional suggestion that if they made a contribution, their names would be engraved in the "Hall of Recognition" as signifying the role they had played in the building of the new library. This letter also contained the informational flyers and the statement that a follow-up letter would be used if they did not respond.

The procedure for the personal visitations was totally different from that used in the other treatments. First, a letter was sent explaining the role alumni could have in making a new library at

Bethel College a reality. The letter also said that a phone call would be made to arrange a time, at the individual's convenience, to sit down together to discuss this opportunity and challenge. The telephone call was used merely to set a convenient time, with no formal discussion or request over the phone about the donation. Once the time had been agreed upon, a packet was prepared containing information about Bethel College, the challenge to the alumni, a special booklet on the proposed library including a sketch, information on Otis R. and Elizabeth A. Bowen, information on Indiana tax credits, and a series of envelopes as reminders of their pledge. Arrangements were made so the researcher could visit several people in a given area--thus minimizing both cost and time. (These expenses were subsequently divided equally among the participants for purposes of statistical analysis.)

Each personal visitation began with a warm-up and proceeded into the purpose of the meeting--establishing the need for financial assistance in the building of the new library. The packet was used to explain each phase of the program. Usually a question and answer period followed. It was discovered that a direct request for a specific sum (e.g., a \$15 pledge for three years) produced the best results. Each personal visitation was followed by a letter indicating Bethel College's appreciation for that person's time and/or contribution.

A thank-you letter was sent to all alumni participating in the study, whether or not they made a contribution to the new library.

#### Null Hypothesis

The hypothesis prompting this study centered around the six different treatments. The major dependent variables were the gift incomes derived from each of the six treatments, along with net gifts

and increases. For purposes of testing, a null hypothesis was stated as follows: Different treatments will not differ with respect to the mean incomes received.

### Statistical Analyses

In order to assess the outcomes of this study, analyses of covariance were used with one and two covariates. The analyses of covariance compared results of the selected treatments with the effects of the covariates and determined if there were any significant differences between them (Glass & Stanley, 1970, p. 266).

The two covariates were previous gifts and expenses and were designated as follows:

<u>Covariate One</u>	<u>Covariate Two</u>
O <sub>01</sub>	E <sub>1</sub>
O <sub>03</sub>	E <sub>2</sub>
O <sub>05</sub>	E <sub>3</sub>
O <sub>07</sub>	E <sub>4</sub>
O <sub>09</sub>	E <sub>5</sub>
O <sub>11</sub>	E <sub>6</sub>

A summary of the costs involved in each of the six treatments was also made. The following factors were considered:

<u>Manpower</u>	<u>Dollar Cost</u>
1. Staff time	1. Postage
2. Meeting time	2. Paper
	3. Telephone
	4. Incentive gifts
	5. Mileage
	6. Meals

Analysis of covariance compares the means of dependent variables, removing the effect of differences in the covariate means. An assumption of the analysis of covariance is that the regression slopes in the treatment groups are the same. Since the assumption of regression slopes was not upheld in this instance, a one-way analysis of variance was undertaken using the variables net income and increase. As the analysis proceeded, it became evident that the variance within groups was so large that the resulting F-ratio was reduced to below the critical value required for significance. Since the differences between the means could be practically identified, a priori tests among the means were calculated.

Following the a-priori tests, frequency distributions and histograms of the variables were prepared. Upon a study of these, and because of the inequality of variances within groups, it was decided to categorize the variables and use chi-square analyses to make comparisons among the groups.

#### Summary

This chapter has given an account of the methodology followed in this study. The design, population, procedure, hypothesis, and statistical analyses have all been discussed and presented. The following chapter presents an analysis of the data generated by the methodology described.

## CHAPTER IV

### PRESENTATION AND ANALYSES OF DATA

This chapter is devoted to three purposes: (1) an exploration of the relationships between previous gifts and gifts received after each of six treatments; (2) an examination of the relationships between previous gifts and gifts received taking into account the expenses incurred; and (3) the analysis of the hypothesis as stated in its null form.

Table 1 presents the means of three variables: previous gifts, expenses, and gifts received. Two distinct observations may be made upon examination of the table. First, the mean of the expenses

TABLE 1

#### MEANS OF GROUPS

Variables	Means	Standard Deviation	Std. Error of Mean	Variation Coefficient
Previous gifts	8.75	35.118	2.207	4.015
Expenses	10.30	24.355	1.406	2.363
Gifts received	52.65	121.296	7.003	2.303

incurred was greater than that of the previous gifts. Second, the mean of the gifts received was substantially greater than the mean of



the previous gifts, clearly indicating that something in the treatments was worthwhile.

Table 2 provides a summary of the means of the variables as they relate to each of the six treatments. The expense figures show that visitation, with a mean of \$46.85, was highest; telethon, with a

TABLE 2  
MEANS OF TREATMENTS

Variables	Treatments						Totals
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)	
Previous gifts	10.81	19.97	2.16	2.20	10.85	6.49	8.75
Expenses	1.77	6.76	1.77	2.18	2.49	46.85	10.30
Gifts received	29.60	83.80	26.90	17.70	49.60	108.30	52.65
Net gifts	27.83	77.04	25.13	15.52	47.11	61.45	42.35
Increase	17.02	57.07	22.97	13.32	36.26	54.96	33.60

mean of \$6.76, was second. With regard to gifts received, the table shows that visitation and telethon ranked one and two, with means of \$108.30 and \$83.80 respectively. There was, however, a large gap between the second and third highest. Incentive gifts ranked third with a mean of \$49.60, the highest of the letter-writing treatment means. Table 2 also shows that net gifts, which are equivalent to total gifts minus expenses, yielded a mean result of \$42.35. This statistic provides a clearer picture concerning the actual dollar gains experienced by the institution. The mean increases, which are equal to the mean gifts received minus the sums of previous gifts plus

expenses, produced figures which were illustrative of the exact amounts gained by each treatment.

An interesting change is observed when the net gifts figures are read. Net gifts show that the highest mean return was associated with telethon (\$77.04), followed by visitation with a mean of \$61.45. Incentive gifts remained third in rank and first among letter-writing treatments. Table 2 also illustrates that the pattern associated with net gifts was continued when increases were considered. Increase produced a mean of \$57.07 for telethon, followed by visitation with a mean of \$54.96. Similarly, incentive gifts was third with a mean of \$36.26.

### Testing the Hypothesis

#### Analysis of Covariance (One Covariate)

The upper two rows of table 3 summarize the means for each of the six treatments with respect to previous gifts and gifts received, with the covariate being previous gifts. In gifts received, visitation produced the greatest contribution with a mean of \$108.30, while telethon produced the second highest return of \$83.80. The second portion of the table again shows the group means as gifts received, as well as the group means adjusted for the covariate--that is, as regression analysis predicts the means would be if the groups had been equal with respect to previous gifts. The advantages of the visitation and telethon methods are clearly indicated.

The lower part of table 3 is the analysis of variance table for the comparison of the adjusted means. This shows a significant treatment effect with an F-ratio of 4.3499. However, the test of the assumption of homogeneity of regression produced an F of 2.5645 with

TABLE 3  
**ANALYSIS OF COVARIANCE**  
 (Dependent Variable--Gifts Received; Covariate--Previous Gifts)

Variables	Treatments						Totals
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)	
Previous gifts	10.81	19.97	2.16	2.20	10.85	6.49	8.75
Gifts received	29.60	83.80	26.90	17.70	49.60	108.30	52.65
	<u>Reg. Coefficient</u>		<u>Standard Error</u>		<u>T-Value</u>		
	.82244		.19130		4.29917		

Treatment Groups	N	Group Means	Adjusted Group Means	Standard Error
"Dear Friend" letter	50	29.59982	27.90462	16.17961
Telethon	50	82.79980	74.56902	16.31670
Personalized letter	50	26.89983	32.31656	16.22382
Gimmick letter	50	17.69984	23.08369	16.22322
Incentive gifts	50	49.59981	47.86957	16.17982
Visitation	50	108.29982	110.15541	16.18057

Analysis of Variance

Sources of Variance	D.F.	Sums of Squares	Mean Squares	F-Ratios	Tail Area Probabilities
Equality of adjusted cell means	5	284512.0000	56902.3984	4.3499	.0008
Zero slope	1	241779.0000	241779.0000	18.4829	<.0005
Error	293	3832806.0000	13081.2461		
Equality of slopes	5	163371.0000	32674.1992	2.5645	.0273
Error	288	3669435.0000	12741.0938		

a probability of .0273, indicating a significant departure from the assumption. As the assumption of homogeneity of regression was not supported, the analysis of covariance was not utilized. The significant F-ratio for treatment effect must therefore be disregarded.

Analysis of Covariance (Two Covariates)

Table 4 reveals an analysis of covariance using gifts received as the dependent variable and the two covariates of previous gifts and expenses. Again, an F-ratio of 2.4712, with  $p = .0326$ , indicates

TABLE 4

**ANALYSIS OF COVARIANCE**  
(Dependent Variable--Gifts Received; Covariate--Previous Gifts & Expenses)

Variables	Treatments						Totals
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)	
Previous gifts	10.81	19.97	2.16	2.20	10.85	6.49	8.75
Expenses	1.77	6.76	1.77	2.18	2.49	46.85	10.30
Gifts received	29.60	83.80	26.90	17.70	49.60	108.30	52.65

Reg. Coefficient	Standard Error	T-Value
.81440	.19251	4.23053
.15716	.37084	.42380

Treatment Groups	N	Group Means	Adjusted Group Means	Standard Error
"Dear Friend" letter	50	29.59982	29.26256	16.51610
Telethon	50	82.79980	75.21484	16.41072
Personalized letter	50	26.89983	33.60426	16.52826
Gimmick letter	50	17.69984	24.30740	16.50058
Incentive gifts	50	49.59981	49.11482	16.46678
Visitation	50	108.29982	104.39395	21.15089

## Analysis of Variance

Sources of Variance	D.F.	Sums of Squares	Mean Squares	F-Ratios	Tail Area Probabilities
Equality of adjusted cell means	5	162108.0000	32421.5977	2.4712	.0326
Zero slope	1	244136.0000	122068.0000	9.3054	.0001
Error	293	3830449.0000	13117.9727		
Equality of slopes	5	799858.0000	79985.7500	7.4428	<.0005
Error	288	3030591.0000	10746.7734		

a significant difference between adjusted group means. However, the F-ratio of 7.4428, with a probability of less than .0005, shows that an analysis of covariance should not be undertaken, since the assumption of homogeneity of variance cannot be sustained.

#### Analysis of Covariance (Net Gifts with One Covariate)

Table 5 portrays a final attempt to utilize analysis of covariance. This time, the dependent variable was net gifts, which was obtained as gifts received minus expenses. The covariate was again previous gifts. The F-ratio for comparing adjusted group means was not significant ( $F = 1.4859$  with  $p = .1943$ ). Once again, however, the assumption of homogeneity of regression was not upheld ( $F = 3.5125$  with  $p = .0042$ ), hence this analysis of covariance was also disregarded.

Table 5 also reveals an interesting fact. The top net gift was the telethon, producing a mean of \$77.03, while visitation ranked second with a mean of \$61.45.

#### Analysis of Variance on Increase

Since analysis of covariance could not be utilized, due to failure to meet the assumptions of the model, it was decided to attempt a one-way analysis of variance, using the increases in giving as the dependent variable. Table 6 shows that the leading increases came from telethon (\$57.06), visitation (\$54.96), and incentive gifts (\$36.26).

#### A-Priori Tests of Significance

The large group differences suggested that a-priori tests of significance could be undertaken (Winer, 1971, pp. 170-175). The a-priori test can be used regardless of the F-ratio in the analysis of variance, and may be employed to compare any combination of means

TABLE 5  
**ANALYSIS OF COVARIANCE**  
 (Dependent Variable--Net Gifts; Covariate--Previous Gifts)

Variables	Treatments						Totals
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)	
Previous gifts	10.81	19.97	2.16	2.20	10.85	6.49	8.75
Net gifts	27.83	77.03	25.13	15.52	47.11	61.45	42.35
	<u>Reg. Coefficient</u>		<u>Standard Error</u>		<u>T-Value</u>		
	.77131		.19293		3.99794		

Treatment Groups	N	Group Means	Adjusted Group Means	Standard Error
"Dear Friend" letter	50	27.83185	26.24203	16.31709
Telethon	50	77.03859	68.38164	16.45532
Personalized letter	50	25.12703	30.20703	16.36166
Gimmick letter	50	15.51788	20.56703	16.36107
Incentive gifts	50	47.11258	45.48990	16.31729
Visitation	50	61.45241	63.19264	16.31804

Analysis of Variance					
Sources of Variance	D.F.	Sum of Squares	Mean Squares	F-Ratios	Tail Area Probabilities
Equality of adjusted cell means	5	98847.0000	19769.3984	1.4859	.1943
Zero slope	1	212652.0000	212652.0000	15.9835	.0001
Error	293	3898213.0000	13304.4805		
Equality of slopes	5	224053.0000	44810.5977	3.5125	.0042
Error	288	3674160.0000	12757.5000		

TABLE 6  
**ONE-WAY ANALYSIS OF VARIANCE**  
 (Increases in Gifts)

Variable	Treatments						Total
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)	
Increases in gifts	17.02	57.07	22.97	13.32	36.26	54.96	33.60

One-Way Analysis of Variance					
Sources of Variance	D.F.	Sum of Squares	Mean Squares	F-Ratios	Tail Area Probabilities
Equality of adjusted cell means	5	90669.3750	18133.8750	1.3611	.2389
Error	294	3916907.0000	13322.8125		

within treatments. Table 7 summarizes the a-priori test comparing the voice-contact treatments, telethon and visitation, to the four letter-writing treatments: "Dear Friend", personalized, incentive gifts, and gimmick letters. An F-ratio of 5.66 with 1 and 200 degrees of freedom

TABLE 7

**A-PRIORI TEST**  
(Voice-Contact Treatments Minus Letter-Writing Treatments)

---


$$F = \frac{(\sum c_j T_j)^2}{(n \sum c_j^2) (MS_E)}$$

$$n = 50 \qquad \sum c_j^2 = 12$$

$$c_2 = c_6 = 2 \qquad \sum c_j = 0$$

$$c_1 = c_3 = c_4 = c_5 = -1$$

$$F = \frac{[100 (57.0686 + 54.9624) - 50 (17.0244 + 22.9671 + 13.3179 + 36.2626)]}{50 \times 12 \times 13322.8125}$$

$$F = 5.66 \qquad p = .017$$

$$F_{.95(1,200)} = 3.89$$


---

has a probability equal to .017, so a significant difference was found between the mean increase for telephone and visitation treatments combined and the mean increase for the four letter-writing treatments.

Table 8 shows the a-priori test used to compare the treatments of visitation and telethon to the treatments of incentive gifts and personalized letters. With the level of confidence again at .05 and the degrees of freedom 1 and 200, the F-ratio was 2.62, with  $p = .103$ , which indicated no significance in this comparison.



TABLE 8

## A-PRIORI TEST

(Voice-Contact Treatments Minus Incentive-Gift and Personalized Letters)

---



---


$$F = \frac{(\sum c_j T_j)^2}{(n \sum c_j^2) (MS_E)}$$

$$n = 50$$

$$\sum c_j^2 = 4$$

$$c_2 = c_6 = 1$$

$$\sum c_j = 0$$

$$c_3 = c_5 = -1$$

$$c_1 = c_4 = 0$$

$$F = \frac{[50 (57.0686 + 54.9624 - 22.9671 - 36.2626)]}{50 \times 4 \times 13322.8125}$$

$$F = 2.62$$

$$p = .103$$

$$F_{.95(1,200)} = 3.89$$


---

The a-priori test was also used to compare the means of personal visitation and telethon to incentive gifts by itself. Table 9 shows an F equal to .98, with  $p = .324$ , indicating a non-significant relationship.

### Histograms

It was noted above that the large within-group variance led to a non-significant F-ratio in the analysis of variance test. It was therefore decided to prepare histograms of the major variables to study variability within groups. Histograms were developed for previous gifts, treatments, expenses, gifts received, net gifts, and increases.

Table 10 shows a histogram for previous gifts. The key point here is that there were a number of non-giving alumni in the

TABLE 9  
 A-PRIORI TEST  
 (Voice-Contact Treatments Minus Incentive-Gift Letter)

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---

$F = \frac{(\sum c_j T_j)^2}{(n \sum c_j^2) (MS_E)}$	$n = 50$ $c_2 = c_6 = 1$ $c_5 = -2$ $c_1 = c_3 = c_4 = 0$	$\sum c_j^2 = 6$ $\sum c_j = 0$
$F = \frac{[50 (57.0686 + 54.9624 - 2 \times 36.2626)]}{50 \times 6 \times 13322.8125}$		
$F = 0.98$		$p = .324$
$F_{.95(1,200)} = 3.89$		

---

sample. The number to the right of the asterisk indicates the total number of individuals at that level. The numbers who had made no previous gifts are as follows:

"Dear Friend"	41
Telethon	39
Personalized letter	47
Gimmick letter	45
Incentive gifts	45
Visitation	41

TABLE 10  
HISTOGRAM  
(Previous Gifts)

Midpoints	Treatments					
	$x_1$ (Dear)	$x_2$ (Tele)	$x_3$ (Pers)	$x_4$ (Gimm)	$x_5$ (Ince)	$x_6$ (Visi)
330.00						
315.00						
300.00		*			*	
285.00						
270.00						
255.00						
240.00						
225.00	*					
210.00		*				
195.00						
180.00		*				
165.00						
150.00						
135.00						
120.00						*
105.00	*	*			*	
90.00						
75.00					*	
60.00			*			*
45.00	**	*		*	*	*
30.00	**	*****		*		
15.00	M**	M	**	***	M	*****
.00	*****	*****	M*****	M*****	*****	M*****
	*****41	*****39	*****47	*****45	*****45	*****41
-15.00						

Group means denoted by M's

Table 11 provides a histogram of expenses. Visitation produced the highest and greatest range of expenses, with telethon expenses being second. Expenses associated with the four remaining letter-writing treatments were never over \$15.00.

TABLE 11

HISTOGRAM  
(Expenses)

Midpoints	Treatments					
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)
285.00						
270.00						
255.00						
240.00						
225.00						*
210.00						
195.00						
180.00						
165.00						*
150.00						*
135.00						
120.00						*
105.00						
90.00						*****
75.00						**
60.00						*****
45.00						M****
30.00						*****
						*****
15.00		*****				*****
		*****18				
.00	M*****	M*****	M*****	M*****	M*****	*****
	*****50	*****32	*****50	*****50	*****50	
-15.00						

Group means denoted by M's

In table 12, the histogram of gifts received shows that there were many more contributions from visitation and telethon treatments than from the "Dear Friend", personalized letter, gimmick, and incentive

TABLE 12  
HISTOGRAM  
(Gifts Received)

Midpoints	Treatments					
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)
660.00						
630.00						
600.00	*					
570.00						
540.00		***	**	*	**	***
510.00						
480.00						
450.00		*				
420.00						
390.00						*
360.00		*				
330.00						
300.00		**			*	
270.00						
240.00	*					**
210.00	*	*			**	***
180.00	*	*				
150.00						*
120.00		*				M
90.00	*	M**		**	*****	*****
60.00	**	**	*	**	M***	*****5
30.00	M	*****	M*****	M*		*****
.00	*****	*****	*****	*****	*****	*****
	*****42	*****27	*****40	*****43	*****36	
-30.00						

Group means denoted by M's

gifts treatments. It also reveals that visitation produced the fewest responses at the zero level (only 8), with telethon second at 27.

The histogram in table 13 helps explain the large within-group variance, especially for the visitation group. The table is a histogram

TABLE 13

**HISTOGRAM**  
(Net Gifts)

Midpoints	Treatments					
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)
680.00						
640.00						
600.00	*					
560.00						
520.00		***	**	*	**	**
480.00						
440.00		*				
400.00						**
360.00		*				
320.00						
280.00		**			*	
240.00	*					*
200.00	*	*			**	*
160.00	*	*				**
120.00		*				*
80.00	*	M**	*	**	*****	M***
40.00	M**	*****	M*****	**	M***	*****
.00	*****	*****	*****	M*****	*****	*****
	*****42	*****31	*****41	*****45	*****36	*****17
-40.00						***
-80.00						**
-120.00						
-160.00						*
-200.00						

Group means denoted by M's

of net gifts showing negative amounts associated with the visitation treatment, where expenses occurred with no gifts to help offset them. This may also have been true for the other treatments; but the negative net gifts were of such small values as to be shown in the vicinity of zero in the graphical output.

Table 14 is a histogram of increases. This table also shows large negative values for visitation and several smaller negative values

for other treatments. Table 14 again explains the very large within-group variance which led to a non-significant F-ratio in the analysis of variance.

TABLE 14  
HISTOGRAM  
(Increases)

Midpoints	Treatments					
	X <sub>1</sub> (Dear)	X <sub>2</sub> (Tele)	X <sub>3</sub> (Pers)	X <sub>4</sub> (Gimm)	X <sub>5</sub> (Ince)	X <sub>6</sub> (Visi)
600.00						
560.00	*					
520.00		**	**	*	**	**
480.00						
440.00		*				
400.00		*				**
360.00						
320.00						
280.00		*			*	
240.00						*
200.00					*	*
160.00	**					*
120.00		**			*	**
80.00		*****		*	****	***
40.00	***	M*****	M*****	***	M***	M*****
.00	M*****	*****	*****	M*****	*****	*****
	*****42	*****30	*****42	*****44	*****35	*****17
-40.00	**	**		*	*	*****
-80.00						**
-120.00						
-160.00						
-200.00						
-240.00						
-280.00						*
-320.00						

Group means denoted by M's

It should be noted that each of the histograms displays a great degree of skewness and wide departure from the assumption of normality of distribution associated with analysis of variance.

Chi-Square Analyses

Because of the failure of the data to support assumptions associated with parametric statistical techniques, it was decided to use chi-square analysis, a non-parametric procedure. This analysis was undertaken for each of the three variables of major interest.

Table 15 shows the contingency table and chi-square analysis for gifts received, which yielded a significant chi-square of 91.24

TABLE 15

**CHI-SQUARE**  
(Gifts Received)

	0	30	60	90-120	150-240	240+	Totals
Visitation	8	7	14	11	6	4	50
Telethon	27	8	2	4	2	7	50
Incentive	36	0	4	5	2	3	50
"Dear Friend"	42	1	2	1	3	1	50
Personalized	40	7	1	0	0	2	50
Gimmick	43	2	2	2	0	1	50
Totals	196	25	25	23	13	18	300

$$\chi^2 = 91.24 \text{ with } 25 \text{ df, } p = <.005*$$

Visitation/telethon/incentive gifts	37.99	10	, p = <.005*
"Dear Friend"/personalized/gimmick letters	7.64	10	, p = .664
Visitation & Telethon	20.71	5	, p = .001*
Visitation & incentive gifts	28.90	5	, p = <.005*
Telethon & incentive gifts	8.21	5	, p = .145

\* indicates significance



with 25 degrees of freedom and a probability less than .005. Making a comparison only among visitation, telethon, and incentive gifts, the obtained chi-square was 37.99, with 10 degrees of freedom and a probability of less than .005. There was, however, no significant difference associated with "Dear Friend", personalized, and gimmick letters. Visitation and incentive gifts produced a chi-square of 28.90 with 5 degrees of freedom and a probability of less than .005. The comparison of telethon and incentive gifts produced a non-significant chi-square of 8.21 with 5 degrees of freedom and  $p = .145$ . It may be concluded that visitation produced significantly larger gifts than either telethon or incentive gifts, and these three produced significantly larger gifts than "Dear Friend", personalized, and gimmick letters.

Table 16 reveals a significant chi-square of 58.51 for net gifts, with 25 degrees of freedom and a probability of less than .005. Also, there is a significant difference among telethon, visitation, and incentive gifts, with a chi-square of 20.51 with 10 degrees of freedom and a  $p = .025$ . The other significant comparison was visitation with incentive gifts, where chi-square was 14.95 with 5 degrees of freedom and a  $p = .011$ . Again there was no significant difference among "Dear Friend", personalized, and gimmick letters with respect to net gifts. There was also no significant difference between telethon and visitation, or between telethon and incentive gifts.

Table 17 shows a significant chi-square for increase. The value of 50.02 with 25 degrees of freedom and a probability of .002 indicates that there were significant differences among the six treatments. Only one further comparison shows a significant chi-square

TABLE 16  
CHI-SQUARE  
(Net Gifts)

	0	40	80	160-240	280-360	400+	Totals
Visitation	17	14	5	4	0	4	50
Telethon	31	6	4	2	3	4	50
Incentive gifts	36	4	5	2	1	2	50
"Dear Friend"	42	3	1	3	0	1	50
Personalized	41	6	1	0	0	2	50
Gimmick	45	2	2	0	0	1	50
Totals	212	35	18	11	4	14	300

$$\chi^2 = 58.51 \text{ with } 25 \text{ df, } p = <.005*$$

Visitation/telethon/incentive gifts	20.51	10	, $p = .025*$
"Dear Friend"/personalized/gimmick	4.28	8	, $p = .831$
Visitation & Telethon	10.14	5	, $p = .071$
Visitation & incentive gifts	14.95	5	, $p = .011*$
Telethon & incentive gifts	0.63	4	, $p = .960$

\* indicates significance

TABLE 17  
CHI-SQUARE  
(Increases)

	0	0	40	80-120	160-360	400+	Totals
Visitation	8	17	13	5	3	4	50
Telethon	2	30	6	7	1	4	50
Incentive	2	30	4	5	2	2	50
"Dear Friend"	2	42	3	0	2	1	50
Personalized	0	42	6	0	0	2	50
Gimmick	1	44	3	1	0	1	50
Totals	15	210	35	18	8	14	300

$$\chi^2 = 50.02 \text{ with } 25 \text{ df, } p = .002^*$$

"Dear Friend"/personalized/gimmick	2.64	10	, p = .989
Visitation/telethon/incentive gifts	14.92	10	, p = .135
Visitation & Telethon	7.79	5	, p = .168
Visitation & incentive gifts	11.99	5	, p = .035*
Telethon & incentive gifts	0.60	5	, p = .988

\* indicates significance

value for increases, namely visitation and incentive gifts with a value of 11.99, 5 degrees of freedom, and a probability of .035.

### Summary

The findings outlined in this chapter have served to fulfill the three purposes outlined at the beginning. The first was an exploration of the relationships between previous gifts and gifts received subsequent to each of the six treatments. The mean of all previous gifts from the six treatments was \$8.75 and the mean of all gifts received was \$52.65. This was seen in table 1. Tables 2 and 3 then showed that, in each of the six treatments, total dollar amounts of the gifts received exceeded previous gifts. This demonstrates that in all six treatments some improvement occurred. Comparing the effects of the six treatments, gifts received ranked as follows: (1) personal visitation--\$108.30; (2) telethon--\$83.80; (3) incentive gifts--\$49.60; (4) "Dear Friend" letter--\$29.60; (5) personalized letter--\$26.90; and (6) gimmick letter--\$17.69. Personal voice-contact treatments produced the best results, with personal visitation and telethon statistically ahead of the others. Of the four letter-writing treatments, incentive gifts proved most effective, followed by "Dear Friend" letter, personal letter, and gimmick letter respectively.

The second purpose was to focus on the relationships between previous gifts and gifts received, taking into account expenses that were incurred. Net gifts and increases were calculated with previous gifts, and both substantiated that personal contacts by visitation and telethon were best. However, tables 5 and 6 showed that telethon yielded the highest dollar amounts, followed by visitation. Incentive gifts was again third among all six treatments, but first in the letter

category. The "Dear Friend" letter was fourth, personalized letter fifth, and gimmick letter sixth.

The third purpose was to analyze the hypothesis in its null form: Different treatments will not differ with respect to the mean income received. Whether dealing with gross gifts, new gifts, or increases, the null hypothesis was rejected. The data presented demonstrates that there were definite differences among the six treatments. Chapter V deals with these differences and presents conclusions and recommendations based on the findings.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

#### Summary of the Study

Small, four-year, Christian, liberal arts colleges are becoming more and more dependent upon fund-raising strategies. One of the key problems is to find what strategies will work best. There are many constituencies for a college to consider in its fund-raising plans, including friends of the college, foundations, corporations, parents, faculty, staff, students, and alumni. This dissertation was specifically concerned with those strategies which work best with the alumni of an institution. It demonstrated which of six treatments studied produced the best results; and, in particular, which produced the best results in net dollar amounts when expenses were considered.

The purpose of this study was to compare various methods that could be employed to raise funds from the alumni of a small college--Bethel College in particular. The review of literature supported the advisability of such an attempt. Statistics can show how much alumni have given to an institution. However, there has been no information, supported by data, identifying those strategies which actually produce the best returns.

Three hundred alumni of Bethel College were randomly assigned to one of six treatment groups, consisting of 50 members each:

$X_1$  = "Dear Friend" form letter

$X_2$  = telethon

$X_3$  = personalized letter

$X_4$  = gimmick letter

$X_5$  = letter offering incentive gift

$X_6$  = personal visitation

A null hypothesis was then stated for purposes of testing: Different treatments will not differ with respect to the mean income received.

An experimental design was employed using a pre-test/post-test control group. Statistical analyses showed that the null hypothesis was to be rejected. The data revealed different means for all six treatments, with personal visitation showing the highest level of giving with a mean of \$108.30. Telethon was next with a mean of \$83.80, followed by the incentive letter (\$59.60), the "Dear Friend" letter (\$29.60), the personalized letter (\$26.90), and the gimmick letter (\$17.70).

Of particular interest and significant value was the analysis of data when taking into account the expenses associated with each treatment. Telethon produced the highest net gift dollar amount (\$77.03), followed by visitation (\$61.45), incentive letter (\$47.11), "Dear Friend" letter (\$27.83), personal letter (\$25.12), and gimmick letter (\$15.51). When the treatments were considered in terms of increase, a similar pattern was observed, except that "Dear Friend" and personalized letters exchanged positions.

### Conclusions

The data clearly demonstrated that there is a significant difference between each of the six treatments; and that a priority

strategy does emerge from these results which colleges and universities can utilize in their endeavors to raise funds from alumni. In terms of cost efficiency, the following strategy emerged:

A. Personal contacts

1. Telethon
2. Personal visitation

B. Letter writing

1. Letter offering incentive gift
2. "Dear Friend" form letter
3. Personalized letter
4. Gimmick letter

However, as long as expenses incurred are not excessive, the following priority strategy emerged:

A. Personal contacts

1. Personal visitation
2. Telethon

B. Letter writing

1. Letter offering incentive gift
2. "Dear Friend" form letter
3. Personalized letter
4. Gimmick letter

In order to minimize expenses, the actual dollar amount may be diminished or, by conducting adequate preliminary investigations, only those individuals likely to contribute significant gifts will be personally contacted.



### Recommendations Arising from the Results of this Study

Premised on the review of literature and the findings of this study, the following recommendations are made for review, consideration, and possible adoption:

1. It is recommended that the results of this study be reviewed by the fund raisers of small, private colleges and universities; and that they implement the most productive methods (i.e., personal visitation and telethon) as the primary means of raising funds from alumni.

2. In view of the finding that personal visitation produced the highest average dollar amount, it is recommended that this procedure be utilized as long as expenses incurred are not excessive.

3. In a comparison of personal visitation with telethon on a net gift basis, telethon produced the best results; therefore, it is recommended that telethon be considered the most cost-efficient method of raising funds from alumni.

4. In view of the finding that all four letter-writing treatments produced less gift income than the voice-contact methods of visitation and telethon, it is recommended that letter writing as a means of fund raising be used only after more personal contacts.

5. Incentive gifts proved to be the best income producer of the four letter-writing strategies, followed by "Dear Friend" letter, personalized letter, and gimmick letter; therefore, it is recommended that whenever letter writing is the chosen method of fund raising, incentive letters be utilized first, followed by the others respectively.

### Recommendations for Further Study

From this research a number of recommendations arise for further study:

1. It is recommended that a more thorough study be conducted among individuals with whom personal visitations occur. Several factors might be considered: income level, potential for large gifts, personal family data as it may impact upon giving, institutional representatives best able to approach potential donors, etc. In this manner a selective personal-visitation model might be derived.

2. It is recommended that further research be conducted to determine if continual cultivation of a person might result in increased gifts. Techniques of cultivation might include sending flowers on special occasions, birthday cards, periodic letters, and telegrams.

3. It is also recommended that a study be conducted utilizing faculty members to personally write letters to graduates from their departments, which might provide a personal touch and result in substantial gifts.

4. It is recommended that a study be conducted to learn whether personal presentations to small groups may result in good financial support from alumni. This would allow for person-to-person contact, yet reach larger numbers of potential donors than just one-on-one presentations.

5. It is recommended that a telethon study be conducted using students, rather than faculty and/or administrators, to make the contacts. Students may have better appeal.

6. It is recommended that a longitudinal study be conducted exposing participants to multiple treatments (e.g., an individual contacted by "Dear Friend" letter might later receive a personal visit).

7. It is recommended that a factorial analysis of variance design be used to determine if a second factor, namely the time of

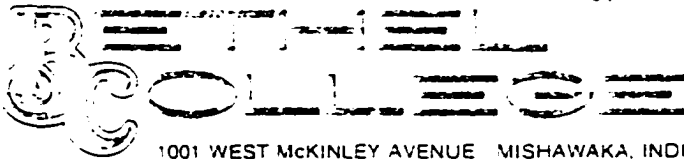
year, results in any significant difference in fund raising.

8. It is recommended that study be given to the development of computer programs to provide regularity and consistency of support that may result in more economical and efficient fund-raising efforts.

## **APPENDIXES**

APPENDIX A

LETTERS USED IN CONNECTION WITH  
THE SIX TREATMENTS



1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 46545 219-259-8511

January 28, 1982

Dear Bethel Friend,

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

I'd like to sit down with you and tell you about the new library and our plan to raise money. It's exciting! However, time and distance limit my communication with you.

The library fund raising campaign is called . . . ADVANCE. Our goal, over 3 years, is to raise \$3 million. \$1.4 million will build and equip the library, \$700,000 will endow the building, and \$900,000 will supplement Bethel's operating budget. The Alumni Association's goal is to raise \$400,000 or slightly more than 13% of the total. I'm sure we can do that much.

Many have committed themselves to more than \$15 per month because they see how important the new library will be to our school and our future students. Perhaps you will do the same.

We have the privilege to help build Bethel's new Otis R. and Elizabeth A. Bowen Library. Please be generous in your pledge and return the enclosed card today.

Thanks for your liberal gift and please write me if you have any questions.

Cordially,

Homer W. Drew  
Director of Athletics

P.S. If I do not hear from you, I will write once again. However, I promise not to disturb you beyond that.

P.P.S. If you wish, you may use your Master Charge or VISA card.

"WITH CHRIST AT THE HELM"



# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE, MISHAWAKA, INDIANA 46545 219-259-8511

January 28, 1982

Dear  $\bar{v}$ ,

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

We would like to call you and tell you about the new library and our plan to raise money for it. It's exciting!

The library fund raising campaign is called . . . ADVANCE. Our goal, over 3 years, is to raise \$3 million. \$1.4 million will build and equip the library. \$700,000 will endow the building, and \$900,000 will supplement Bethel's operating budget. The Alumni Association's goal is to raise \$400,000 or slightly more than 13% of the total. I'm sure we can do that much.

Many have committed themselves to more than \$15 per month because they see how important the new library will be to our school and all future students. Perhaps, you will do the same.

We have the privilege to be a part of building Bethel's new Otis R. and Elizabeth A. Bowen Library. We would like to call you personally on the phone, between February 14th and February 21st, to ask your help.

Looking forward to our conversation.

Cordially,

Homer W. Drew  
Director of Athletics

"WITH CHRIST AT THE HELM"



# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 45545 219-259-8511

January 28, 1982

Dear  $\bar{v}$ ,

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

I'd like to sit down with you and tell you about the new library and our plan to raise money. It's exciting! However, time and distance limit my communication with you.

The library fund raising campaign is called . . . ADVANCE. Our goal, over 3 years, is to raise \$3 million. \$1.4 million will build and equip the library, \$700,000 will endow the building, and \$900,000 will supplement Bethel's operating budget. The Alumni Association's goal is to raise \$400,000 or slightly more than 13% of the total. I'm sure we can do that much.

Many have committed themselves to more than \$15 per month because they see how important the new library will be to our school and our future students. Perhaps, you will do the same.

We have the privilege to help build Bethel's new Otis R. and Elizabeth A. Bowen Library. Please be generous in your pledge and return the enclosed card today.

Thanks for your liberal gift, and please write me if you have any questions.

Cordially,

Homer W. Drew  
Director of Athletics

P.S. If I do not hear from you, I will write once again. However, I promise not to disturb you beyond that.

P.P.S. If you wish, you may use your Master Charge or VISA card.

"WITH CHRIST AT THE HELM"





# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE, MISHAWAKA, INDIANA 46545 / 219-259-8511

January 28, 1982

Dear V,

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

I'd like to sit down with you and tell you about the new library and our plan to raise money. It's exciting! However, time and distance limit my communication with you.

The library fund raising campaign is called . . . ADVANCE. Our goal, over 3 years, is to raise \$3 million. \$1.4 million will build and equip the library, \$700,000 will endow the building, and \$900,000 will supplement Bethel's operating budget. The Alumni Association's part is to raise \$400,000 or slightly more than 13% of the total. I'm sure we can do that much.

Many have committed themselves to more than \$15 per month because they see how important the new library will be to our school and our future students. Perhaps, you will do the same.

I want to send you a "handsome coffee mug" which will constantly remind you of the library campaign. Also, I want to give you a handy packet of calendar envelopes which will make monthly remittances convenient.

We have the privilege to help build Bethel's new Otis R. and Elizabeth A. Bowen Library. Please be generous in your pledge. Return the enclosed card today as I am anxious to give you the mug and calendar envelopes.

Thanks for your liberal gift. Please write me with any questions you may have.

Cordially,

Homer W. Drew  
Director of Athletics

P.S. If I do not hear from you, I will write once again. But I promise not to disturb you beyond that.

P.P.S. If you wish, you may use your Master Charge or VISA card.

"WITH CHRIST AT THE HELM"





1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 46545 219-259-8511

January 28, 1982

Dear ▽,

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

I'd like to sit down with you and tell you about the new library and our plan to raise money. It's exciting! However, time and distance limit my communication with you.

The library fund raising campaign is called . . . ADVANCE. Our goal, over 3 years, is to raise \$3 million. \$1.4 million will build and equip the library, \$700,000 will endow the building, and \$900,000 will supplement Bethel's operating budget. The Alumni Association's part is to raise \$400,000 or slightly more than 13% of the total. I'm sure we can do that much. Our goal is for every alumnus to pledge 50¢ a day, which is \$15 per month or \$180 per year. In three years, this small daily amount would total \$540.

For this small daily amount your name will be listed in Bethel's "Hall of Recognition" as signifying the role you played in the growth of Bethel in the 80's. The "Hall of Recognition" will be located in the new Bowen Library and your name will be displayed appropriately.

Please give and ENTER Bethel's "Hall of Recognition."

Cordially,

Homer W. Drew  
Director of Athletics

P.S. If I do not hear from you, I will write once again. However, I promise not to disturb you beyond that.

P.P.S. If you wish, you may use your Master Charge or VISA card.

"WITH CHRIST AT THE HELM"





1001 WEST MCKINLEY AVENUE / MISHAWAKA, INDIANA 46545 / 219-259-8511

January 28, 1982

Dear V.

Bethel College is going to get her library. After many years of talking about it, we are finally going to build.

We would like to call you and make an appointment with you to tell you about the new library and our plan to raise money for it. It's exciting! We will be calling the next week to make an appointment.

Looking forward to our conversation.

Cordially.

Homer W. Drew  
Director of Athletics

"WITH CHRIST AT THE HELM"



# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 46545 219-259-8511

February 23, 1982

Dear Friend,

As I stated in my previous letter to you, if we had not received any response from you by February 21st in regards to helping us build the new Bowen Library, I would contact you one more time. We have had many favorable responses but still need your help to make this library a reality for our students.

If you have already made a pledge, your help is greatly appreciated. If not, won't you send a gift now?

Please remember, Bethel is a part of you and you are a part of Bethel. We need your commitment to insure its growth.

Best wishes and God bless you.

Cordially,

Homer Drew  
Director of Athletics

P.S. A pledge card and envelope are enclosed for your convenience.

"WITH CHRIST AT THE HELM"



# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 46545 219-259-8511

February 23, 1982

Dear V,

As I stated in my previous letter to you, if we had not received any response from you by February 21st in regards to helping us build the new Bowen Library, I would contact you one more time. We have had many favorable responses but still need your help to make this library a reality for our students.

If you have already made a pledge, your help is greatly appreciated. If not, won't you send a gift now?

Please remember, Bethel is a part of you and you are a part of Bethel. We need your commitment to insure its growth.

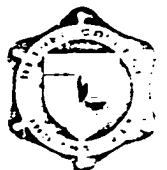
Best wishes and God bless you.

Cordially,

Homer Drew  
Director of Athletics

P.S. A pledge card and envelope are enclosed for your convenience.

"WITH CHRIST AT THE HELM"



# BETHEL COLLEGE

1001 WEST MCKINLEY AVENUE MISHAWAKA, INDIANA 46545 : 219-259-8511

March 31, 1982

∇

Dear ∇,

We are happy to acknowledge receipt of your kind contribution to the new Otis R. and Elizabeth A. Bowen Library. We sincerely thank you for your interest in both Bethel College and in the growth of today's youth and their role as leaders of tomorrow.

May God bless you and continue to use you in His service.

Cordially,

Homer W. Drew  
Director of Athletics

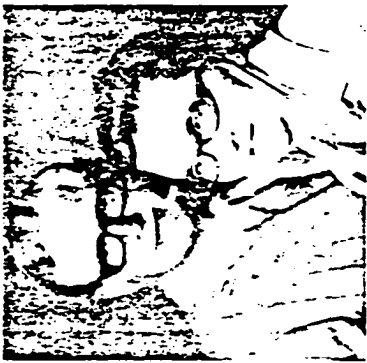
Enclosure

"WITH CHRIST AT THE HELM"



**APPENDIX B**

**INFORMATIONAL MATERIAL RELATING  
TO THE SIX TREATMENTS**



# A TRIBUTE TO OTIS AND BETH BOWEN

## Otis R. and Elizabeth A. Bowen . . . A Lifetime of Dedication

Born February 25, 1918 at Richland Center, Dr. Bowen received his A.B. and M.D. degrees from Indiana University. After completing his internship at South Bend's Memorial Hospital, he was commissioned as a First Lieutenant in the U.S. Army Medical Corps and later advanced to Captain.

In 1939, he married the late Elizabeth Ann Steinmann. During her many years in public and community service, Beth Bowen served as the President of the Marshall County Medical Auxiliary, State Chairman on Legislation for the Indiana State Medical Association and as a member of the National Advisory Committee of the Education Commission of the States. In addition, she was selected as Indiana's Mother of the Year in 1978 and recently served as Honorary Chairman of the Task Force for the International Year of the Child.

Otis R. Bowen served as a Republican member of the Indiana House of Representatives for 14 years before being elected Indiana's 42nd Governor in 1972. He was reelected by a record margin in 1976, and having just completed his second term, he was the first Governor of Indiana to serve eight consecutive years. Governor Bowen has served in many capacities relating to his role as Indiana's Governor as well as being a member of several boards of trustees. Some of his positions include: Chairman, National Governor's Association; Chairman, Education Commission of the States, Advisory Commission on Intergovernmental Relations; member of the Valparaiso University and Ancilla College Board of Trustees; and member of the Fellowship of Christian Athletes Advisory Board.

He has been a member of various county, district, state and national medical associations as well as been honored by many local, state and national organizations for his contributions as both a legislator and governor. These awards include the first Dr. Benjamin Rush Award, presented to Dr. Bowen by the American Medical Association in 1971.

**ADVANCE**  
THE  
CAMPAIGN FOR THE  
BOWEN LIBRARY AT  
BETHEL COLLEGE

MDWAFFA@AOL.COM  
(219) 259-8511



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## The Challenge Ahead for Bethel College

Bethel College has reached a critical point in its plans for the future. To continue to advance its educational mission, Bethel must assure its students of every available resource to aid them in their growth and development.

Bethel offers an education which has earned the respect of leaders in all professions -- an education based on values, ethical concerns and consideration of the whole individual. But the essential component of an outstanding liberal arts community is the library facilities.

In 1969, the college's self-study report to the North Central Association of Colleges and Schools stated that "the present library can serve the college for another year or two fairly adequately". That library has been forced to serve for 11 years since that time.

Bethel's Advance Campaign will provide a new library with holdings, resources and equipment that will exemplify the expanded role that libraries play in higher education today -- the true intellectual center of the entire campus.

The pool for prospective college students is lower now than at any other time in recent history. Yet Bethel's enrollment is growing. The need for the new library facility is of paramount importance to keep pace with this growth pattern.

The financial goals of the Advance Campaign for the Bowen Library total \$3 million. The goal of the Advance Campaign is to raise \$1 million of that amount through the friends of Governor Bowen. Thus far, \$150,000 in gift pledges has been received from that source. That means an additional \$850,000 is needed between now and September, the target date for laying the cornerstone and beginning the construction work.



The new Otis R. and Elizabeth A. Bowen Library at Bethel College will be a tribute to one of Indiana's most popular and successful public servants, as well as a marked contrast to the facility currently serving young people in their pursuit of learning. Seating will be provided for 125 students -- nearly four times the capacity of the present library. There will be space for some 75,000 volumes, most arranged in open stacks where students can circulate freely and select the materials they need for their studies.

Within the library, specialized facilities will encourage independent study and research. Study rooms with tables, chalkboards, and chairs will allow students to work on group projects. One room will be equipped as a typing room. A conference room and a seminar room will provide space for classes or meetings in the library. The audiovisual area will be equipped with record storage bins, filmstrip viewers, a conduit for closed circuit television, and listening stations with stereos/headphones. The curriculum laboratory and the language laboratory will also be housed in the library -- each in an enclosed area so students and faculty may confer with each other or study alone.

Like any well designed building, the Bowen Library at Bethel College will have its centerpiece -- the area on which the entire facility is focused. In the new library, this centerpiece will be the Special Collections Room. There, Otis Bowen's collected papers, representing over 27 years of Indiana government, will be housed. Secured display cases will permit certain items to be on public display, while others will be organized in file cabinets or on shelves. This Special Collections Room will offer resources to care for books, manuscripts, pictures, periodicals, and other miscellaneous holdings. The area will be equipped with tables for study, an adjoining conference room and restrooms. It is so designed that if future expansion is desirable or necessary, it can be easily accomplished.

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## The Otis R. & Beth A. Bowen Library

---

An investment in the new Bowen Library is the kind of gift that never stops reaping rewards, for it is an investment in the lives of people. An improved library at Bethel means a better education for the college's students -- students who each year leave the campus to enter the world of business, education, the social services, Christian service, and a host of other fields. And with them, they take their commitments, their ethical standards, their sense of values to professions that range from the ministry to small business, nursing, social work, teaching, and computer science. Right now, for example, over 2,000 Bethel graduates are living and working in Indiana, and about a third of them are teaching in public and private schools. They make a vital difference in the work environments they enter, and in the people whose lives they touch.

A gift to the Advance Campaign will accomplish two important goals. First, it will honor one of the greatest statesmen of Indiana, and provide a permanent house for the record of his public service. And equally important, it will help assure future generations of the opportunity to pursue and meet the challenges of coming decades. In today's society, we cannot afford to ignore the kind of growth that Bethel graduates bring about. Humane business, compassionate social service, teaching with an emphasis on the individual worth of each child and everywhere a constant

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## Your Gift to Advance Campaign

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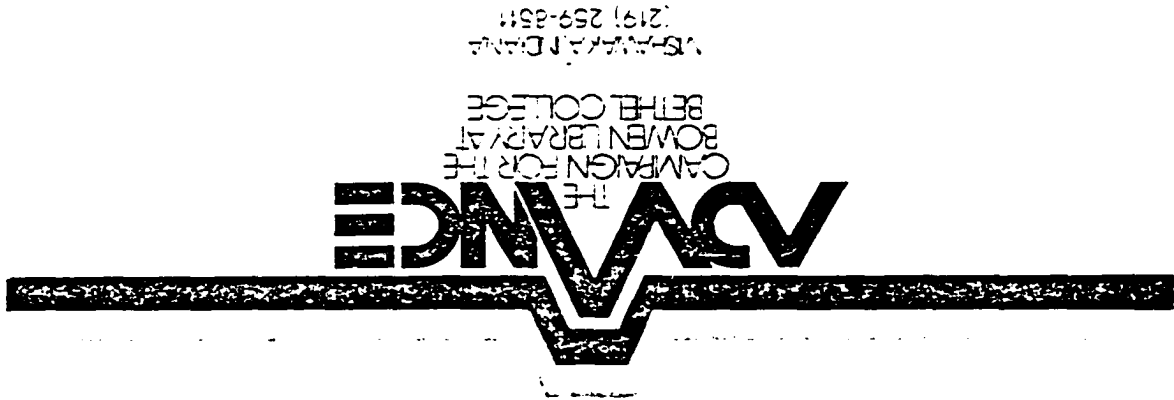
striving for the development of each person's full potential. These values are nurtured by Bethel's liberal arts education, and in the end, they make our society a better place in which to live and work.

And, up to 50% of your contribution to the Advance Campaign can be claimed as a tax credit against Indiana Gross Income Tax owed as well as a deduction on your federal income tax. Unlike deductions, tax credits are subtracted directly from the amount of tax you owe. Following are examples of the actual cost of your contribution:

Examples:

Single taxpayer, Individual Return	State Tax Credit	Net Cost to Donor
\$100	\$100	\$100
\$200	\$100	\$200
\$300	\$100	\$200
\$400	\$100	\$200
\$500	\$100	\$200
Married taxpayer, Joint Return		
\$200	\$100	\$100
\$300	\$150	\$150
\$400	\$200	\$200
\$500	\$200	\$300

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## MORE WAYS TO DONATE TO THE ADVANCE CAMPAIGN:

When we are asked to give to a charitable cause, we tend to think of cash giving only. But there are a number of other ways in which to give, and in doing so, both to invest in the ideals and philosophy of Bethel college and to realize considerable tax benefits. Here are a few of the options:

- \* TRUSTS
- \* MEMORIALS
- \* GIFTS IN KIND
- \* INSURANCE PLANS
- \* SECURITIES, REAL ESTATE
- \* BEQUESTS
- \* DONATIVE SALE
- \* MATCHING GIFTS
- \* DEPRECIATED PROPERTY
- \* PERSONAL PROPERTY

I would be pleased to receive Elizabeth A.  
Bowen Library at this time. Beth, I am  
enclosing my contribution for  
 \$25  
 \$10  
 \$50 (for the Book Club)

My name and address have been printed in  
below:

(Name)

(Address)

(City, State, Zip)

In addition to the contribution described on  
the back of this card

(Don't forget that this is a tax credit.)

I would be honored to help with the Advance Campaign to fund the Otis R. and Elizabeth A. Bowen Library at Bethel College.

To help fund this special tribute to Governor Bowen and to the memory of his wife, Beth, I am enclosing my contribution in the following amount:

- \$25 Supporter
- \$50 Sponsor
- \$100 Associate
- \$250 Patron
- \$500 Benefactor
- 1,000 Governor's Club
- Other \_\_\_\_\_

\*\*Please make checks payable to the Advance Campaign\*\*

My name and address should be listed as a contributor to the Bowen Library exactly as I've printed it below:

(Name)

(Address)

(City, State, Zip Code)

In addition to the enclosed contribution, I am considering an additional contribution as described on the back of this card. Please send me more information.

(Don't forget that your contribution to the Advance Campaign can be used as a tax credit.)

As a faith promise, and to assist Bethel College in the ADVANCE Campaign, I/we subscribe to the 1981-84 ADVANCE Campaign.



1001 West McKinley  
Mishawaka, Indiana 46545

(A cup of coffee for the college each day equals \$15 per month.)

Monthly pledge: \_\_\_\$15 \_\_\_\$20 \_\_\_\$25 \_\_\_\$30 \_\_\_\$40 \_\_\_\$50 \_\_\_\$75 \_\_\_\$100

Other: \$\_\_\_\_\_ TOTAL AMOUNT PLEDGED: \$\_\_\_\_\_ Beginning \_\_\_\_\_ (date)

Please charge above to my (our): Master Charge No. \_\_\_\_\_  
VISA No. \_\_\_\_\_

Signature of donor \_\_\_\_\_ Telephone # \_\_\_\_\_

Address \_\_\_\_\_

**APPENDIX C**

**SUPPORTING STATISTICAL DATA**

TABLE 18  
 FREQUENCY DISTRIBUTION  
 (Previous Gifts)

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
.000	252	84.0	84.0	18.500	1	.0	90.7
5.000	2	1.0	85.0	20.000	2	.7	91.3
5.500	3	1.0	86.0	25.000	4	1.3	92.7
10.000	4	1.3	87.3	28.500	1	.3	93.0
12.500	8	2.7	90.0	32.500	1	.3	93.3
15.000	1	.3	90.3	37.500	2	.7	94.0
50.000	6	2.0	96.0	125.000	1	.3	98.3
62.500	1	.3	96.3	175.000	1	.3	98.7
67.500	1	.3	96.7	212.500	1	.3	99.0
72.500	1	.3	97.0	225.000	1	.3	99.3
100.000	2	.7	97.7	300.000	2	.7	100.0
102.870	1	.3	98.0				

TABLE 19

**FREQUENCY DISTRIBUTION**  
(Expense)

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
1.720	158	52.7	52.7	6.530	1	.3	77.7
1.960	21	7.0	59.7	6.770	1	.3	78.0
3.030	3	1.0	60.7	6.910	1	.3	78.3
3.460	1	.3	61.0	7.110	1	.3	78.7
3.610	1	.3	61.3	7.250	1	.3	79.0
4.310	1	.3	61.7	7.460	1	.3	79.3
4.460	14	4.7	66.3	7.520	1	.3	79.7
4.710	6	2.0	68.3	7.790	1	.3	80.0
4.950	7	2.3	70.7	7.910	1	.3	80.3
5.020	7	2.3	73.0	7.980	1	.3	80.7
5.220	1	.3	73.3	8.020	1	.3	81.0
5.230	1	.3	73.7	8.190	1	.3	81.3
5.240	1	.3	74.0	8.410	1	.3	81.7
5.430	1	.3	74.3	8.470	1	.3	82.0
5.490	1	.3	74.7	8.560	1	.3	82.3
5.570	1	.3	75.0	8.800	1	.3	82.7
6.000	1	.3	75.3	8.820	1	.3	83.0
6.180	1	.3	75.7	9.150	1	.3	83.3
6.220	2	.7	76.3	9.310	1	.3	83.7
6.250	1	.3	76.7	9.350	1	.3	84.0
6.380	1	.3	77.0	9.470	1	.3	84.3
6.420	1	.3	77.3	9.600	1	.3	84.7
9.650	1	.3	85.0	38.710	1	.3	93.3
10.270	1	.3	85.3	39.410	1	.3	93.7
10.810	1	.3	85.7	44.200	1	.3	94.0
16.080	2	.7	86.3	47.260	1	.3	94.3
17.880	1	.3	86.7	51.220	1	.3	94.7
18.780	1	.3	87.0	56.760	1	.3	95.0
19.140	1	.3	87.3	59.090	1	.3	95.3
20.080	1	.3	87.7	59.500	1	.3	95.7
20.760	1	.3	88.0	60.220	1	.3	96.0
21.700	1	.3	88.3	60.620	1	.3	96.3
23.500	2	.7	89.0	74.190	1	.3	96.7
23.860	1	.3	89.3	77.780	1	.3	97.0
24.970	1	.3	89.7	88.280	2	.7	97.7
25.120	1	.3	90.0	89.200	1	.3	98.0
25.480	1	.3	90.3	93.900	2	.7	98.7
26.380	1	.3	90.7	123.780	1	.3	99.0
26.560	1	.3	91.0	147.730	1	.3	99.3
27.280	2	.7	91.7	159.060	1	.3	99.7
28.180	1	.3	92.0	221.990	1	.3	100.0
30.390	1	.3	92.3				
35.740	1	.3	92.7				
37.270	1	.3	93.0				



TABLE 20  
 FREQUENCY DISTRIBUTION  
 (Gifts Received)

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
0.	187	62.3	62.3	40.	3	1.0	73.7
10.	7	2.3	64.7	50.	20	6.7	80.3
15.	2	.7	65.3	60.	1	.3	80.7
20.	4	1.3	66.7	70.	1	.3	81.0
25.	14	4.7	71.3	75.	3	1.0	82.0
30.	4	1.3	72.7	100.	21	7.0	89.0
120.	1	.3	89.3	300.	3	1.0	95.0
125.	1	.3	89.7	375.	1	.3	95.3
150.	1	.3	90.0	400.	1	.3	95.7
180.	2	.7	90.7	450.	1	.3	96.0
200.	7	2.3	93.0	540.	11	3.7	99.7
250.	3	1.0	94.0	600.	1	.3	100.0

TABLE 21  
 FREQUENCY DISTRIBUTION  
 (Net Gifts)

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
-171.990	1	.3	.3	-4.510	1	.3	11.7
-97.730	1	.3	.7	-3.460	1	.3	12.0
-64.200	1	.3	1.0	-3.030	3	1.0	13.0
-59.060	1	.3	1.3	-1.720	158	52.7	65.7
-38.280	1	.3	1.7	-1.559	1	.3	66.0
-35.220	1	.3	2.0	-1.220	1	.3	66.3
-18.180	1	.3	2.3	.590	1	.3	66.7
-16.760	1	.3	2.7	.850	1	.3	67.0
-15.120	1	.3	3.0	1.140	1	.3	67.3
-12.280	1	.3	3.3	2.540	1	.3	67.7
-9.600	1	.3	3.7	2.740	1	.3	68.0
-9.470	1	.3	4.0	5.050	1	.3	68.3
-8.560	1	.3	4.3	8.040	2	.7	69.0
-8.410	1	.3	4.7	9.920	1	.3	69.3
-8.190	1	.3	5.0	10.350	1	.3	69.7
-8.020	1	.3	5.3	11.720	1	.3	70.0
-7.980	1	.3	5.7	13.040	1	.3	70.3
-7.910	1	.3	6.0	13.750	1	.3	70.7
-7.520	1	.3	6.3	14.980	1	.3	71.0
-7.250	1	.3	6.7	15.500	1	.3	71.3
-7.110	1	.3	7.0	18.040	1	.3	71.7
-6.910	1	.3	7.3	18.230	1	.3	72.0
-6.220	1	.3	7.7	18.470	1	.3	72.3
-6.180	1	.3	8.0	19.980	1	.3	72.7
-5.570	1	.3	8.3	20.050	1	.3	73.0
-5.490	1	.3	.7	20.290	1	.3	73.3
-5.240	1	.3	9.0	22.220	1	.3	73.7
-5.230	1	.3	9.3	23.040	5	1.7	75.3
-5.220	1	.3	9.7	24.520	1	.3	75.7
-4.710	5	1.7	11.3	25.050	1	.3	76.0

TABLE 21--Continued

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
25.810	1	.3	76.3	106.100	1	.3	90.0
28.040	2	.7	77.0	118.780	1	.3	90.3
28.300	1	.3	77.3	169.610	1	.3	90.7
31.180	1	.3	77.7	170.690	1	.3	91.0
31.110	1	.3	78.0	172.720	1	.3	91.3
33.920	1	.3	78.3	178.040	1	.3	91.7
39.240	1	.3	78.7	191.530	1	.3	92.0
39.380	1	.3	79.0	195.540	2	.7	92.7
40.910	1	.3	79.3	198.040	1	.3	93.0
43.620	1	.3	79.7	212.730	1	.3	93.3
44.980	2	.7	80.3	226.500	1	.3	93.7
45.050	1	.3	80.7	248.040	1	.3	94.0
45.540	4	1.3	82.0	291.200	1	.3	94.3
46.390	1	.3	82.3	294.000	1	.3	94.7
46.500	1	.3	82.7	295.540	1	.3	95.0
48.040	2	.7	83.3	370.050	1	.3	95.3
50.030	1	.3	83.7	389.190	1	.3	95.7
55.800	1	.3	84.0	416.220	1	.3	96.0
56.100	1	.3	84.3	444.570	1	.3	96.3
61.290	1	.3	84.7	513.620	1	.3	96.7
73.040	1	.3	85.0	520.860	1	.3	97.0
82.120	1	.3	85.3	530.650	1	.3	97.3
83.920	1	.3	85.7	532.210	1	.3	97.7
84.260	1	.3	86.0	534.980	1	.3	98.0
89.730	1	.3	86.3	535.050	1	.3	98.3
93.580	1	.3	86.7	535.540	2	.7	99.0
94.980	2	.7	87.3	538.040	2	.7	99.7
95.050	1	.3	87.7	598.040	1	.3	100.0
95.540	5	1.7	89.3				
98.040	1	.3	89.7				

TABLE 22  
**FREQUENCY DISTRIBUTION**  
 (Increases)

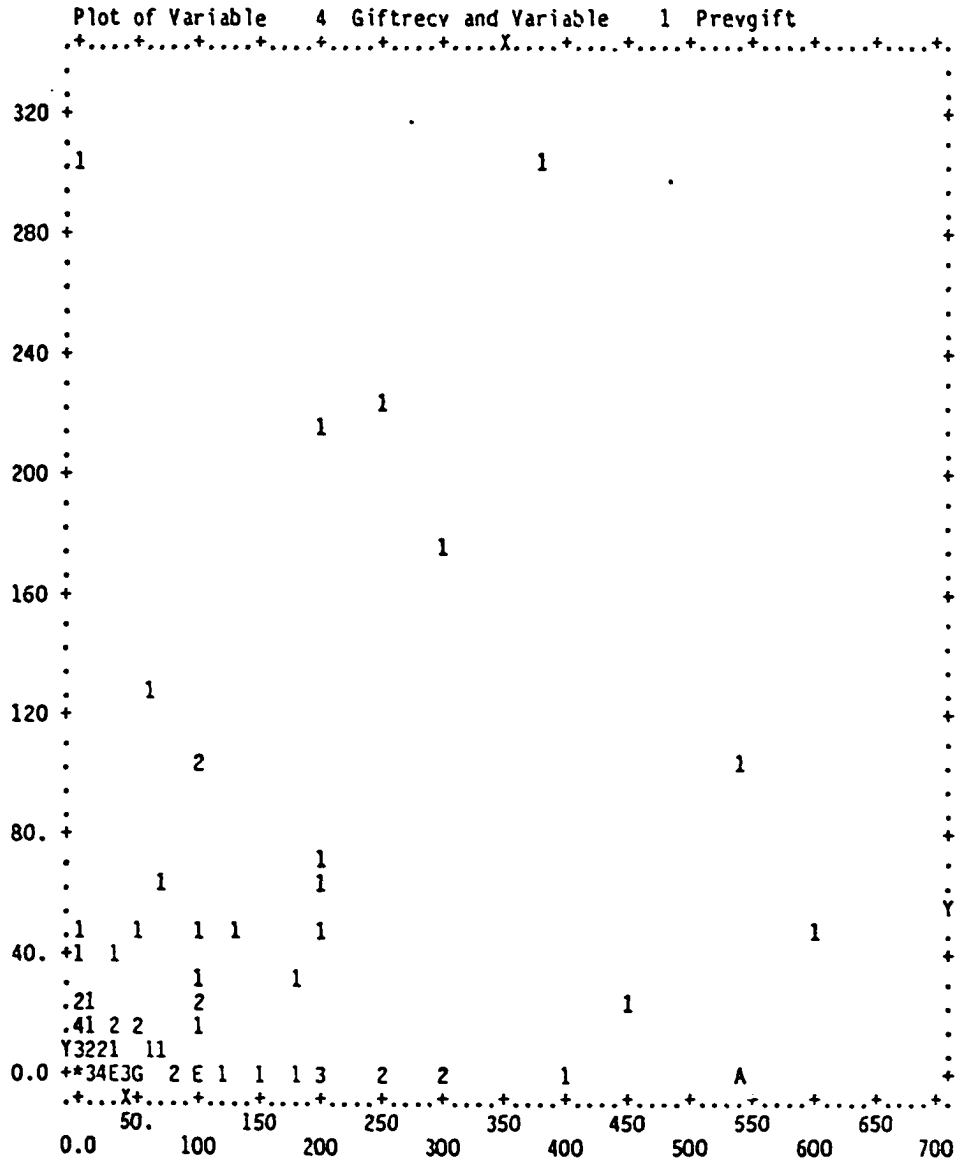
Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
-301.720	1	.3	.3	-6.220	1	.3	12.7
-296.990	1	.3	.7	-6.180	1	.3	13.0
-97.730	1	.3	1.0	-5.570	1	.3	13.3
-82.700	1	.3	1.3	-5.490	1	.3	13.7
-59.060	1	.3	1.7	-5.240	1	.3	14.0
-51.720	1	.3	2.0	-5.230	1	.3	14.3
-39.220	1	.3	2.3	-5.220	1	.3	14.7
-38.280	1	.3	2.7	-4.830	1	.3	15.0
-35.220	1	.3	3.0	-4.710	5	1.7	15.7
-28.180	1	.3	3.3	-4.460	1	.3	17.0
-26.720	2	.7	4.0	-4.310	1	.3	17.3
-25.120	1	.3	4.3	-3.610	1	.3	17.7
-20.970	1	.3	4.7	-3.460	1	.3	18.0
-20.480	1	.3	5.0	-3.030	3	1.0	19.0
-19.030	1	.3	5.3	-1.720	147	49.0	68.0
-16.760	1	.3	5.7	-1.560	1	.3	68.3
-14.220	3	1.0	6.7	-1.220	1	.3	68.7
-12.280	1	.3	7.0	.590	1	.3	69.0
-11.960	1	.3	7.3	.850	1	.3	69.3
-9.600	1	.3	7.7	1.140	1	.3	69.7
-9.470	1	.3	8.0	2.540	1	.3	70.0
-8.560	1	.3	8.3	2.740	1	.3	70.3
-8.410	1	.3	8.7	5.050	1	.3	70.7
-8.190	1	.3	9.0	5.540	1	.3	71.0
-8.020	1	.3	9.3	8.040	2	.7	71.7
-7.910	1	.3	9.7	9.920	1	.3	72.0
-7.520	1	.3	10.0	9.980	1	.3	72.3
-7.250	1	.3	10.3	10.250	1	.3	72.7
-7.220	1	.3	10.7	10.540	1	.3	73.0
-7.110	1	.3	11.0	11.720	1	.3	73.3
-6.960	1	.3	11.3	12.020	1	.3	73.7
-6.910	1	.3	11.7	13.750	1	.3	74.0
-6.720	2	.7	12.3	14.980	1	.3	74.3

TABLE 22--Continued

Value	Count	Percents		Value	Count	Percents	
		Cell	Cum			Cell	Cum
15.500	1	.3	74.7	82.120	1	.3	88.7
18.230	1	.3	75.0	83.920	1	.3	89.0
20.050	1	.3	75.3	84.260	1	.3	89.3
20.290	1	.3	75.7	94.980	1	.3	89.7
21.420	1	.3	76.0	95.050	1	.3	90.0
22.220	1	.3	76.3	95.540	3	1.0	91.0
23.040	4	1.3	77.7	106.100	1	.3	91.3
23.040	1	.3	78.0	110.220	1	.3	91.7
25.050	1	.3	78.3	119.000	1	.3	92.0
25.810	1	.3	78.7	123.040	1	.3	92.3
28.040	2	.7	79.3	138.190	1	.3	92.7
28.300	1	.3	79.7	148.040	1	.3	93.0
31.180	1	.3	80.0	169.610	1	.3	93.3
31.220	1	.3	80.3	178.040	1	.3	93.7
33.740	1	.3	80.7	195.540	1	.3	94.0
39.380	1	.3	81.0	212.730	1	.3	94.3
40.910	1	.3	81.3	226.500	1	.3	94.7
41.000	1	.3	81.7	291.200	1	.3	95.0
43.620	1	.3	82.0	295.540	1	.3	95.3
44.980	2	.7	82.7	389.190	1	.3	95.7
44.980	1	.3	83.0	416.220	1	.3	96.0
45.050	1	.3	83.3	419.570	1	.3	96.3
45.540	4	1.3	84.7	430.650	1	.3	96.7
48.040	2	.7	85.3	513.620	1	.3	97.0
48.790	1	.3	85.7	520.860	1	.3	97.3
50.030	1	.3	86.0	532.210	1	.3	97.7
55.800	1	.3	86.3	534.980	1	.3	98.0
56.100	1	.3	86.7	535.050	1	.3	98.3
64.730	1	.3	87.0	535.540	2	.7	99.0
65.080	1	.3	87.3	538.040	2	.7	99.7
68.780	1	.3	87.7	548.040	1	.3	100.0
70.050	1	.3	88.0				
75.540	1	.3	88.3				

Table 23

SCATTERPLOTS  
(Gifts Received and Previous Gifts)



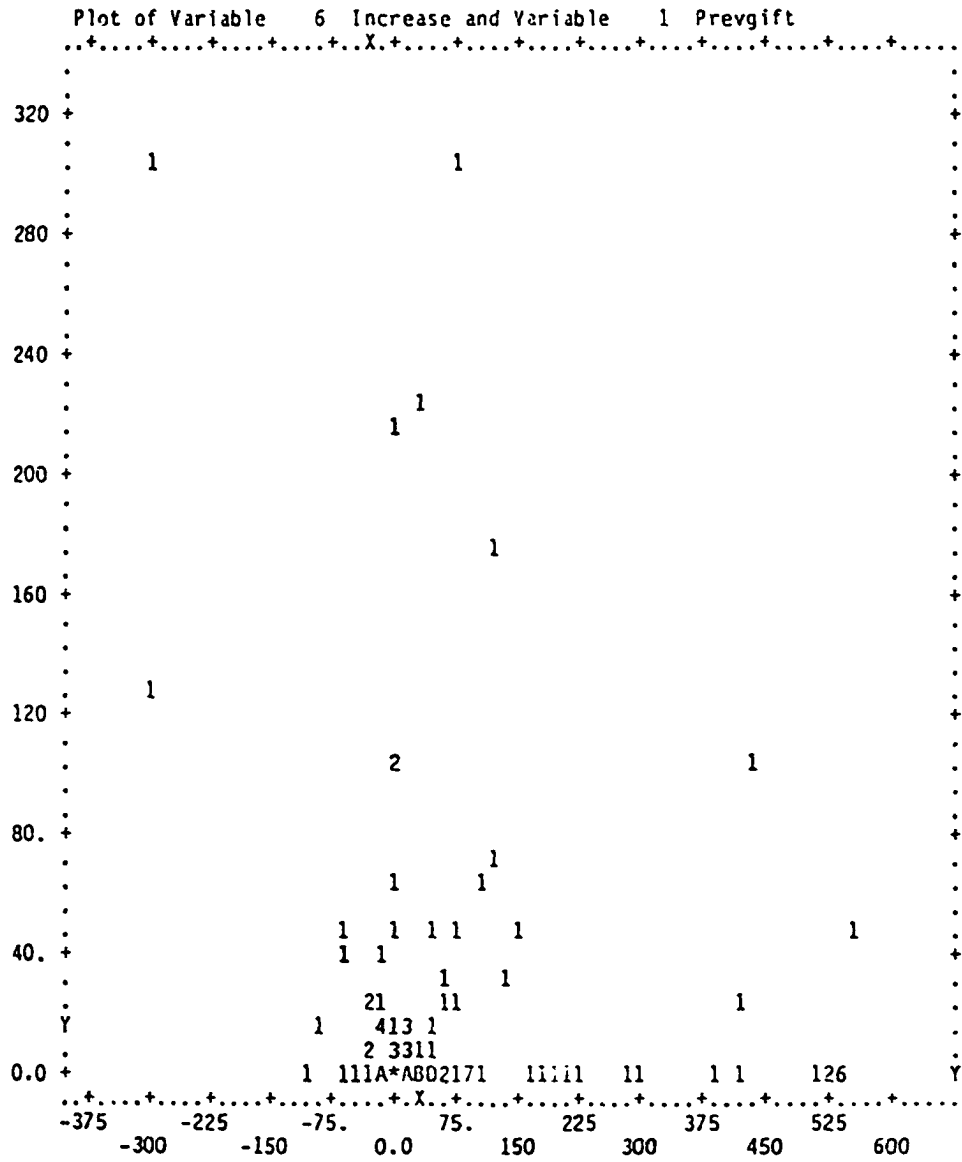
N= 300  
COR= .253

Giftrecv

	Mean	St.Dev.	Regression Line	Res.Ms.
X	52.649	121.30	$X = .87432 * Y + 45.002$	13816.
Y	8.7462	35.118	$Y = .07329 * X + 4.8877$	1158.1

Table 24

SCATTERPLOTS  
(Increases and Previous Gifts)

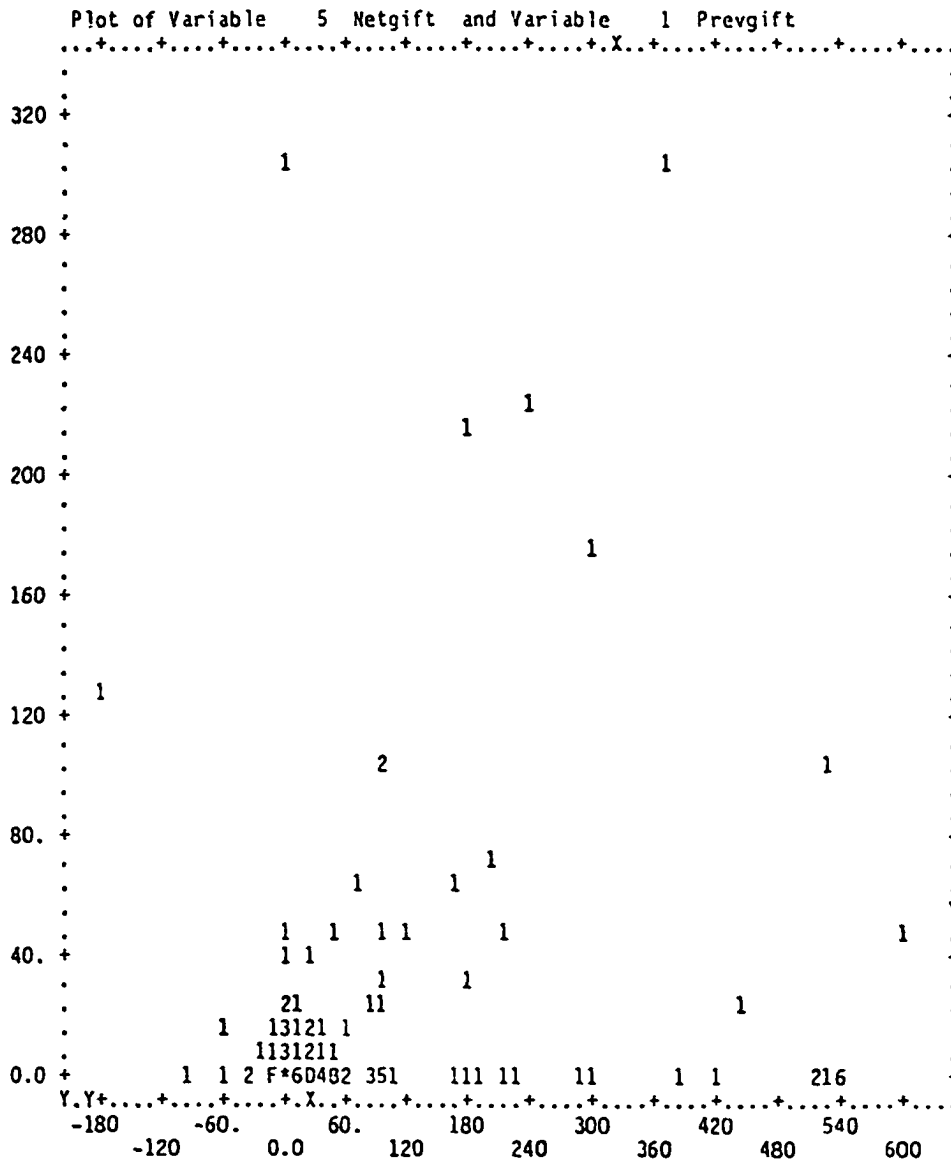


N= 300  
COR= .051

	Mean	St.Dev.	Regression Line	Res.Ms.
X	33.600	115.77	X=-.16889*Y+ 35.077	13413.
Y	8.7462	35.118	Y=-.01554*X+ 9.2683	1234.1

Table 25

SCATTERPLOTS  
(Net Gifts and Previous Gifts)



N= 300  
COR= .245

	Mean	St.Dev.	Regression Line	Res.Ms.
X	42.346	119.25	X= .83112*Y+ 35.077	13413.
Y	8.7462	35.118	Y= .07208*X+ 5.6938	1163.3



APPENDIX D

**EXPERIMENTAL DESIGN**

Table 26

## EXPERIMENTAL DESIGN

Random Sample	Past Gifts Records (Two Years)	Treatments*	Expenses Incurred	Gift Income
$R_1$	$O_1$	$X_1$	$E_1$	$O_2$
$R_2$	$O_3$	$X_2$	$E_2$	$O_4$
$R_3$	$O_5$	$X_3$	$E_3$	$O_6$
$R_4$	$O_7$	$X_4$	$E_4$	$O_8$
$R_5$	$O_9$	$X_5$	$E_5$	$O_{10}$
$R_6$	$O_{11}$	$X_6$	$E_6$	$O_{12}$

\*  $X_1$  = "Dear Friend" form letter

$X_2$  = Telethon

$X_3$  = Personalized letter

$X_4$  = Gimmick letter

$X_5$  = Incentive letter

$X_6$  = Personal visitation

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**Date of Birth:** 29 September 1944

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Mishawaka, Indiana  
-Assistant to the President  
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-Coordinator, Public Relations  
-Institutional Marketing  
-Basketball Coach

1976-82 Bethel College  
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