

# Jewish Family Service of Worcester, Inc.

## The Unique Marketing Challenges Faced by a Non-Profit, Social Service Agency

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## **Abstract**

Jewish Family Service of Worcester, Inc. is a non-profit social service agency located in Worcester, Massachusetts, providing a variety of counseling and other social services to support individuals and strengthen families in Central Massachusetts. There are several areas in which the agency can improve its marketing activities. Since it was discovered that fundraising accounts for only 4.84% of the total budgeted income for 2008, the majority of our analysis focuses on reviewing case studies and other literature that might suggest how Jewish Family Service can increase the amount of income received through fundraising and donor relations.

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## 1. Introduction

We have decided to review the marketing practices of a non-profit social service agency called Jewish Family Service of Worcester, Inc. (“JFS”), located at 646 Salisbury Street in Worcester, Massachusetts. JFS provides a variety of counseling and other social services to support individuals and strengthen families in Central Massachusetts. The mission of JFS is based upon traditional Jewish values of social responsibility and concerns for all members of the community and, as such, JFS serves those in need without regard to race, religion, or the ability to pay. (JFS Website, 2007.)

## 2. Background

This section is intended to furnish the reader with an understanding of the historical context in which JFS marketing practices are being examined. The history of the organization and the current services that the agency provides to the community are described through selected excerpts from the JFS website and various marketing materials.

### 2.1. History of Jewish Family Service

The United Jewish Charities (“UJC”) was formed by the merger of several private voluntary societies in 1919. The creation of this new group, which was done after significant community discussion and planning, allowed for some of the first welfare programs in Worcester to be created. These included the first “Free Milk Station” in Worcester, a well-baby clinic, and a dental clinic.

*“During the first 10 to 15 years of its existence, the primary function of the United Jewish Charities was to give financial or other material aid where needed.” (JFS Website, 2007.)*

The United Jewish Charities became associated with the Worcester Welfare Federation, which was the predecessor of the Worcester Community Chest, in 1920. A year later in 1921, the UJC received its first set of funding from the Federation. In the early 1930s the federal government instantiated the beginnings of Social Security Programs, leading to subsequent growth of more effective Public Assistance Programs. In this changing landscape, the UJC was able to concentrate and expand its counseling and therapeutic services as well as shift some focus to other vital health and welfare programs.

*“In 1938, the name United Jewish Charities was changed to the Jewish Social Service Agency [(“JSSA”)], which better reflected its changing functions and wider range of services.” (JFS Website, 2007.)*

Following World War II, there was a large influx of Jewish refugees immigrating to the Worcester area. From 1946 through 1952, the JSSA focused its energies on the tremendous task of resettling and rehabilitating these displaced migrants. Once completed, the JSSA Board of Directors and staff were actively dedicated to developing effective family and child counseling services for the Jewish community. Due to the shift in focus of the agency, it was felt that a new name was necessary to properly reflect the importance now placed on “service to families”. Therefore, the JSSA was renamed “Jewish Family Service of Worcester, Inc.” on November 1, 1957.

*“In 1971, Robert D. and Mary Ann Harrington donated their home at 646 Salisbury Street to the Worcester Jewish Federation to be used by the Jewish Family Service. In October, 1973, Jewish Family Service moved into its new quarters.” (JFS Website, 2007.)*

In the late 1970s and early 1980s, JFS created the first guardianship program in Massachusetts for adjudicated incompetent elderly. “In approving the implementation of this program, the Board of Directors mandated that the Agency be willing to step forward as a guardian of last resort for those elderly persons who could not function in the community and who had no relative or friend that could assume responsibility for their protection and well-being.” (JFS Website, 2007.) Further, JFS entered into a contract with the Office of Elder Affairs, providing up to 25 guardianships/conservatorships to Protective Service clients. This cutting edge service is still provided by JFS today.

“In the 1990s the Agency formed a Family Therapy Team to deal with divorce and reorganizing families. JFS began offering seminars in helping ‘Children Cope With Divorce.’ In 1995, the seminars were made mandatory by the probate court for all divorcing parents and JFS is a major provider of this service. Aside from the educational component, the seminars serve as a gateway to other services JFS offers such as individual and family therapy, groups for divorcing parents and children, and divorce mediation, a service we began in 1995. Mediation is now an approved ADR Program of the Probate and Family Court.” (JFS Website, 2007.)

Some of JFS’ monetary support is provided by the Jewish Federation of Central Mass, United Way of Central Mass, the Executive Office of Elder Affairs, Central Mass Agency on Aging, Mass Bar Foundation, and the Greater Worcester Community Foundation.

## 2.2. Services Currently Offered by JFS

The services that JFS currently offers include:

- Child, Adult, and Family Counseling;
- Mediation Services;
- Children Cope with Divorce Seminars;
- Geriatric Care Management;
- Elder Guardianship; and
- Adoption Services.

A brief description of each follows.

*Child, Adult, and Family Counseling:* “The goal of the JFS Child, Adult and Family Therapy Program is to restore or improve the sense of well-being and functioning of children, adults and families. The clinicians at JFS specialize in working with families and offer an approach that emphasizes the development of strengths and improved relatedness. We focus on treating the family, whatever its makeup, and we can address a wide range of problems with children, parents and adults. We provide a complete range of services to individuals and families, including nontraditional families such as those undergoing the transitions of divorce, remarriage, illness and loss. Families in transition have been found to put children at higher risk for mental health problems; therefore JFS has targeted early intervention with this population. Our clinicians treat individuals for problems such as depressions, anxiety, panic, OCD, eating disorders, symptoms related to traumatic experiences, etc. These not only effect the client’s mood, but often how they are doing at work, school or home.” (JFS Website, 2007 and JFS Marketing Materials, 2007.)

*Mediation Services:* “When ongoing conflict occurs in a family, a trained mediator helps the parties discuss the issues, explore options and create an acceptable agreement. The mediator remains neutral and helps the parties to develop their own solutions. Mediation can prevent more costly litigation in court and gives the participants more control over the terms of the final agreement. Mediation also promotes the development of improved conflict-resolution techniques. Mediation promotes cooperation among participants, making it more likely family members will stick to their agreement. JFS has a team of lawyers and social workers experienced in family law, family therapy and mediation. Parenting plans developed at JFS emphasize consideration of the children’s interests in achieving resolutions. JFS promotes the continued cooperation of the participants in implementing agreements. We assist families in developing skills to manage future disputes should they arise. The JFS Mediation Program is An Approved Alternative Dispute

Resolution (ADR) Program of the Worcester Probate and Family Court.” (JFS Website, 2007 and JFS Marketing Materials, 2007.)

*Children Cope with Divorce Seminars:* “Children Cope with Divorce is approved by the Massachusetts Probate & Family Court to fulfill the required parent education for divorcing families with children. The program is an affiliate of Families First of Atlanta, Georgia, ‘Transparenting’ Program. Separation and divorce are stressful for children, putting them at higher risk for depression or behavioral problems. Most kids, with the help of their parents, will adjust to living in a two-household family. This six-hour educational program for parents focuses on the needs of children during this challenging time of disruption and transition. Participants learn how children experience divorce and how to minimize the negative effects of divorce.” (JFS Website, 2007 and JFS Marketing Materials, 2007.)

*Geriatric Care Management:* “Licensed social workers provide services to meet the needs of frail older adults, working with them and their families to develop appropriate plans, assisting them in obtaining and coordinating needed services, and then monitoring their well-being.” (JFS Website, 2007.) “A geriatric care manager (GCM) is a professional, such as a social worker, counselor, nurse or gerontologist who specializes in assisting older people and their families to attain the highest quality of life given their circumstances. The GCM is trained to assess an elder’s needs, abilities and most importantly, an elder’s ability to care for him or herself.” (JFS Marketing Materials, 2007.) The GCM assessment includes factors such as living arrangements, social support, psychological well-being, financial/legal arrangements, and medical care. Based upon this assessment, JFS is able to provide assistance with: arrangement of living situations and community services; mental health counseling; and coordination of care.

*Elder Guardianship:* “Guardianship for elders involves the interface of medical, legal, financial and social services matters. JFS is appointed by the Probate and Family Court of Massachusetts as guardian of last resort for vulnerable elders who are no longer competent to make their own decisions. The cognitive deficits of these individuals are a barrier to accessing appropriate healthcare and living situations, and to taking care of their own needs. JFS assumed its first legal guardianship of elders in 1982 as the first social service agency in Massachusetts to provide this service. As legal guardian, JFS is responsible for making decisions on the ward’s behalf, based on what the ward would have decided were he/she competent, or in the best interest of the elder.” (JFS Website, 2007 and JFS Marketing Materials, 2007.)



Adoption Services: “JFS of Worcester is licensed by the Massachusetts Department of Early Education and Care. JFS provides services to all participants in the adoption arena, including children, birth parent, adoptive parent applicants, adoptive parents and adult adoptees.” (JFS Website, 2007.) Even after the adoption has occurred, JFS continues to provide related services. These include counseling, support group, and adoption information and education. Referrals are also made as necessary to other agencies and adoption support organizations. (JFS Marketing Materials, 2007.)

### 3. The Current Situation

Upon learning of our desire to perform an analysis of marketing activities at Jewish Family Service, the organization responded with enthusiasm, inviting us to visit the location, meet with staff, and to attend a Strategic Planning Committee meeting, at which the general concepts of marketing and fundraising were discussed. Conversations with the Executive Director revealed that while JFS is primarily focused on the extensive and well-developed services that they provide to the community, they have also been looking into improving their current management practices. Recently the agency received a grant to hire a strategy and management consultant who is working with JFS management to strengthen leadership practices and board involvement.

In keeping with their recognition of the importance of management skills, JFS has also expressed a desire to strengthen current marketing practices. Our Jewish Family Service contacts expressed uncertainty regarding their current marketing efforts, admitting that the organization has been struggling to develop an official marketing strategy. Fundraising efforts seem to be primarily geared towards a stagnant pool of donors, many of whom represent current and former board members. The remainder of this section takes a look at the current marketing practices and environment at JFS and attempts to identify some areas requiring improvement.

#### 3.1. A Look at the Current Budget

Most non-profit organizations have a very tight budget and struggle to properly allocate their funding. As such, the budget for a non-profit can demonstrate a lot about the attitudes and strategies of the organization. Examining the current fiscal year 2008 budget for Jewish Family Service reveals some interesting facts. (JFS Budget, 2007.) We generated a couple of charts from this information to highlight some key points and areas of interest.

Figure 1 shows all of the sources of income budgeted for 2008, totaling \$1,179,529, with their corresponding dollar amounts and percentage of total income. These sources can be grouped together into 5 categories: Fundraising; Other Direct Public Support; Indirect Public Support; Program Service Revenue; and Miscellaneous Income.

Fundraising is conducted by JFS and is comprised of donations and gifts given directly to the agency. Other Direct Public Support contains items such as grants applied to by JFS to be used for specific purposes, such as the guardianship program and child and family counseling. Indirect Public Support is also known as “federated giving”. Someone donates to United Way or Jewish Federation and that agency decides how best to distribute the money. This is becoming less popular, as many donors prefer to make their own decisions about what charitable organizations to support. (JFS Executive Director, 2007.) Program Service Revenue encompasses government grants given to JFS in support of specific programs such as elder guardianship as well as fees generated by the various programs (such as counseling and guardianship). Miscellaneous Income includes other sources of income that do not neatly fit into another category, such as “note card sales” and fees from a JFS sponsored educational conference. (JFS Budget, 2007.)

Other Direct Public Support accounts for \$151,250 (12.82%) of total fiscal year 2008 budgeted income. Indirect Public Support accounts for \$166,428 (14.11%). Program Service Revenue accounts for the majority of income with \$796,150 (67.50%). Miscellaneous Income accounts for \$8,600 (0.73%). **Fundraising accounts for only \$57,100 (4.84%) of the total budgeted income for 2008.**

Figure 2 shows the total budgeted expenses for fiscal year 2008, totaling \$1,176,165. These sources of expense have been grouped together into 6 categories: Postage; Bulk Mail Preparation; Printing and Publications; Books and Pamphlets; Marketing; and All Other Expenses. Each category is shown with its corresponding dollar amount and percentage of total expenses.

The “Marketing” line item in the budget is vague and it is difficult for both us and the agency to explain exactly what is included in this category. However, even in its ambiguous state, it accounts for only \$3,700 (0.3%) of the total fiscal year 2008 budgeted expenses.

Further, while the categories Postage, Bulk Mail Preparation, Printing and Publications, and Books and Pamphlets are self-explanatory, only a certain percentage of each of these categories should be

attributed to marketing activities. However, since it is difficult for JFS to explain this breakdown, even if we allocate 100% of these “possibly marketing” expenses as marketing-related, the combination of the Marketing line item and the “possibly marketing” line items accounts for only \$31,425 (2.6%) of the total 2008 expenses.

All Other Expenses includes salaries, benefits, building expenses, etc. and accounts for \$1,144,739 (97.3%).

FY08 Fundraising as Percentage of Total Income Budget

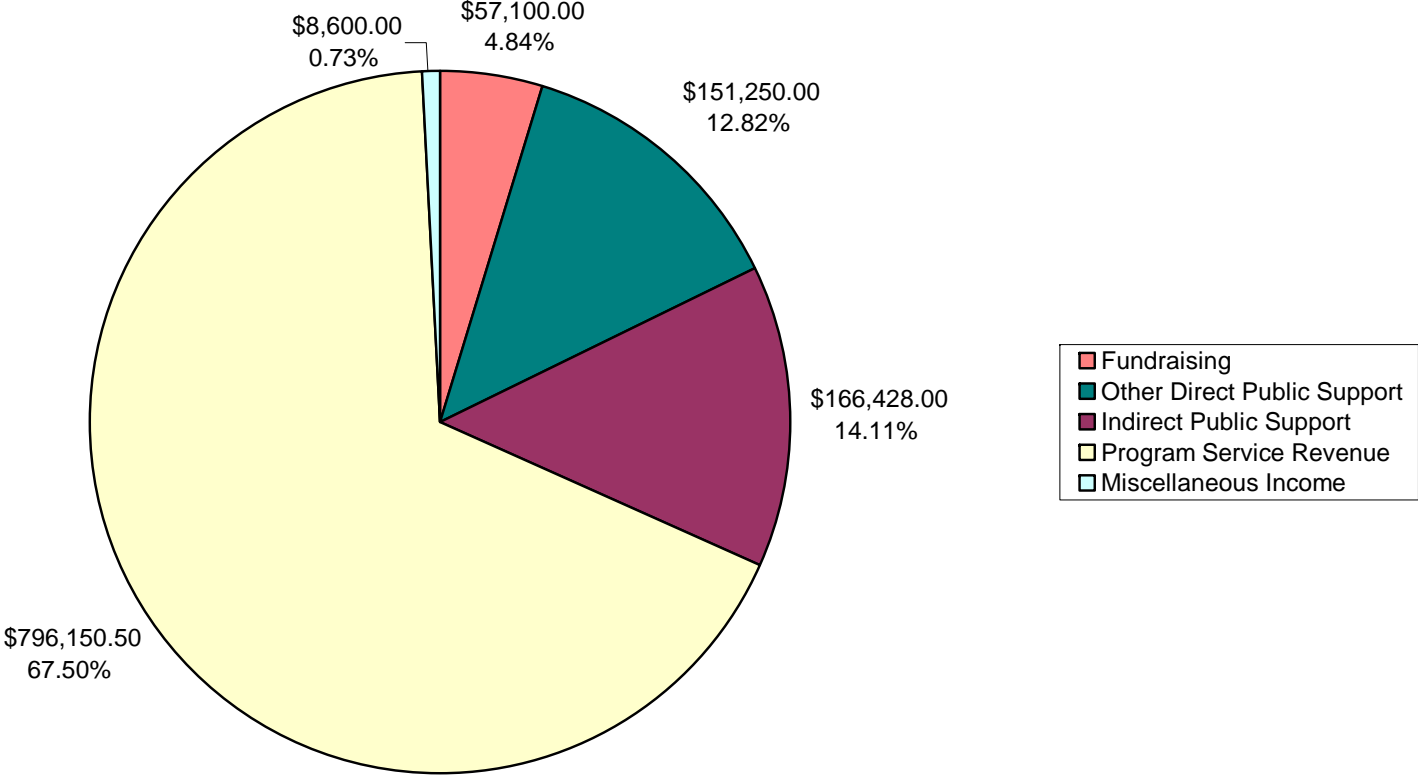


Figure 1 – FY08 Fundraising as Percentage of Total Income Budget

FY08 Total Expenses Budget  
(100% of "possibly marketing" expenses)

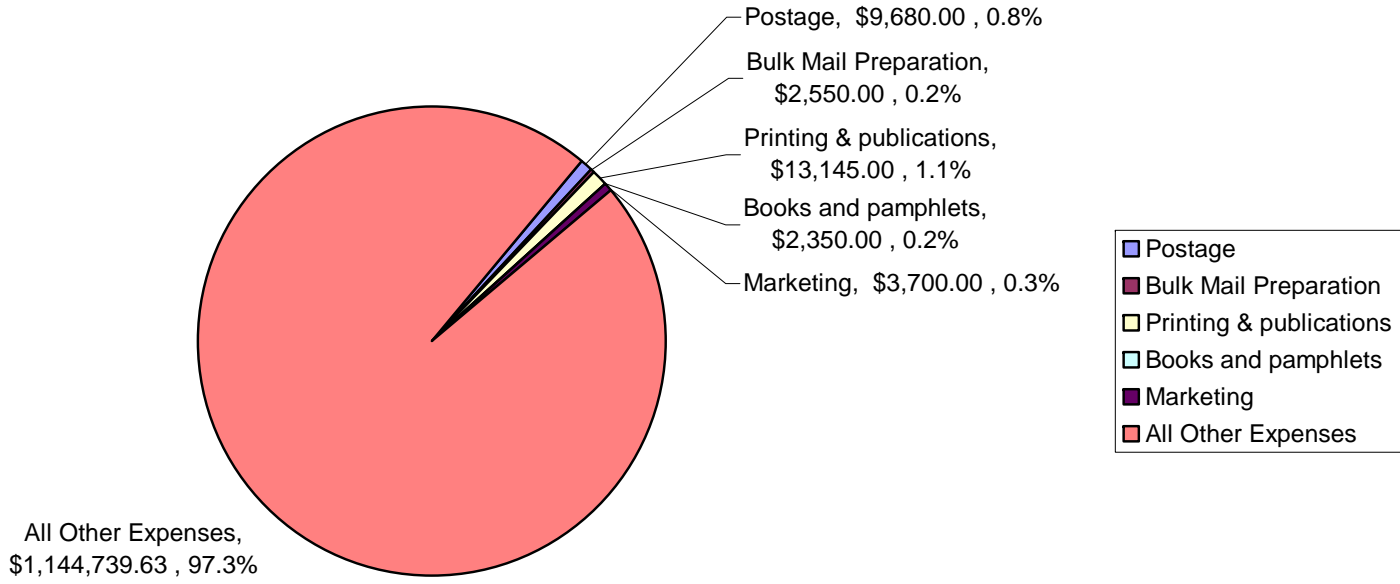


Figure 2 – FY08 Total Expenses Budget (100% of “possibly marketing” expenses)

### 3.2. Current Marketing Efforts and Concerns

Jewish Family Service currently has some informal and incomplete marketing in place. Most of it is at a tactical level (low-level, very specific) and very little of it is at a strategic level (high-level, coherent, agency-wide marketing strategy). This section presents some of the current state of both the tactical and strategic marketing that JFS is currently utilizing and highlights some areas of concern.

First, it is important to understand the structure of the agency. The daily operations of JFS are run by an Executive Director (Stephen Slaten, Ph.D.), Director of Administrative Services, Director of Fiscal Services, and Director of Fund Development. In addition, the professional services are provided by a mix of approximately 20 full-time and part-time licensed and experienced counselors, lawyers, therapists, social workers, etc. The Board of Directors is entirely composed of approximately 15-20 volunteers from a wide-range of professions including attorneys, accountants, physicians, counselors, social workers, engineers, and teachers. The general Board meeting occurs once a month, with sub-committees meeting as needed. The agency does not have any staff in the fields of information technology and marketing.

A significant worrisome finding is that JFS does not currently have a written marketing plan. Resources have been primarily dedicated to developing and managing the services offered by the agency. A large part of the reason for the lack of a formal marketing plan seems to stem from a feeling of insecurity related to developing and managing marketing strategies. The staff does not possess much formal marketing experience and the agency does not know where to begin with such an endeavor. Related to this issue, is the fact that the budget does not have an appropriate allocation of funding for marketing activities. The vague concept of marketing that the agency currently holds is superseded in the interest of using funding to help more people. It seems that JFS lacks both a good understanding of the marketing efforts that are most suitable for the agency, as well as how to properly allocate money to pay for them.

Another strategic level issue is that Jewish Family Service currently does not have any comprehensive performance metrics for both the agency in general and for the specific services offered. JFS has not developed official methods of gathering and analyzing significant data for purposes of maintaining quality, demonstrating quality, and making guiding decisions for the agency and programs.

JFS does have an attractive array of informational brochures which discuss the agency and the various programs available. Within the past couple of years a comprehensive website has also been developed and kept relatively up-to-date. However, there are some issues related to lack of consistent look and feel that need to be addressed. The messaging in the various marketing materials can also be clarified and made more succinct in some cases.

More recently the agency, and specifically the Board of Directors, has been concerned about branding issues related to the name “Jewish Family Service”. They feel that the name can be misleading, where some clients and donors may think that the agency is only Jewish people helping other Jewish people, when in fact approximately 85% of the people receiving services from JFS are non-Jewish. Not being cognizant of this fact may lead to clients feeling unwelcome and non-Jewish prospective donors may want to focus their charitable efforts on people of their own non-Jewish background. At the same time though, the name Jewish Family Service of Worcester carries a certain level of high-regard and is synonymous with high-quality, cutting edge social service assistance. The agency has not determined how to properly balance this potential branding problem.

As highlighted in the section that reviews the fiscal year 2008 budget for JFS, fundraising accounts for only \$57,100 (4.84%) of the total income of the organization. Since this is the most under-developed and under-utilized source of income, there needs to be an increase in the amount of charitable donations made directly to the agency. Methods for increasing the amount of giving by previous donors, recovering lapsed donors, and increasing the donor pool needs to be addressed. Related to these crucial activities is employing the use of a system to intelligently track and manage donors (current, lapsed, and potential). At present JFS uses an online subscription-based service called eTapestry.com.

Jewish Family Service is in the process of completing a fundraising mailing effort aimed at a donor pool of approximately 700 households. According to the Director of Fund Development, all of these households have previously donated to the agency within the past four years. This solicitation is being accomplished through the use of three different targeted letters for: 1.) donors who gave last fiscal year, but have not given this fiscal year; 2.) donors that gave in years past but have not given either last fiscal year or this fiscal year (not in the past 18 months); and 3.) donors who already gave a gift this year, encouraging a second gift if possible. Out of the 700 households targeted, 130 individuals have already made donations this year, totaling roughly \$28,200.

According to the Executive Director, the volunteer Board of Directors accounts for approximately 40%-50% of the \$28,200 raised so far.

Donor appreciation activities usually consist of a couple of different things. According to the Director of Fund Development, “Donor Thank You Phone-athons” are a JFS tradition in which board members volunteer their time to call those who have contributed over the year to thank individuals for their support. She says that it has proven to be a wonderful opportunity to personally touch base with contributors, get some feedback on the agency, and express a few words of gratitude. It has also impressed donors that board members are so engaged in the agency as to thank them personally.

Other donor appreciation events take place in the form of appreciation dinners with entertainment. Food, beverages, and some form of entertainment are provided as a way of expressing gratitude towards donors and JFS staff. Some of these events have consisted of dessert with a presentation by the Executive Director illustrating how donors’ gifts will be used to initiate and/or benefit certain programs.

#### 4. Analytical Review of the Current Situation

There are a few areas in which JFS’ marketing strategy can be improved. However, given the surprising fact extracted from the budget, that fundraising accounts for only \$57,100 (4.84%) of the total budgeted income for 2008, we decided to focus our efforts on reviewing case studies and other literature that might suggest how Jewish Family Service of Worcester can increase the amount of income received through fundraising. This is a complex problem that involves factors such as learning how to interact with current, previous, and prospective donors, increasing the donor pool, engaging in marketing techniques that elicit the desire to donate, and allocating appropriate funds and resources for marketing efforts.

Based on emerging trends for the 21st century, it has been predicted that donor-focused organizations will be the most successful. (Martin, Del, 2001.) It has also been proposed that competition for funding will continue to increase based on factors such as a slowing economy, redefined government funding and more selective private donations. (Sabor, Susan E. and Ripps, Daniel, 2001.) Based on these predictions, it can be argued that focusing on donors and on donor fundraising efforts will prove to be an effective strategy in working toward the success of a non-profit organization.



#### 4.1. History of Non-Profit Organizations in America

Today, charitable organizations have become a sophisticated and important part of American economy. Approximately 1.3 million charities and foundations are responsible for channeling millions of dollars to funding sites all over the world. (Panel on the Nonprofit Sector, 2005.) It has been estimated that nine of out every ten American households make charitable contributions, with individual donations totaling in excess of \$207 billion. (Panel on the Nonprofit Sector, 2005.) The 2003 final report from the Panel on the Nonprofit Sector comments on the breakdown of funding for non-profit organizations. While the statistics vary greatly between organizations, it is important to note that individual contributions make up an estimated 17 percent of funding. Andreasen cites an estimate that individual contributions in 2000 totaled \$152.07 billion, representing 75% of the total amount of charitable money that was raised.

In their book entitled *Strategic Marketing for Nonprofit Organizations*, Andreasen and Kotler show how the evolution of non-profit organizations has largely been governed by the social climate in which they exist. (Andreasen, Alan and Kotler, Philip., 2002.) Borrowing from Rosenbaum's work, they describe four distinct stages of development undergone by non-profit organizations in America: (1) civic model, (2) philanthropic patronage, (3) rights and entitlements and (4) the competitive/market stage. (Rosenbaum, Nelson, 1984.) These are considered in the following paragraphs.

From the beginning of American history to the early 1900s, the concept of charitable giving was preserved by the goodwill of individuals. In the absence of government benefits, volunteerism drove charity efforts and communities would often support their own members through goodwill *civic efforts*. During the industrial revolution, the concept of *philanthropic patronage* arose when many successful families prospered to the point that they could donate large sums of money to charities. By the mid 1900s, government had expanded to provide social welfare programs which extended to non-profit organizations. During this time, charity organizations could claim government funding on the basis of *rights and entitlements*.

Prior to the 1960s, strategic marketing and management played a nominal role within non-profit organizations, which had subsisted mainly through accepting the charity of others. (Andreasen, Alan and Kotler, Philip., 2002.) By the late 1900s, non-profits had arrived at what Rosenbaum refers to as the *competitive/market stage*, wherein government and personal support were no longer guaranteed sources of funding. Consequently, public and private competition for funding increased

dramatically. This, together with fast evolving public needs, economic uncertainties and limited resources, necessitated a focus on marketing and management strategy for non-profit organizations. In 1969, Kotler and Levy addressed this state of affairs, pointing out that non-profits, as well as for-profit organizations, needed to concentrate more efforts on marketing. (Kotler, Philip and Levy, Sidney J., 1969.) Due to changing social and economic conditions, marketing has now become an essential component to the success of a non-profit organization.

#### 4.2. Non-profit Marketing Strategy – A Balancing Act

It is apparent that finding the balance between the mission of the organization and the fundraising that helps to ensure the continuation of program and service offerings can be a difficult task. Because those who directly benefit from non-profit charity are seldom able to supply financial reimbursement, non-profits must obtain funding through other means. (Okten, Cagla and Weisbrod, Burton A., 2000.) In addition to receiving grants and organizational support, many non-profits rely heavily on the generosity of individual donors. This situation demands a complicated balance of marketing both to clients and to donors. In keeping with their stated mission, non-profits must remain focused on the needs of their constituencies, identifying actions and services that best meet those needs. However, non-profits must also focus on the needs of the donor population.

While the need for strategic management and marketing of non-profit organizations is not up for debate, it is often overlooked. At the time that marketing theory for non-profits was being investigated, it was a groundbreaking concept. Many non-profits responded with concern and doubt, maintaining that their main purpose was helping others, not advancing their own agendas. (Faherty, Vincent Edward, 1985.) Faherty describes an attitude of unwillingness to devote precious resources to what may appear to be secondary, unessential components of the organization. McMurtry et al comments on apprehensions that organizational considerations, rather than the needs of the clients, may drive the social service efforts of non-profits. (McMurtry, Steven L.; Netting, F. Ellen; and Kettner, Peter M., 1990.) Further, many non-profits such as JFS do not have the resources necessary to hire marketing professionals, and may be reluctant to engage in marketing practices with which they are not familiar.

#### 4.3. Knowing Your Clients

One indicator of a healthy social service organization is its ability to perceive and respond to the needs of the community. (Faherty, Vincent Edward, 1985.) Faherty comments on the necessity for social service program offerings to be flexible, changing according to the varying needs of the

community. He cites a familiar analogy, pointing out that a “horse carriage company will go out of business as soon as the automobile is invented”—unless, of course, the company redefines itself to be in the “people moving business.”

We feel that JFS has done an exceptional job of perceiving and effectively addressing the changing needs of the Worcester community. Its figurative “horse carriage” days, were characterized by outreach to a primarily Jewish population during the 1940s. However, JFS has always been primarily interested in servicing the community and has responded to changing social needs with programs and services tailored to suite all members of the community “regardless of race or religion”. Therefore, changes in the perceived needs of the community have led to a complete restructuring of JFS’ program and service offerings. In fact, JFS has, on more than one occasion, set the standard with innovative, cutting edge service offerings. A good example is the “Children Cope with Divorce” seminar offering, the importance of which was later recognized by the probate court, which mandated the seminar for all divorcing parents.

Given JFS’ ability to perceive and respond effectively to the needs of the community, it is clear that the organization understands the important role that client feedback and community awareness plays in marketing. However, whether JFS has been able to convey the value of their services to donors is another question. If we take a look at the budget, we can see that donor support comprises a very small portion of the entire revenue for the organization. This shows that while JFS is effectively serving the needs of the community, they have not been able to convince potential donors of their ability to do so.

#### 4.4. Engaging Your Donors

One essential aspect of effective fundraising is knowing your donors, their needs and their expectations. Much research has been dedicated to donor behavior, looking at motivations for giving, reasons for donor lapse, and effective strategies for attracting committed donors and maintaining donor relationships. In separate pieces, Andreasen and Bryce both emphasize the contractual nature of the agreement between donors and non-profit organizations. (Andreasen, Alan and Kotler, Philip., 2002.) (Bryce, Herrington J., 2007.) Donors expect to receive something in exchange for their support, such as social improvements or community recognition. Andreasen and Kotler point out that many non-profits make the mistake of marketing to donors based on the *organization’s* needs rather than the needs of the *donor*. For a customer-focused organization,

fundraisers must first identify the needs and wants of the donors and then show them how these same needs can be fulfilled through supporting the organization.

Citing Hart (1997), Bryce notes that contracts made with non-profits tend to be vague or intangible, and consequently require a higher level of trust on the part of the donor. (Bryce, Herrington J., 2007.) Most donors need information regarding why their donation is valuable and what benefits it will ultimately provide for the community. (Okten, Cagla and Weisbrod, Burton A., 2000.) It is incumbent upon the non-profit organization to provide potential donors with information relative to the extent and quality of their services. While inexpensive mailings and promotions can be an effective means of distributing information, more creative, hands on fundraisers can help to ensure that the organization has connected with potential donors in a meaningful way. However, Okten and Weisbrod caution that organizations should consider the high cost of such fundraisers, which may ultimately lead to decreased revenue.

Of utmost important is the ability to identify a donor's motivation for contracting with a non-profit organization, i.e. why they chose to give, and what benefits they expect in return. It is this knowledge that can help non-profits to satisfy the needs of donors, as well as the beneficiary public. Andreasen and Kotler list several motivations for donor giving, including the need for self-esteem, habit, and true concern for humanity. (Andreasen, Alan and Kotler, Philip., 2002.) Research shows that the most predominant reason for giving is that the values of donors are aligned with those of the organization. (Bryce, Herrington J., 2007.)

Romasco separates donors into three distinct groups which he refers to as active, lapsed and potential. (Romasco, Robert, 1983.) Lapsed donors are most likely represented in the organization's database and as such are fairly easy to contact through mailings. However, Romasco cautions that while recapture mailings may be effective, the ultimate goal of an organization should be to identify why lapsed donors discontinued their giving. He suggests several methods for following up with lapsed donors including telephone interviews and questionnaires. Valuable information obtained from these kinds of studies can be useful in directing future mailings and fundraiser events. For example, a JFS lapsed donor questionnaire may reveal that donors are not familiar with all of the services offered by JFS. In response, JFS may decide to target this audience with a mailing that succinctly describes each JFS service in an engaging fashion.

Marketing efforts must take into consideration varied types and giving abilities of donors. (Andreasen, Alan and Kotler, Philip., 2002.) An organization can connect more effectively with a specific target audience by segmenting donors into specific categories. A significant amount of research pertaining to donor demographics has been conducted, revealing interesting trends that help to classify donors according to their motivations for giving and their giving potential. This information should be utilized to give an organization better, more refined control of donor mailings and relations. For example, Miranda points out that Latino and African American populations are likely to play an increasing role in fundraising due to a shift of wealth. (Miranda, Ron, 2003). Targeting these populations by understanding the giving implications of new wealth can help to guide an organization's fundraising efforts.

#### 4.5. Creative Fundraising

Ultimately, in the words of Seattle consultant Bill Toliver, the goal of fundraising should not be getting people to act, but “[getting] them to commit.” (Hoye, Sue, 2007.) While informational brochures may be interesting to prospective donors, they are not necessarily able to connect with donors in the same way as direct communication and word of mouth fundraising. The following section describes some creative means for engaging potential donors in a meaningful way.

With the rapid evolution of technology many new approaches to fundraising have been made possible. Hagenbuch describes an online fundraising tool that several organizations have found to be tremendously helpful. Personal fundraising is a program that allows individuals committed to the organization to launch mini fundraising campaigns through their personal websites. (Hagenbuch, Dana, 2007.) The idea is simple: using a technical platform supplied through the organization, individuals can post a link to the organization on their website and then invite their own contacts to participate in giving. This strategy ensures that the benefits of the organization are presented to potential donors by their own friends and family, making the message more personal. An additional benefit to this method is that the donation process can easily be streamlined, allowing people to give directly online. JFS could consider offering a link for families of adopted children to post on their website. These families could then describe the services offered by JFS in their own words to their own contacts.

The fundraising method described above touches on the importance of word of mouth marketing. Channeling the enthusiasm of committed supporters of the organization can be an inexpensive and highly effective way to influence potential donors. (Hall, Holly, 2006.)

#### 4.6. Case Study – American Cancer Society

We feel that the market planning process used by the American Cancer Society has some meaningful applications for Jewish Family Service. In the early 1980s, Daniel Hansler, then the vice president for development at the California division of the American Cancer Society (ACS), published an article in *Fundraising Management* which outlined the ACS' market planning process. (Hansler, Daniel F., 1983.) The ACS is a successful, community based voluntary organization devoted to research, prevention, support and detection of cancer. In 2005, the ACS allocated \$605 million toward cancer research and support services. An additional \$261 million was allocated for supporting services. Of this amount, 22 percent, or \$190 million was allocated toward fundraising. (American Cancer Society, 2007.) The following section investigates the marketing principles that have made the ACS so successful.

Hansler identifies four essential components of developing a successful fundraising market plan. These include (1) situation analysis, (2) market research, (3) problems/opportunities analysis and (4) future market conditions. Situation analysis involves analyzing the current fundraising situation, categorizing all fundraising efforts, and identifying relationships between effort and return. A statistical analysis of the effectiveness of fundraising activities should be completed. In light of this suggestion, JFS may want to consider creating a Fundraising Task Force to compile all fundraising data. Metrics for determining effectiveness could be established and used to evaluate each fundraising method.

Second, Hansler recommends that market research be undertaken for the purpose of better understanding donors, their demographic characteristics, and their reasons for giving. For JFS, this could mean creating an extensive donor database with fields for recording information such as how donors heard about JFS, what service or program they are specifically interested in supporting, what made them decide to donate and what, if any, feedback they would be interested in receiving from JFS. This information could be used to plan future communications with current donors and to identify the demographics of the new donor target market.

An analysis of problems and opportunities is, in essence, a summary of the situation analysis and market research previously described. The purpose of this analysis is to investigate all of the factors that affect the current situation and to reveal new possibilities for future action. JFS may

consider holding a series of fundraiser meetings to review current data and brainstorm new ideas for effective fundraising.

The fourth component recommended by Hansler has to do with identifying future market considerations that will most likely influence the organization's marketing activities. JFS is currently in the process of creating an extensive environmental summary, which takes into consideration factors such as local demographics and political and social trends. Such information should be carefully reviewed and taken into consideration when developing a marketing plan.

## 5. Conclusions and Recommendations

As Kotler insightfully pointed out, all organizations engage in some form of marketing. (Kotler, Philip, 1979) Whether or not they are aware of how their marketing efforts fit into a larger management context is another story. Despite the fact that JFS lacks the trained personnel and professional expertise to develop a formal marketing plan, they have been able to implement some elements of good marketing practices. We feel that it would be most helpful at this point to suggest some preliminary steps toward developing and maturing the strategies they have already investigated. We speculate that simply having a better defined understanding of how marketing efforts fit into the overall strategy of the organization will help to remove the current insecurities and encourage the agency to embrace the kind of market-oriented focus that is necessary for continued and increased success.

As suggested by many of the materials referenced in this paper, an important first step toward developing a marketing plan is the formation of long- and short-term goals. We recommend that JFS develop goals in the area of donor relations and fundraising. For example, a long-term goal might be to increase donor support by 50% over the next year. Short term goals might be to conduct a lapsed donor survey, process the survey results, and develop innovative strategies for re-establishing relationships with these donors.

A second recommendation has to do with maintaining and utilizing a donor database to its full potential. JFS is currently utilizing a database service called eTapestry which helps them to manage their donor database. eTapestry markets itself to be an easy-to-use online resource designed specifically for the charity world. One of the many features that it boasts is the ability to categorize donors based on multiple factors such as married versus single. While this data is unarguably valuable, it is important to realize that merely having the information is not enough. JFS must decide how they intend to use the data they are continually amassing. As Romasco pointed out, if you can't think of

what to do with the information that you have, then it is most likely not worth having. (Romasco, Robert, 1983.)

Jewish Family Service personnel who have access to the database should be asking themselves questions like: ‘What do donors have in common?’ ‘Why did they give?’ ‘What would encourage them, and others like them, to give more?’ Perhaps the most important question to ask is: ‘Why didn't they give?’ Knowing the reasons why people stop giving will help JFS to refine their donor mailings and fundraising activities to ensure that they are meeting the needs and expectations of donors. For example, JFS might determine that donors find it hard to make the connection between their financial gifts and the ultimate value of that gift within the community. JFS would then be prepared to engage donors with examples of the ways in which their gifts would be put to work for the benefit of society.

Clearly, the task of managing a donor database and planning fundraising and donor outreach events is not a simple one. We suggest that JFS consider allocating some funding toward creating a Donor Relations position. Besides demonstrating a commitment to enhance donor relations, the position would help to ensure that ongoing active effort is being made to expand the donor population, as well as maintaining relationships with current donors. Currently, JFS employs a part time Director of Fund Development. Perhaps this position could be redirected to focus heavily on donor marketing.

We feel that another key area for enhancement is improved communications, not only with the community as a whole, but especially with current and prospective donors. The updated agency website and recently introduced email newsletter are great initial steps in this direction. However, both the website and e-newsletter are not necessarily custom tailored for donor audiences. To deal with this type of issue, the American Red Cross has utilized the inexpensive method of e-mail communications to keep donors up-to-date and interested in the organization. They have created e-mail campaigns which consist of ongoing series of e-mails designed to keep donors well informed of the organization's activities. Further, the e-mails show donors how their contributions make a difference in some tangible and easy to understand fashions. (Fund Raising Management, 2001a.) Following this example, JFS should endeavor to create more customized e-mails that keep current and prospective donors interested in and up-to-date about the agency. Succinct, easily accessible e-mails at appropriate intervals are an easy and effective way to keep current and potential donors engaged.

While electronic forms of communication can provide great results, a more personal type of contact is often required to reinforce marketing efforts. It would seem that word-of-mouth marketing has gained



significant traction and should be utilized by the agency. A marketing consultant, Brad Fay of the Keller Fay Group, indicates that people are twice as likely to trust the advice of friends and family members as they are to act on paid advertising. He goes on to state that some research has indicated that 48% of Americans are highly likely to make a donation based on such personal recommendations. The same research found that people tend to communicate positive comments about organizations in face-to-face conversations, rather than by telephone, e-mail, or other approaches. The consultant urges charities to create strong bonds with people who have extensive social networks and create opportunities for them to encourage their friends and associates to do more. Charities should craft e-mail messages and other marketing literature in such a fashion as to promote forwarding the information onto others. Such networking and referrals should also be rewarded and/or recognized in an appropriate fashion. (Hall, Holly, 2006.)

Regardless of the type of interaction, whether electronic or personal, it is important to recognize that most people read what interests them. People usually scan written materials before they read them, looking for what they find interesting, and then focus on those select portions. Therefore, it is crucial to build messages that are built for “browsers”. For example, donors are usually very interested in learning about how much good their money has done. (Ahern, Tom, 2001.) As such, communication with donors needs to be tailored to effectively convey the message of how their contribution has created a meaningful impact. Jewish Family Service needs to focus some energy on creating and properly distributing tailored messaging of this type.

Lastly, we suggest that JFS look into forming a community partnership with an appropriate organization that could offer marketing advice. By exchanging marketing expertise for one of JFS’ highly-developed counseling services, a mutually beneficial organization relationship could be formed. We feel that this type of strategic partnership would be keeping with JFS’ mission to support community well-being and may result in useful guidance and lessons learned from agencies that are or have been in similar marketing situations.

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7. Appendix A – Various printed marketing materials from JFS

(Hand-delivered to Professor Kasouf's office on December 17, 2007.)

- Brochure on “Adoption Services”;
- Brochure on “Elder Guardianship Conservatorship Program”; and
- General informational brochure “Connecting People With Compassionate Care”.