

Fundraising pamphlets, 1931-1954
written by Marts

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Financing Philanthropy

Published by Marts & Lundy, Inc. Directors of Financial Programs for Philanthropic Purposes
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VOLUME VI

SEPTEMBER, 1931

NUMBER 1

NEARLY SEVEN MILLION RAISED FOR PHILANTHROPY IN PAST YEAR

Many institutions make financial progress in spite of depression

DURING the past twelve months Marts & Lundy, Inc., have directed financing programs which have raised a total of \$6,728,000 for their clients. These clients have included colleges, hospitals, churches, fraternal organizations, memorial projects and other philanthropic institutions. This brings the grand total of money raised by Marts & Lundy for their clients to \$183,362,000.

In this issue we present briefly the news of some of these programs. No two of them have been directed in the same way, but a special program has been planned and fitted to each one. This procedure is in line with the Marts & Lundy policy, recently announced, to abandon the highly mechanical process which has come

to be known as a "drive" or "campaign" and to evolve for their clients "financing programs" of an effective and substantial nature.

While these programs are not identical, yet they are all based upon an accumulation of experience in the same general field. It is this cumulative and continuous experience which makes the Marts & Lundy service of value in the financing of philanthropic causes.

"Practice makes perfect" and experience develops skill. Whether it be in driving a nail, or perfecting a golf swing or directing a fund-raising program, constant and repeated experience on the part of an intelligent man teaches him aptness in it.

The experience Marts & Lundy have gained in raising funds for hundreds of clients has

(Continued on Page 2)



Westchester Photo Service, New York Times

Governor Franklin D. Roosevelt speaking at Descendants' Day exercises, June 14, 1931, at St. Paul's Episcopal Church, Eastchester, Mt. Vernon, N. Y. This was a great day in the program for the restoration of this neglected old parish. Five hundred descendants (of whom Governor Roosevelt was one) of the founders were expected and eight thousand came! St. Paul's is the oldest Episcopal Church in America. It was founded in 1665. Under the leadership of its present rector, Rev. W. Harold Weigle, it promises to become a shrine of national significance.

Financing Philanthropy

Financing Philanthropy

DISTRIBUTED periodically to Executives, Trustees, Directors and interested friends of educational, religious, philanthropic, character building, civic, fraternal and social welfare organizations devoted to the promotion of the public good.

By Marts & Lundy, Inc.

"SCOTCHMEN AYE RECKON FRAE AN ILL HOUR"

WHICH is the old Scotch way of saying, "Make the most of your situation, in times of difficulty, and plan and work your way forward." Plans made in an ill hour are more apt to succeed than plans made on the crest of a wave of enthusiasm and ease.

This seems to many of our institutions of philanthropy to be an "ill hour," but even so it is a time for reckoning and planning ahead. There is much more to a financing program for a college, or church, or hospital or other institution of public service than just knocking on doors and asking for money. There is interest to be aroused, new friends to be won, leadership to be enlisted, a potential constituency to be developed.

There is more, also, to gathering a harvest than just cutting the grain. There is first the soil to be tilled, the seed to be planted, the sun and rain to be absorbed.

The executives of many of our colleges, and churches, and philanthropic institutions are coming to realize the importance of seed-sowing and are hard at work now on constructive plans along these lines. Much progress can be made now by institutions which are determined to go forward and which are on the alert to find the path which leads forward.

It is no good in just waiting for good times. Good times come for those institutions which put brains into their plans and hard work into their efforts.

NEARLY SEVEN MILLION RAISED FOR PHILANTHROPY IN PAST YEAR

(Continued from Page 1)

taught us how to plan your financial program so that hearts may be enlarged and horizons widened by the vision of the service your institution is rendering and so that a successful course may be steered around the obstacles that may seem so unique and difficult to you.

We trust that the brief descriptions herein of some of our recent financing programs will give you a pleasing impression of the dignity, the stability and effectiveness of the Marts & Lundy method of financing philanthropy.



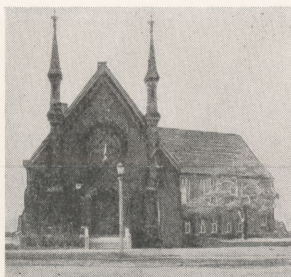
MADAME GALLI-CURCI ACTS AS HOSTESS FOR HARTWICK COLLEGE

HARTWICK COLLEGE, of Oneonta, N. Y., does not believe it is necessary to wait for "good times" in order to make new friends and gain new strength. Founded by the Lutheran Synod of New York in 1928, Hartwick already has a student enrollment of 419.

During the past Summer, Hartwick organized an Honorary Board of Trustees, composed of twenty of the most influential residents of Delaware and Otsego Counties. On this Honorary Board is Madame Amelita Galli-Curci, who acted as one of the hostesses at a meeting of the Board held at Oneonta on August 24, 1931.

Back of Madame Galli-Curci in the photograph appears Dr. Charles W. Leitzell, President of Hartwick College.

THE COMMUNITY CHURCH OF PARK RIDGE, ILL.



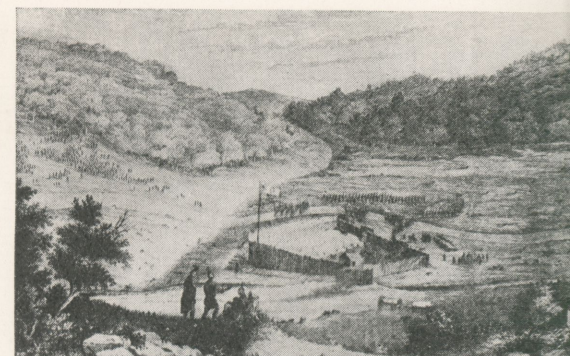
Community Church,
Park Ridge, Ill.

was the needed money raised, but it was done in a way to serve the spiritual purposes of this great little church. The pastor, Rev. O. F. Jordan, wrote us as follows:

"I want to bear testimony to the fine work which Mr. Fonken has done as director of the Campaign. He has done what I considered an impossible task. We have raised over thirty-five thousand dollars with no friction or trouble of any kind and with a constantly growing religious interest in my church. I have never seen a group of churchmen stand more loyally to a task than my men have stood by Mr. Fonken. We have raised our money and we have lifted the level of religious interest throughout our parish."

LAST March was not a time of general optimism, but it proved to be just the right time for the Community Church of Park Ridge, Illinois, to refinance its mortgage. A Marts & Lundy refinancing program was directed successfully by George H. Fonken, and over \$35,000 was obtained. Not only

Financing



Fort Necessity in 1754

FORT NECESSITY MEMORIAL A Part of the Washington Bicentennial Celebration

IN 1754 a young Colonel from Virginia, George Washington by name, commanded a little force which fought a French division at Fort Necessity, Uniontown, Pa. It was his baptism of fire, and the beginning of the war in America which determined that this continent should be Anglo-Saxon. Voltaire said of it, "A cannon shot fired in the woods of America was the signal that set all Europe in a blaze," for it was the beginning also of the Seven Years War in Europe which changed the map of the world.

After the war was over Washington returned to the property and held it until his death.

Funds are now being raised to restore the old Fort Necessity and to make a permanent memorial park on the property on which the battle was fought. This is one of the important phases of the celebration of the 200th anniversary of the birth of Washington,



The General Committee of The New Campus for
Colby College, held at Waterville, Me.

WHEN a recent survey of higher education in Maine recommended that Colby College should move to a new site after 113 years of not service on its present campus in Waterville, Maine, President Franklin W. Johnson and the trustees of Colby set valiantly about the business. Commi-

Philanthropy



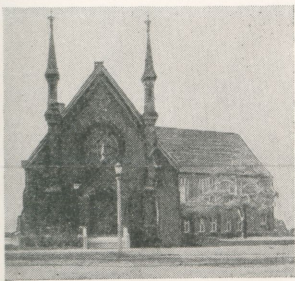
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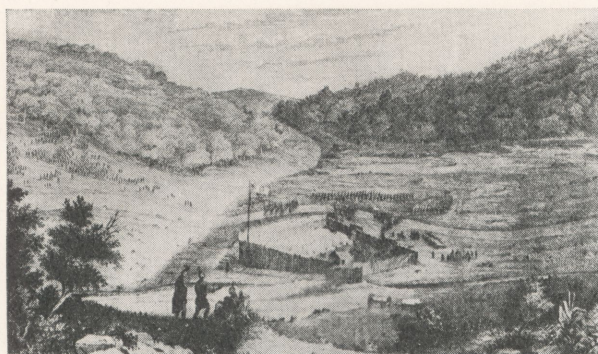
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ground for the memorial at Fort Necessity will be broken September 29 by Director Bloom of the George Washington Bicentennial Commission. Harvey McCauley is the Marts & Lundy resident director of the Fort Necessity fund.

THE NORTHFIELD SCHOOLS

THE active phase of the \$3,000,000 program of The Northfield Schools closed on scheduled time June 15, 1931. This financing program, which was launched a few weeks prior to the stock market break in 1929, encountered the most rocky sledding imaginable because of the depression of the past two years, but the leaders determined to see it through and forward the fund moved, steadily and determinedly. \$2,733,000 has already been received in gifts and bequests and thousands of new friends have been won for these splendid preparatory schools at East Northfield, Mass.

The Chairman writes: "Throughout it all, every member of your firm allocated to this task was unflagging in energy and encouragement when it was needed, and I wish to express my deep appreciation for all that you did. I certainly want to mention the work of Mr. A. W. Mohn, who played a very important part and won the admiration and affection of all who worked with him."

It is of interest to record that, in spite of the unexpected conditions encountered, the entire expenditures of this two year program were kept within the budget outlined at the outset.

AT a recent meeting of the directors of Marts & Lundy, Inc., Mr. Arthur W. Mohn and Mr. Floyd C. Freeman were elected treasurer and secretary, respectively, of the corporation.

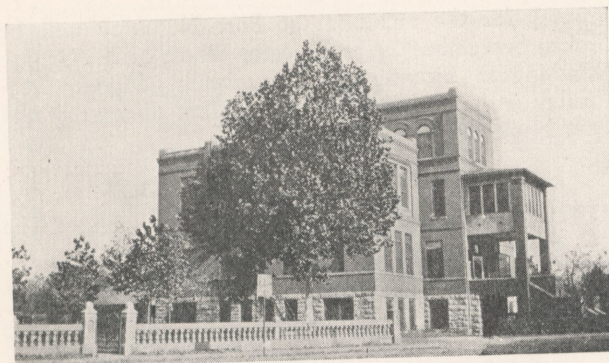


The General Committee of The New Campus for Old Colby. This picture was taken at the first meeting of the Committee, held at Waterville, Maine, August 14, 1931.

WHEN a recent survey of higher education in Maine recommended that Colby College should move to a new site after 113 years of notable service on its present campus in Waterville, Maine, President Franklin W. Johnson and the trustees of Colby set valiantly about the business. Committees

have been organized and are now undertaking to obtain a minimum of \$3,000,000 to equip a New Campus for Old Colby. Colby is under no delusion as to the difficulties entailed in its program at the present time, but neither is it at all fearful of its ultimate success.

Financing Philanthropy



**CHRISTIAN WELFARE HOSPITAL
EAST ST. LOUIS**

IT would have seemed unbelievable to most hospital boards in May of 1931 that a fund for a new building could be raised under existing conditions. Yet, the Christian Welfare Hospital of East St. Louis, Illinois, were convinced that their duty was to provide a new building, and Dr. Frank C. English, director of Marts & Lundy's Hospital Department, led them to a remarkable victory. \$90,000 was the goal; \$100,000 was secured. Writes the Chairman of the Board, Walter Schlaretzki:

"Dr. English recruited, organized and instructed 350 volunteer workers, promoted a popular and good-will publicity, and created an atmosphere of 'it can be done.' The result was an accumulation of enthusiasm which secured more than \$100,000 in pledges and assurances of more to come in. It was marvelously an 'everyman's campaign.' This victory I count amazing."

Many another institution in real need of funds could get them by adopting a well-planned program instead of waiting passively for "good times."

MASONIC TEMPLE OF SOUTH BEND REFINANCES SUCCESSFULLY

On July 21, 1931, the Masons of South Bend, Indiana, completed a highly successful refinancing program in which they raised \$375,433 for the purpose of removing the indebtedness on the St. Joseph Valley Temple Association. The South Bend Tribune, in reporting the success, said:

"The Campaign is declared by bankers, professional and business men of the city as one of the most remarkable civic enterprises ever conducted in South Bend."

L. A. Webster was the Marts & Lundy director. Insurance Trust Certificates were substituted for interest-bearing obligations.

THE AMERICAN HOSPITAL OF PARIS

WHEN our friendly competitor, Cyrus P. Keen, who had gone to Paris to conduct his fourth campaign for funds for the American Hospital there, was stricken fatally ill, he cabled Marts & Lundy for a director to take over his work. Our Colonel S. A. Moffatt caught the next boat and took up the work which the gallant Keen had been forced to relinquish.

In spite of this tragic interruption, Colonel Moffatt carried plans forward, with the loyal help of Mr. Keen's two assistants, Mr. Stetson and Miss Tompkins. General Pershing accepted the Chairmanship and gave up weeks of his vacation to see the program through. The objective of \$300,000 was speedily reached and surpassed by over 10%.

Following is a letter in the typically terse and direct style of the Commander of the A.E.F.:

"With profound faith in my countrymen's unflinching recognition of work well and devotedly done, I appeal to all Americans to give their sincere and generous support to the American Hospital of Paris." — Walter E. EDGE.

THE AMERICAN HOSPITAL OF PARIS

39, RUE CAMBON, 39
PARIS

TELEPHONES: { GUTENBERG 01-75
CENTRAL 21-36

CAMPAIGN COMMITTEE

Hon. Walter E. EDGE
Ambassador to France

Genl. John J. PERSHING
Chairman

Hon. Leo J. KEENA
Consul-General to France

A. K. MACOMBER
President Board of Governors

THE BOARD
OF
GOVERNORS
—
THE MEMBERS
OF THE
ATTENDING STAFF

June 18, 1931

Mr. S. A. Moffat,
American Hospital Campaign Headquarters,
39 rue Cambon,
Paris.

Dear Mr. Moffat,

I take this opportunity to thank you for the efficient way in which you have managed the American Hospital Campaign, the intensive phase of which has just been successfully completed.

Wishing you continued success in future enterprises,

Very sincerely,

John J. Pershing
Chairman, Campaign Committee.

L/S

"I shall gladly take the chairmanship of the drive for the American Hospital, as it is a very worthy cause and interests me greatly."
John J. PERSHING

FUND-RAISING IN WARTIME

A. C. MARTS

PRESIDENT, MARTS AND LUNDY, INC.

IN THE parlous days ahead every American has one supreme duty and interest—to help our beloved country overcome the most horrible and unbelievable threat to our national existence that we have ever experienced, and probably the greatest danger to human freedom that mankind has suffered for six centuries. Each individual, each institution, must dedicate full strength and devotion to that great united purpose. It is not necessary to remind you, the representatives of America's military educational institutions, of this responsibility, for it is at the core of your thinking and planning.

I state it, however, at the outset of this brief paper, lest some of you may think that the advice I am about to offer in reference to active fund-raising during the emergency is offered without proper consideration of the national emergency. I assure you that, as an officer in the reserve of one of our military establishments, ready and eager for active service if needed, I am fully aware of the nature of the military emergency, and in spite of it, indeed, even in part because of it, I bring you a message of encouragement and stimulation for plans to strengthen your institutions through fund-raising.

For America has always given most generously to its educational and religious institutions during periods of war emergencies. There are several reasons why this has been so, and why it may again be so in the years immediately ahead. But before I state them, let me first show you some facts concerning our nation's record of giving during past war years.

During the four year period prior to World War II, 1938-1941, the annual giving in America to philanthropy averaged \$1,322,000,000.

During the four war years, 1942-1945, annual giving in America averaged \$2,884,000,000 per year.

NOTE: Excerpt from an address before the Annual Convention of the Association of Military Colleges and Schools, Mayflower Hotel, Washington, D. C., January 19, 1951.

During World War II, annual giving to colleges rose from \$97,000,000 in 1941, to \$122,000,000 in 1945.

During World War II annual giving to Protestant churches rose from \$350,000,000 in 1941, to \$590,000,000 in 1945.

Looking back to the giving increases in World War I, we find that in the three years from 1914-1916, annual giving to philanthropy averaged \$655,333,000. While giving during the three years 1917-1919, averaged \$1,046,000,000.

Records for giving during the War between the States are not easily available, but we find that benevolences of four major Protestant denominations in 1860 equalled \$525,000, while benevolences to those same denominations in 1865 equalled \$1,052,000.

Why Does America Step up its Support of Colleges And Churches During Wartime?

There are several reasons in two major categories which may be cited. First, I should like to mention a basic, spiritual reason.

1. Americans love peace, and long and pray and work for world peace. It is one of our most fundamental purposes in the world. Consequently, when war comes, we are profoundly shocked by it, and find it extremely difficult to believe that war has indeed come. Invariably, this yearning for peace exposes us, as it has in the present crisis, to unpreparedness, and the shock of finding ourselves in actual danger stirs us, in time, to our maximum efforts. Only thus do we find the strength—the belated strength—to survive. Let us hope and pray that we will once again, in 1951, rally our latent power soon enough and energetically enough to survive the perils into which we are now plunged.

But once America has been aroused from our peacetime, easy-going habits, we develop a public spirit, a will and an energy that spill over beyond the primary requirements of making war, into more devotion to strengthening the home front, also. The older men and women who stay home are spurred by the sacrifices of the boys in uniform to greater effort in support of our home institutions of education, religion, character-building and welfare. Many a man reacted during the two World Wars to a request to work in a fund-raising campaign for his college or church about as follows:

“No, I’m sorry. I’m tired, been working long hours on account of extra war duties. Can’t take on anything now of this character. It will have to wait until the war is over—then I won’t be so tired.

“But wait, on second thought,—I guess the boys over there are more tired than I am. Wish I could be over there to help them, but I’d be no good over there.

“But, while they’re trying to save our country and the world, maybe we’d better build up the institutions over here that will help to make it more worth the saving.

“Oh—I’m tired, sure, but I’ll work in the campaign. What do you want me to do? Let’s go!”

This is the undergoing spiritual and patriotic reason which has helped to stimulate giving to unselfish causes during wartime. It goes without saying that in order to tap or harness this spirit in wartime, the cause which seeks support must itself be fundamental and sincere in its spirit and purpose.

2. The second reason for increased philanthropy in wartime lies in the great increase of money in circulation and the simultaneous decrease of the usual opportunities for spending it. With more cash in their hands, people can travel less, buy fewer television sets, frigidaires, clothes and houses.

So we see wartime producing two surpluses—a spiritual surplus of patriotism and public concern, and a financial surplus of ready cash.

This is not to imply that *all* people of America react in this constructive manner to these two wartime surpluses, indeed many of them do not, as we all well know. Some react most selfishly. But as a rule, these latter are not the men and women who build colleges and churches even in peacetime. There are enough fine-grained, patriotic men and women in America who *do* react *unselfishly* so that a definite trend of increased generosity in wartime has been established as an historical fact.

1953

A STATEMENT
CONCERNING
FUND-RAISING PRACTICES

With a Foreword by
SENATOR BERNARD TOMPKINS
Chairman,
THE STATE OF NEW YORK
JOINT LEGISLATIVE COMMITTEE
ON
CHARITABLE AND PHILANTHROPIC AGENCIES
AND ORGANIZATIONS

AMERICAN ASSOCIATION OF FUND-RAISING COUNSEL

The American Association of Fund-Raising Counsel is in full accord with the purpose of the New York Joint Legislative Committee on Charitable and Philanthropic Agencies and Organizations. That purpose is to eliminate unethical practices in the field of fund-solicitation.

At the invitation of the Committee, the Association presented at its hearings a statement with recommendations pointed toward eradicating the evils which the Committee had brought to light. The following pages contain a summary of that statement.

Senator Tompkins has generously provided an introductory statement. We are happy to note that the Association's co-operation has proved helpful in the effort to frame remedial legislation.

ARNAUD C. MARTS, President
American Association of Fund-Raising Counsel

FOREWORD

by BERNARD TOMPKINS, Chairman
State of New York Joint Legislative Committee on
Charitable and Philanthropic Agencies and Organizations

December 22, 1953

The headlines which our public inquiry in New York made recently gave the public, in shocking detail, the sordid operations of certain fake charities and loosely or improperly run fund-raising appeals.

It was our duty to expose to public view the conditions that were found, and the people who break faith with the charitable and generous citizens of our state, even though the number of such fake organizations and unprincipled individuals is relatively small. As in most activities, bad practices creep in among the good, and the rapid growth of philanthropic activity in America has created opportunities for a few unethical individuals and organizations to take advantage of the human instinct for charity.

Back of the shocking disclosures made before our Committee is a vast array of noble and useful philanthropic services and organizations to which 30 million American citizens give four billion dollars each year. These voluntary agencies of health, religion, education, welfare and culture are among the finest manifestations of American freedom and brotherhood.

To serve these institutions there has grown up during the past forty years in America a new profession of experienced fund-raising counsellors. These ethical fund-raising firms render most valuable aid to the legitimate philanthropic organizations of our state in their fund-raising efforts.

In our endeavor to understand the whole philanthropic and charitable enterprise in our state so that we might prepare proper recommendations for legislative action, we invited the American Association of Fund-Raising Counsel to testify before our Committee and to make recommendations for legislation from their viewpoint.

This invitation was extended as a tribute to the high standards which members of this Association have developed. The President of the Association devoted considerable time to the study of our problem and appeared at our hearing and presented to our Committee a written statement based on unanimous action of the accredited member firms of the Association. It is our hope that this may help us develop ways by which the public may distinguish between the legitimately run campaign for funds, and the one that is operated by the "fly-by-night" promoter.

Our Committee wishes to express again its appreciation to the Association for their advice and counsel which we are finding most helpful in consideration of the problems before us.

A STATEMENT ON FUND-RAISING PRACTICES

The State of New York Joint Legislative Committee on Charitable and Philanthropic Agencies and Organizations, under the chairmanship of Senator Bernard Tompkins, conducted public hearings in New York City during December, 1953.

Disclosures of high costs and unethical methods of fund-raising in these hearings gained nation-wide attention. What gained far less, if any, attention, is the fact that of the \$4 billion which American people give to philanthropy each year, at least 97 per cent is ethically raised at reasonable costs and well administered.

At the invitation of the Committee, Dr. Arnaud C. Marts, President of the American Association of Fund-Raising Counsel, and President of Marts & Lundy, Inc., presented a statement which undertook the following:

1. To emphasize the ethical standards adopted by the American Association of Fund-Raising Counsel, and which the Counsel believes should be applied to all philanthropic fund-raising.
2. To set forth observations of charity racketeering methods.
3. To outline legitimate costs of fund-raising programs.
4. To recommend legislation that would eliminate unethical and costly methods of raising funds—methods that prey upon public trust, thus diverting money that might otherwise be given to worthwhile organizations and institutions.

The Ethics of Fund-Raising

The statement presented to the Committee by Dr. Marts pointed out that the standards established by this Association "for the protection of the generous giving public are along the lines of your own study and objective. They may be briefly summed up as follows:

- "1. Our member firms will not serve any charitable institution or agency whose purpose, or methods, we cannot approve. We will not knowingly be used by any organization to induce charitably inclined persons to give their money to unworthy causes.
- "2. Our member firms do not raise funds on a percentage or commission basis. They do business on a fixed fee basis only and do not profit, directly or indirectly, from disbursements for the accounts of clients. There is a vast difference between the professional attitude of a fund-raising counsellor who performs his services on the basis of an agreed-upon compensation for an

agreed-upon period of time, and a fund-raiser who operates on the basis of a percentage of what he collects.

- "3. The executive head of a member organization must demonstrate a ten-year record of continuous experience as a professional in the fund-raising field. This helps to protect the public from those who dash into and out of this business without sufficient competence, experience, or devotion to ideals of public service.
- "4. Our Association looks with disfavor upon fund-raising firms which make exaggerated claims of past achievements, guarantees of results, and promises to raise great sums. These methods are harmful to the public."

Some Observations on Charity Racketeers

Members of the American Association of Fund-Raising Counsel are in position to observe "charity rackets" just as the medical and legal professions are in position to observe "ambulance chasers" and "quacks" in their fields. Some of these observations presented to the New York State Committee follow:

1. Undocumented estimates indicate that improper fund-raising methods are involved in obtaining up to \$100 million of the \$4 billion annually given to all philanthropic causes.
2. The responsibility for charity racketeering may be two-fold. The weakly-led institution which employs unworthy persons to raise funds is as guilty of a breach of faith to the public as is the employee who uses fraudulent fund-raising methods.
3. In the most flagrant cases of charity racketeering the fraudulent fund-raiser creates his own charitable "cause" before he starts to raise funds. Such fund raisers stage benefits for "paper charities"; solicit funds in fake religious garb; operate a telephone "boiler-room" for appeals which would violate postal regulations, or use other fraudulent means of which they are the chief beneficiaries.

The Committee heard other testimony that threw light on many irregular practices. For example, the sending of un-ordered merchandise through the mails along with appeals for funds was shown to be effective only for the manufacturers of the merchandise and the "promoters" who conducted such campaigns.

The Costs of Fund-Raising

The Committee heard evidence of some almost fantastic costs of raising funds by unethical methods. The head of one well-known national organization said he was "satisfied" with costs which approximated 89 per cent of the total amount contributed by a generous but misled public.

Dr. Marts, in his statement, said:

"The total of all costs in campaigns directed by member firms of the American Association of Fund-Raising Counsel vary from three per cent in larger campaigns for \$1,000,000 and over, up to 17 per cent in the smaller campaigns for amounts down to \$50,000, but let me say that only a fraction of these costs are fees to professional counsel. Obviously, the percentage of fixed charges rises in proportion to the lesser amount of the objective."

Total fund-raising costs were defined as including "printing, postage, rent, clerical hire, telephone and telegraph, travel, meetings and feature events, and the fees of professional counsel. The professional fee usually represents not more than one-third to one-half the total costs."

The Association also pointed out that some fund-raising campaigns are conducted at relatively high cost in their pioneering stages and yet are most satisfactory and rewarding. This is because the campaigns themselves are public relations tools that pave the way for future financial support at much lower cost.

Recommendations for Legislation

The American Association of Fund-Raising Counsel presented to the Committee the following recommendations for legislation in New York State:

- "1. It is our belief that New York State can render its best service in curbing the racketeer by creating a State Commission for Registration and Information for the use of citizens, contributors, philanthropic agencies, fund-raisers and local municipalities. We believe that the use of such information at a central, available, official source will enable the contributor to protect himself fully.
- "2. We therefore suggest for the consideration of your Committee that the State of New York establish an unpaid volunteer Commission on Registration and Information on Philanthropic Institutions and Fund Raising.
- "3. We suggest this Commission be made up of leading citizens representative of the public in general, contributors, accredited fund-raising firms, and private institutions for which funds are raised.
- "4. We suggest that this Commission engage a competent Executive Director and set up proper procedures for compulsory registration of all institutions which ask the public for contributions, and of all paid fund raisers or fund raising counsel who operate in the State.
- "5. We suggest that each institution and each paid fund raiser or fund raising counsel be required to fill out simple reports each year for re-registration answering such questions as:

- "A. How much money did you help to raise from the public in New York State?
- "B. What methods did you use?
Mail—Intensive Campaign—Benefits—Sale of unordered merchandise—other
- "C. What was the fund-raising cost?
- "D. Was compensation by salary, fee or percentage?
- "E. What fund-raising or counselling do you contemplate for the coming year?

"It is our belief that this State Commission on Registration and Information would exercise a wholesome deterrent on improper and expensive fund-raising procedures by acting as a clearing house for information to institutions, contributors and fund raisers.

"Most important, in our opinion, this Commission could bring the great power of public opinion to bear on the charity racketeers. As it is now, there is no official agency in this State to which the public can look for leadership in the war on charity racketeers, although certain voluntary groups, such as the Better Business Bureau and the National Information Bureau, are very helpful. Two of New York City's great newspapers have rendered excellent public service in recent years in exposing charity racketeers, but their reporters have been obliged to dig up the facts outside officially established channels.

"If this proposed Commission on Registration and Information were made up of the same caliber of citizens as those appointed to the Boards of State-supported hospitals, colleges, etc., it could soon take the initiative away from the charity racketeers.

"After two or three years of observation and experience, this proposed Commission would be able to come to a carefully considered judgment on which to base recommendations for any further legislation that might be needed to curb the two and a half per cent violators in the philanthropic field."

Conclusions

This report of our Association's presentation to the New York State Joint Legislative Committee has been prepared in the belief that those interested in philanthropic causes throughout the United States may wish to understand what constitutes charity racketeering and its extent in their own areas. If such practices exist, perhaps the recommendations we have made for legislation in New York may be applicable, in whole or in part, to other communities.

M E M B E R S

of the

AMERICAN ASSOCIATION OF FUND-RAISING COUNSEL

* * *

ADERTON-TROSTLE ASSOCIATES
Payne-Shoemaker Building
Harrisburg, Pennsylvania

KERSTING, BROWN & CO., INC.
50 Broad Street
New York, N. Y.

AMERICAN CITY BUREAU
221 North La Salle Street
Chicago, Illinois

KETCHUM, INC.
Chamber of Commerce Building
Pittsburgh, Pennsylvania

BEAVER ASSOCIATES, INC.
612 North Michigan Avenue
Chicago, Illinois

MARTS & LUNDY, INC.
521 Fifth Avenue
New York, N. Y.

REUEL ESTILL & CO., INC.
424 Madison Avenue
New York, N. Y.

PIERCE, HEDRICK AND SHERWOOD, INC.
30 Rockefeller Plaza
New York, N. Y.

CHARLES W. GAMBLE & ASSOCIATES
604 Central Avenue
East Orange, New Jersey

TAMBLYN AND BROWN, Inc.
6 East 45th Street
New York, N. Y.

JOHN PRICE JONES COMPANY, INC.
150 Nassau Street
New York, N. Y.

WARD, WELLS, DRESHMAN & REINHARDT
30 Rockefeller Plaza
New York, N. Y.

JOHN PRICE JONES COMPANY (Canada) LTD.
627 Dorchester Street West
Montreal, P. Q.

WILL, FOLSOM AND SMITH, INC.
25 West 43rd Street
New York, N. Y.

The Rising Tide of Philanthropy

By

ARNAUD C. MARTS

1954

The Rising Tide of Philanthropy

Excerpts from an address by

Arnaud C. Marts

President, Marts & Lundy, Inc.



ARNAUD C. MARTS, in this, his address in July, 1954, to the Annual Staff Conference of Marts & Lundy, Inc., reviews the current happenings and status of the vast philanthropic enterprise of America.

American philanthropy — the voluntary gifts of over \$4,500,000,000 per year to our religious, educational, character-building, health, and cultural agencies, is one of the noblest expressions of American freedom and character.

From his vantage point of observation and experience, as president of Marts & Lundy, Inc., fund-raising counsellors to hundreds of philanthropic institutions, president of the American Association of Fund Raising Counsel, and the author of "*Philanthropy's Role in Civilization*" (Harpers, 1953), Mr. Marts presents in this address a summary of the state of American philanthropy in 1954.

The Rising Tide of Philanthropy

(Excerpts from Mr. Marts' address to the annual Staff Conference of Marts & Lundy, Inc., July 14, 1954, Waldorf-Astoria Hotel, New York City.)

It is well for us to review the state of American philanthropy each year. Voluntary giving is one of the noblest manifestations of American freedom. The voluntary initiative of free men in America has created our churches, schools, colleges, hospitals, and hundreds of other types of cooperative endeavors, aimed at making a better world. Voluntary philanthropy is one of America's distinctive characteristics.

Let us look at the state of American Philanthropy in 1954.

1. Legislation in New York State

The most spectacular event in the field of philanthropy during the past year was the legislative investigation of so-called "charity rackets" in New York. This revealed abuses in fund-raising in New York City which were revolting, and which provided newspaper headlines across the nation, even around the world. Senator Bernard Tompkins, the Chairman of the Joint Legislative Committee, tells me that even the Moscow radio and news dispatches gave attention to the revelations.

It fell to me, as president of the American Association of Fund-Raising Counsel, to represent the ethical fund-raising counsel in these hearings. I assembled from the member firms of this Association data on costs and methods of the accredited fund-raising firms, and also their opinions in regard to the legislation under consideration. In this connection I had several conferences with the members of the Legislative Committee, and appeared as a witness at the public hearings.

The subsequent legislation enacted by the State of New York followed quite closely the recommendations we made.

On September 1, 1954 it will be necessary for each fund-raising firm, or independent individual fund-raiser, operating in New York to register with the State Department of Social Welfare. This registration will be for one year, renewable upon application each year.

As an aftermath of the public hearings, many special articles have appeared in national magazines, including Colliers, Saturday Evening Post, American, etc. They all played up the "scandal" angle. However, I believe the whole matter helped to place ourselves and other ethical fund-raising firms in a favorable light before the philanthropic public.

2. U. S. Senate Hearings

Shortly after the N. Y. State hearings, the U. S. Senate instructed a sub-committee of its Judiciary Committee to hold public hearings on fund-raising. The Chairman, Senator Langer of North Dakota, requested me to appear, which I did. Senator Tompkins of N. Y. was the other witness at this first hearing. I recommended that the Federal Government should center its endeavor on educating the public on ethical and non-ethical fund-raising and *not* to attempt to control it by Federal laws. Here again the Senators and the press, which was amply represented at the hearing, gave very respectful attention to me as representing the ethical fund-raisers, and I believe the giving public gained a new confidence in the ethical firms. Senator Langer has recently introduced a bill which, if enacted into law, will require each organization which enjoys tax exemption from the Bureau of Internal Revenue to furnish annually to the Secretary of the Treasury full information in regard to its receipts, expenditures, fund-raising contracts, etc.

3. Pennsylvania Legislation

Pennsylvania enacted a law in 1919 to regulate the solicitation of money for charitable purposes. This law requires the registration each year of any firm or other fund-raiser operating in Pennsylvania. The chief requirement for re-registration is that the fund-raiser shall not have received more than 15% of the amount raised. The Pennsylvania legislature recently appointed a joint committee to recommend any needed changes in this law. Public hearings were held by this Committee last month. The American Association of Fund-Raising Counsel was represented by our legal counsel and by our own Austin McClain and A. L. Aderton, President of Aderton-Trostle Associates of Harrisburg. The hearing took on none of the "charity rackets" aspects of the New York State hearings. We have filed a brief setting forth the recommendations of the American Association of Fund-Raising Counsel. Here again, effective stress was put on the ethical practices of the firms accredited by the American Association of Fund-Raising Counsel.

4. New Activity of the American Association of Fund-Raising Counsel

An important feature of the year has been the increased activity of the American Association of Fund-raising Counsel. This came about in the first instance because of the responsibilities thrust upon us by the New York legislative investigations of charity rackets.

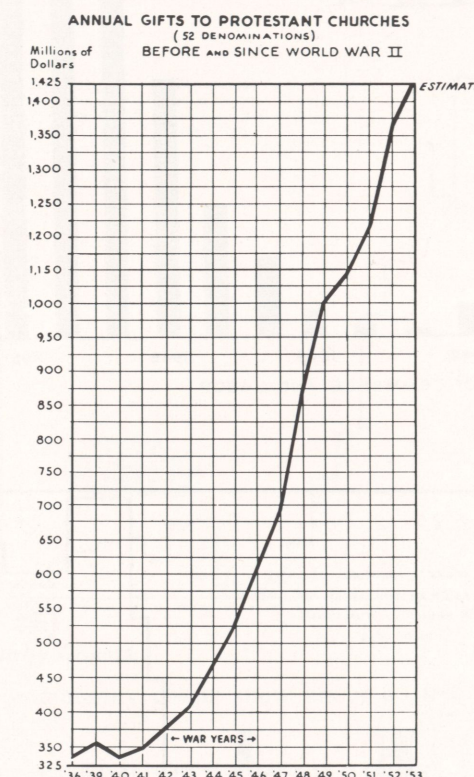
It became clear to us that the Association should take a more active role in educating the giving public in the ethics of fund-raising. Indeed, Senator Tompkins told us that we should take a more positive part in "policing" the fund-raising profession, as is done by the American Medical Association and the American Bar Association in their respective fields.

Consequently, the Association is opening permanent national headquarters at 500 Fifth Avenue, New York City, Rooms 1021 and 1022. The president of the Association will function as the spokesman for the profession, with the aid of an Administrative Committee of five appointed by him. Printed announcements of this new headquarters are currently being mailed to those who might have need for the Association's services. Here again we are underlining the ethical standards of the member firms.

5. Giving to Protestant Churches

The annual giving rose from \$550,000,000 in 1946 to \$1,345,935,000 in 1952, the latest year of which the figures are computed. My own estimate is that this figure increased by about 7% in 1953. If so, that would bring 1953 figures to \$1,425,000,000. We shall see how near that guess hits the mark next December when the compilation for 1953 is made.* I have heard of no indication of any reduction in giving to churches in 1954. In fact, there are certain indications that religious giving in 1954 will establish another new high.

Herewith is a chart showing the annual giving to churches since 1936:

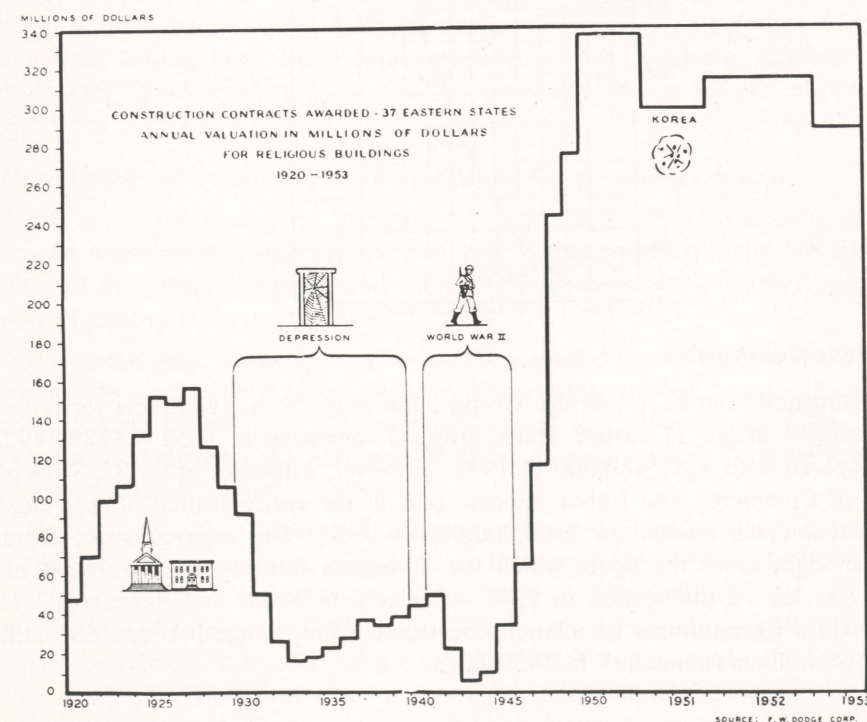
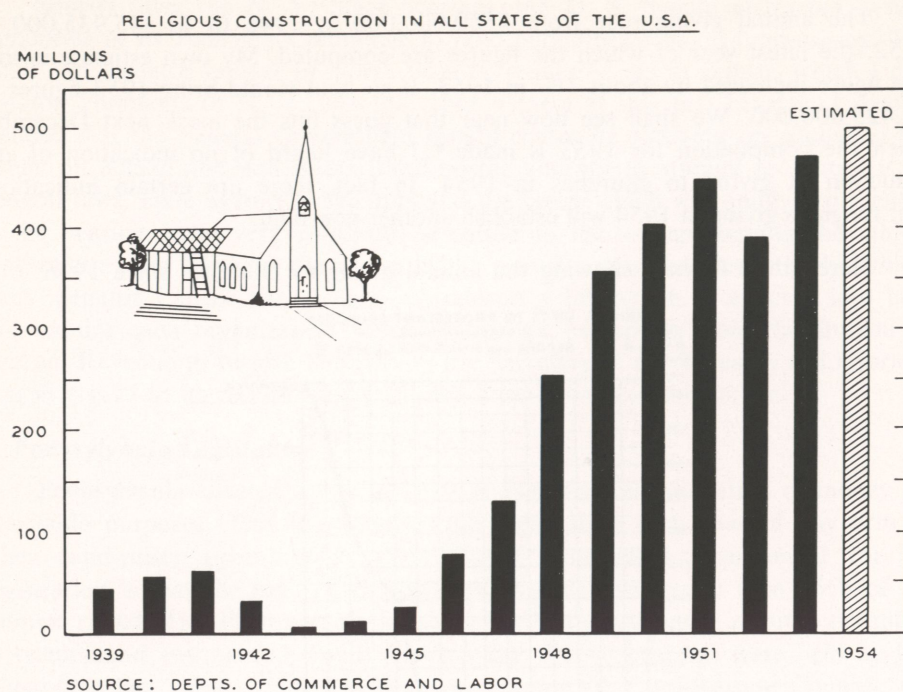


Religious Construction

Statistics from F. W. Dodge Corporation indicate that contracts for religious construction in the 37 eastern states dropped somewhat in 1953 — \$288,749,000 — compared with \$317,480,000 in 1952. However, estimates of the U. S. Department of Commerce and Labor indicate that in the entire United States religious construction will amount to \$500,000,000 in 1954. This enormous development is over eight times the figure which the Twentieth Century Fund forecast in its widely acclaimed publication in 1947 — "American Needs and Resources." They then said, "Expenditures for church construction may range between \$55 million and \$65 million (annually) in 1950-60".

*Figures subsequently released give the 1953 total as \$1,454,000,000.

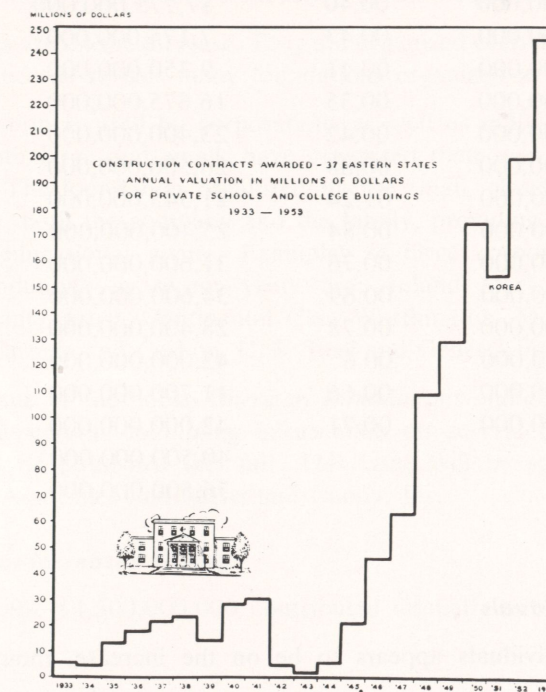
Herewith are two charts showing the religious construction contracts:



6. Giving to Colleges

The latest statistics we have are for 1950. George Lundy's analysis of those figures show gifts to higher education at about \$300,000,000. There is no indication that they are any less currently. Indeed, F. W. Dodge Corporation reports that construction contracts for private schools and colleges in 37 Eastern States reached an all time high of \$245,198,000 in 1953.

Herewith is a chart of these contracts for the past 20 years.



7. Giving to Community Chests

The figures on community chests show about a 10% increase in 1953, as follows:

COMMUNITY CHEST GIVING

Year	Number of Chests	Giving
1952	1500	\$240,000,000
1953	1560	266,000,000

8. Corporation Giving

Here again we find a three-year lag in statistics of giving, but all indications are that giving by corporations is decidedly on the up-grade. The most important single event was the decision of the Courts of New Jersey, confirmed by the United States Supreme Court, that corporations may legally make contributions to educational institutions.

In 1935, the Congress passed a Revenue Act which exempted from tax corpora-

tions' contributions to charitable agencies up to 5% of net income. Following is a record of subsequent contributions:

CORPORATION CONTRIBUTIONS, NET INCOME AND GIVING POTENTIAL

Year	Contributions	% Contributed of Net Income	Net Income	Full 5% Allowable For Contributions
1936	\$30,000,000	00.40	\$7,775,000,000	\$388,000,000
1939	31,000,000	00.43	7,175,000,000	358,000,000
1940	38,000,000	00.41	9,350,000,000	467,000,000
1941	58,000,000	00.35	16,675,000,000	833,000,000
1942	98,000,000	00.42	23,400,000,000	1,170,000,000
1944	234,000,000	00.88	26,500,000,000	1,325,000,000
1945	266,000,000	01.24	21,345,000,000	1,067,000,000
1946	214,000,000	00.84	25,400,000,000	1,270,000,000
1947	241,000,000	00.76	31,600,000,000	1,580,000,000
1948	239,000,000	00.69	34,600,000,000	1,730,000,000
1949	223,000,000	00.78	28,400,000,000	1,420,000,000
1950	252,000,000	00.6	42,000,000,000	2,100,000,000
1951*	275,000,000	00.66	41,700,000,000	2,080,000,000
1952*	300,000,000	00.71	42,000,000,000	2,100,000,000
1953*			40,500,000,000	2,025,000,000
1954*			36,500,000,000	1,825,000,000

*Estimated.

9. Giving by Individuals

Giving by individuals appears to be on the increase, though we have no late statistics.

Herewith is a table showing those figures which are available.

PHILANTHROPIC GIVING OF INDIVIDUAL INCOME TAX PAYERS (APPROXIMATE)

(Does not include bequests, corporation or foundation giving)

Year	Income of Income Taxpayers	Contributions	Full 20% Allowable Contributions
1950	\$158,000,000,000	\$3,800,000,000 (02.4%)	\$31,600,000,000
1951	185,000,000,000	4,000,000,000 (02.1%)	37,000,000,000
1952*	200,000,000,000	(Figures not yet available)	40,000,000,000
1953*	205,000,000,000	(Figures not yet available)	41,000,000,000
1954*	195,000,000,000	(Figures not yet available)	39,000,000,000

*Estimated.

The 1954 Tax Law raised the deductions allowed to individuals from 20% to 30%, provided the additional 10% goes exclusively to educational organizations, hospitals, churches, or conventions or associations of churches.

10. Foundations in 1954

Nationwide research conducted in 1952 and 1953 by AMERICAN FOUNDATION INFORMATION SERVICE, in the sponsorship of whose new volume to be published this Fall we are now collaborating, has produced financial and other records on approximately 4000 foundations. In addition, the files of AFIS contain the names of hundreds of other foundations. The opinion of this service is that the number of foundations in existence at the present time, which would meet any reasonable definition, is probably somewhere in the neighborhood of 5000.

Foundations are on the increase. They are organized each day. Recent research covering 1952 records reveals many foundations organized in 1950 and 1951.

The foundation is used by corporations as well as individuals. Hundreds of corporations, both large and small, have organized their own foundations in the past few years. The foundation organized by the small, closely held corporation serves, as a rule, both the company and the family, providing a channel for their charitable and educational giving. Examples of large corporations which have established foundations in recent years are: Inland Steel, Alcoa, Monsanto Chemical, Guaranty Trust, Continental Can, Worthington. Most recent additions include Union Carbide and Carbon, U. S. Steel and General Foods.

The last issue of the book *American Foundations and their Fields* appeared in 1948. A new edition containing information on several thousand additional foundations will be published this fall. This issue will be sponsored jointly by Raymond Rich Associates and Marts and Lundy, Inc.

11. Potentials for Increased Giving

Who gives the \$4,500,000,000 contributed annually to America's voluntary constitutions?

		Approximate
Individuals give	\$4,000,000,000	.90%
Corporations give	300,000,000	.06%
Foundations give	150,000,000	.03%
Bequests provide	50,000,000	.01%

Individuals

The aggregate incomes of 42,600,000 income taxpayers equals \$185,171,000,000
The full 30% allowable for contributions equals \$55,551,000,000
The amount of their contributions equals \$4,000,000,000 (02.1%)
Therefore the remaining potential which we can help develop amounts to \$51,551,000,000

Corporations

Corporation net income equals \$42,000,000,000
The full 5% allowable for contributions equals \$2,100,000,000
The amount of their contributions equals \$300,000,000 (00.66%)
Therefore the remaining potential which we can help develop amounts to \$1,800,000,000

From these tables we note that, while Foundations and Corporations are fulfilling important roles in providing support for our churches, colleges, hospitals and other philanthropic enterprises, it is the giving of *individuals* which provide, year after year, 90% of the total financial support of American philanthropy.

It is also significant to note that the greatest potential of increased giving is in the hearts and pocket-books of individuals. If all income tax payers should ever be induced to give the full 30% of net income which they are allowed to deduct on their annual income tax returns, our philanthropic institutions would enjoy an increased income of 55 billions of dollars! What a boon that would be to our nation and to our world.

Of course, all of them will never reach that high level of giving, but it is an assurance and a challenge to all persons interested in philanthropy to realize that this enormous potential of increased giving rests in the capabilities of the American people.

12. Bequests and Taxes

A few interesting bequests have been publicized in recent months which suggest how socially-minded persons of wealth may extend their service to mankind beyond their own mortal lives.

Here is one parallel situation: Mrs. Matthew Wilkes (the daughter of Hetty Green) left an estate of \$95,000,000 and bequeathed \$87,000,000 of it to 63 philanthropic institutions, which will serve God and man for generations.

About the same time, the papers reported that a member of one of America's leading industrial families left an estate of \$75,000,000, with a relatively small provision for philanthropy. The taxes on his estate were reported to be \$56,000,000.

Here is another parallel situation: Last month the newspapers reported that Mr. John A. Hartford of the A & P Stores had left an estate of \$55,000,000, most of it to a charitable foundation. His New York State taxes were only \$61,171.

In the same issue of the paper was news concerning the estate of a famed financier's widow — appraised at \$14,000,000. Little was left to charity, so the New York State tax was \$1,900,000 and the Federal estate tax could well be \$11,000,000.

Should not more emphasis be put upon showing men and women how their money may continue to serve American philanthropy after their death?

13. Federated Fund-Raising

The United Negro College Fund continues to be the outstanding example of federated fund-raising in the college field. There is not the slightest doubt that this united fund-raising effort for its 31 member colleges has raised far more funds, both annual and capital, than the colleges could raise in separate efforts.

It is very likely, also, that next year's joint campaign in the Missouri Synod Lutheran Church will raise more funds for Valparaiso University and two other institutions than they could raise separately within the church, because of the unusual discipline of that church.

However, these situations in the college field are exceptional and do not indicate a general pattern. In normal situations it is our belief that the college which creates and cultivates its own constituency will develop the greater financial support.

14. "Council for Financial Aid to Education, Inc."

Next to the United Negro College Fund this has been the most noteworthy program in federated fund-raising for colleges. It was created by a half dozen leading industrialists with social vision in order to extend the original Indiana cooperative plan sparked by President Tom Jones of Earlham and President F. H. Sparks of Wabash. Tom Jones told us about the Indiana plan five years ago when he was guest speaker at our Staff Conference. The Indiana success led the colleges in Ohio, Michigan, Pennsylvania, New York and finally 25 other states to establish state or regional associations to raise operating funds cooperatively from corporations.

Mr. Alfred P. Sloan, Jr., and a few other business men of his calibre, then created the "Council for Financial Aid to Education" to spearhead the educational program to induce corporations to give funds to the private colleges.

National headquarters were set up at 6 East 45th Street, New York, with Dr. Wilson Compton as the full-time president and with a competent staff of writers, public relations specialists, etc.

The Council has published pamphlets, reports and other stimuli to corporation giving, and is now preparing a new series of publications designed to guide colleges in fund-raising efforts, organization of development programs, etc.

15. The Growing Fund-Raising Profession

We are in a growing business, or calling, or profession. New fund-raising firms are being formed each year. Also, more colleges, hospitals, and other philanthropic institutions are appointing administrative officers who give full time to fund-raising.

Mr. Lundy and I have seen this new profession grow in the past 35 years from a dozen or so men who were making it their life work to perhaps 5,000 in our generation. It is still in its early stages. You are meeting a need of your generation, and I hope each of you is enjoying the fun of creating a new and useful profession.

Decreasing Public Resistance

There was a time which some of us old-timers — George Lundy, Floyd Freeman, etc. — remember when we had a hard time persuading many people that we were in a respectable calling. "Professional fund-raiser" was a term not too complimentary.

During the past few years, and especially the most recent years, I find a decided change of attitude toward us. We are becoming accepted, not merely as respectable and honorable persons, but even as essential to our day and age. Many factors are contributing to that happy result. I will mention only two or three.

1st — a sustained record of several of the leading firms, our own included, in ethical, honorable and successful counselling of many of the nation's leading philanthropic institutions.

2nd — The work of the American Association of Fund-Raising Counsel in recent months in teaching the public the difference between ethical fund-raisers and the other kind.

3rd — Another factor in the increase of public acceptance of our service is to be found in the growing volume of publications in the philanthropic field.

F. Emerson Andrews, of the Russell Sage Foundation, has made a valuable contribution to the literature of philanthropy by three recent books, *Philanthropic Giving*, *Corporation Giving*, and *Attitudes Toward Giving*.

George Lundy's and Louis Robey's several booklets have had wide reader circulation in the philanthropic field. George Lundy's *The Plight of our Colleges* and his *Raising Money for Church Purposes* in the recently published book *Successful Fund-Raising Sermons*, and Dr. Louis Robey's address *Public Relations and Fund-Raising for a Small Denominational College*, made on the occasion of his receiving the honorary degree of Doctor of Laws last month, have added to the dignity of the fund-raising profession.

Also there is a book recently published by Harper's, *Philanthropy's Role in Civilization*, which I had the honor of writing.

Only last week the Library of Congress requested all the past and future issues of our *Financing Philanthropy* for their files. Many journals are carrying articles currently on the fund-raising business, including the current issues of *Barron's Weekly*, and *Kiplinger's Changing Times*.

After 35 years of pioneering a new business without much social approval, we find that we are being recognized as useful and essential members of 1954 society. Congratulations to you all on being in this business, calling or profession!



More than 100 staff members and guests were present at the final session of the 1954 Marts & Lundy Staff Conference which was held at the Waldorf-Astoria in New York. Principal speaker was Dr. Lindsley F. Kimball, vice-president of the Rockefeller Foundation.

Additional copies of this address may be had upon request from:

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New York 17, N. Y.

MARTS & LUNDY, INC.
1821 Lincoln-Liberty Building
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MARTS & LUNDY, INC.
Harter Bank Building
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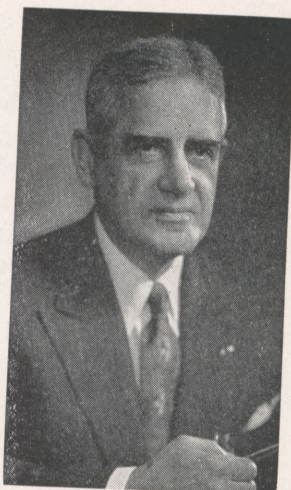
Quality as well as Quantity in Church Fund Raising

An Interview with DR. A. C. MARTS, President of Marts and Lundy, Inc.

EDITOR'S NOTE: "What really makes a successful church campaign?" "Does a capital funds program hurt regular giving?" "What does Marts and Lundy do in its campaigns to warrant so many churches turning to it again when they need professional guidance for a new capital funds campaign?"

For the past several months an increasing number of questions of this type have been asked of Dr. A. C. Marts by hundreds of pastors and laymen seeking honest answers to their fund-raising problems.

Here Dr. Marts answers these questions.



Arnaud C. Marts

Q. Why has Marts and Lundy been so successful with church campaigns?

A. We think it is because of three things which we try to bring to every campaign.

Q. What are these three things?

A. Well, briefly they are a broad knowledge of fund-raising resulting from 27 years of experience with campaigns of all types and size; trained personnel who are selected not only for their ability but for their Christian character as well; and finally, a dedication on the part of all of us to put quality first.

Q. Do you specialize in church campaigns, then?

A. Several members of our staff do. We do not, however, restrict our activities to church campaigns alone, although for years they have constituted a very important part of our work. The fact that we engage in directing all types of campaigns means that we are able to bring to our churches the fund-raising experience and techniques learned in multi-million dollar programs for educational and philanthropic institutions of all kinds.

Q. You feel, then, that diversity of campaign experience has made for better performance in raising funds for churches. Is that right?

A. Yes. Our men who conduct church campaigns are thoroughly specialized in their training and approach, but they are able to draw on the experiences of others and apply these experiences to their own campaigns. If we were to specialize in church campaigns alone, they would not have this added advantage.

Q. When you say that you "put quality first," what do you mean?

A. Well, for one thing, we mean that Marts and Lundy will not take a church campaign or any other campaign until we have assured ourselves that all of the elements for doing a good job for the client are available.

Q. Would you explain that?

A. Certainly. For instance, if we find that, because of certain factors which we are able to determine through personal interviews with members of the church, it would be unwise for the church to enter into a capital funds program right now, or if we find that the right director for the job is already committed, we advise the church against a campaign. For if we were to take it under these circumstances, we could not put quality first. In short, Marts and Lundy feels that if it cannot do the best possible job for the church, then it is best not to do it. Otherwise, we would be sacrificing quality for quantity.

Q. Marts and Lundy will not run a campaign for just any church then?

A. If you mean that we will not take a church campaign just because we are asked to, the answer is no.

Q. Recently, your firm was referred to as the "Tiffany's of fund-raising." Why was that?

A. The client who used that phrase said he thought it was because of the superlative quality of our work.

Q. I understand that you regard your work as a strictly professional service. Is that so?

A. Yes. We do not advertise in church publications and we conduct ourselves on a professional basis by serving our clients in the same manner as would a lawyer or a physician.

Q. If you do not advertise and actively seek clients, then how do campaigns come to you?

A. Primarily through recommendations from churches which have already availed themselves of our services. One pastor will tell another, or one layman will tell another of what was accomplished in their church during one of our campaigns.

Q. The church gets in contact with you, then. You do not contact it first?

A. That's right. Some fund-raising organizations will often visit a church to interest them in their services, but Marts and Lundy does not use that approach. We find it is to everybody's advantage not to enter into a discussion until the church itself is convinced that it wants a campaign, and desires to consult us about it.

Q. When a church is convinced that it wants a campaign and comes to you, what happens next?

A. An officer of our company makes a personal visit to the church and meets with the pastor and officers. At this meeting he explains fully our methods and the principles on which we operate. We definitely do not make any attempt to "sell" them our services, but leave them to reach a decision later.

Q. If they decide to ask you to direct their campaign, how do you proceed?

A. As soon as our director arrives, he proceeds to make a survey, which consists of three parts:

First, we carefully analyze the need and how much will be necessary to meet it. Then through a method which we have developed over the years, we determine about how much the members of the church could give toward this need. Using this information, together with what we have learned in scores of other campaigns similar to this one, we reach a fair conclusion as to what would be a proper goal.

Q. Is this method really accurate?

A. Surprisingly so. A recent survey of the last 16 of our church campaigns showed us that the goals set for their total campaigns amounted to \$1,457,000. The total amount subscribed amounted to \$1,565,797.

Q. What is the next step of the Survey?

A. The director will interview 40 or 50 members of the church to gauge, if possible, their attitude toward the proposed program, and to discover what questions, objections and criticisms, if any, are in the minds of the members, so that those who solicit them may be alerted and furnished in advance with the proper answers.

Q. What is the third part of the Survey?

▲ Proposed new building, First Presbyterian Church, Bethlehem, Pennsylvania.

A meeting of the congregation. They may have already approved the program, but we want them to discuss it again in the light of the information we have secured as to attitudes, and possible objectives; also, the manner in which the campaign will be conducted, what the cost will be including our fee, etc.

They are then asked to vote whether they still want to go ahead.

Q. Have many churches decided not to proceed?

A. No. Out of hundreds of such meetings not more than two or three have so decided. In a few more we have recommended they postpone the campaign until they could clear up some matters we found in the survey which would mitigate against a successful campaign. In every case, I think, where they have accepted our advice they have had a successful campaign at a later date.

Q. Can you guarantee a church goal?

A. If you mean that the church will be able to raise in every case as much as or more than our study indicates, the answer is no, for two reasons:

1. We know that no one can honestly make such a guarantee, and we refuse to do it just to get contracts.
2. But there is another very important reason why we should refuse to do it, even if we could.

We set very high standards for the promotion of all of our campaigns. One of these is that we will never use high-pressure methods. In other words, we believe no one should be compelled to make a subscription he doesn't want to make, and that no one should be allowed to subscribe more than he can pay.

We have a good scriptural ground for this position. Exodus 25:1-2 says, "And the Lord spake unto Moses saying, speak unto the children of Israel that they bring me an offering. Of every man that giveth it *willing* with his heart, ye shall take my offering." And later Moses in Exodus 35:5 told the Israelites, "Take ye from among you an offering unto the Lord: whosoever is of a *willing* heart, let *him* bring it, an offering to the Lord."

Now suppose we have guaranteed an objective of \$100,000, and as the campaign nears its end it becomes apparent that it is likely to produce only \$90,000 or \$95,000, do you think we, or anyone else, could refrain from using some pretty strong pressure to secure the full amount? And, if we did, don't you realize that the members would know they were being pressed to save the professional fund-raisers instead of for the good of the church?

We know it, and if we can't get contracts without using this ruse, we'll get along without the contracts. Just let me say, however, that we are not expecting to go out of the business of directing church campaigns.

Another thing—if we were willing to guarantee the financial objective, we, too, would be compelled to charge larger fees than we do.

Q. Do you make a guarantee of any kind?

A. Yes. We believe there are two objectives to every campaign:

1. The financial objective, of course, and this we are unwilling to guarantee for the reason I just gave you.
2. The spiritual objective. This we consider to be much the more important of the two. We believe the campaign should be conducted in such a way that it will become a spiritual force in the congregation; that the members will be brought closer together; that they will learn to know their church better, its obligations, responsibilities and opportunities. If it is done in this way, the membership will be greatly increased, attendance will grow, and funds for local expenses will be given in larger sums.

We guarantee to assign directors who not only have been carefully trained, but who are themselves church men, acquainted with the problems of the local church, and who will direct their campaigns in a manner which will secure all the members of the church are willing to give. They know that to do more than that by high-pressure methods would create resentment and result in dissatisfaction, and loss to the church.

In the second place, we guarantee that these directors will conduct themselves and the campaign in a manner which will produce the second of the objectives I mentioned a moment ago, which as I said, is the more important one.

Our church clients, in writing to us after their campaigns are over, stress their opinion that this was the really important outcome of the campaign.

Q. How do you select your campaign directors?

A. Through personal interviews and careful investigation of their professional and personal history. Each potential member of Marts and Lundy is questioned by officers of the firm to make certain that in addition to being qualified he is also a person of high Christian character. The best campaign director in the world could not serve as a member of our staff if we weren't convinced that he is a church man himself, having knowledge and understanding of the problems, responsibilities and opportunities of the church.

Q. How are these men trained?

A. First, a new campaign director is sent out with experienced directors and taught how to handle the mechanics of fund-raising. In addition, each director receives a copy of the MARTS & LUNDY REPORTER once a month, which carries a report on all of the campaigns which are in progress. Through this method, the director is able to keep abreast of all other campaigns and to incorporate into his campaign the best ideas from others.

Q. Does a campaign director receive training and help in other ways?

A. Yes. Once a year the entire staff is called in for a conference of several days, at which time all phases of fund-raising growing out of the experience of the staff and guest specialists are discussed. After the conference, every word which is uttered is printed in an annual staff

conference report and each director receives a copy. Over the years, these reports comprise, without any question, the greatest library on fund-raising in existence.

* Another way in which church campaign directors are kept informed is through the exchange distribution of all materials used in Marts and Lundy campaigns. Each director sends to our Canton office copies of all publicity materials, letters, programs, instructions, etc., and one of each is then sent to every other staff member.

Q. How about supervision? Do campaign directors receive any type of personal supervision?

A. Constantly. Each director is assigned to an officer of the company and it is his responsibility to give direct supervision to the director through personal conference, telephone and mail. Whenever it is necessary for the officer to visit his director's campaign, he does so.

Q. In addition to personnel and experience, do you provide the church with anything else it would not do for itself?

A. Yes. Marts and Lundy also provides the church with effective and proven publicity tools which are created by a staff of highly trained publicists.

Q. Is there any particular size of church campaign which Marts and Lundy prefers?

A. No. We direct all types and sizes of church campaigns, whether the goal is for \$50,000 or \$1,000,000. Our only concern is that we conduct for a church a campaign which is in keeping with both its financial ability and its current need.

Q. Is your fee based on a percentage of the amount raised?

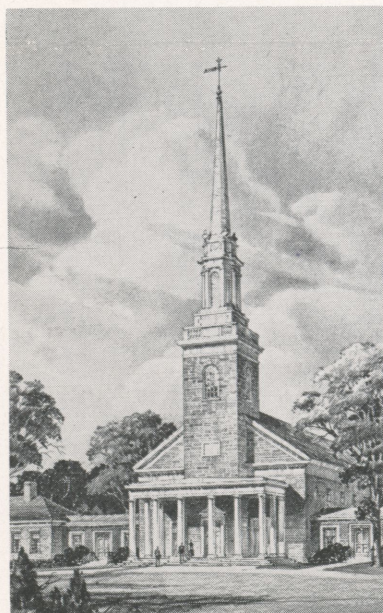
A. Our fee is in no way related to the amount of money which is raised. It is our conviction that if we were to place our fees on a percentage basis, we could rightfully be accused of conducting a campaign for our own ends.

Q. Well, is your fee based on the size of the goal, then?

A. No. Marts and Lundy charges a set fee based on what must be done to successfully complete a campaign. The fact that a goal has been set at \$200,000 does not mean that the fee would be higher if the goal had been set at \$300,000.

Q. How does a capital funds campaign affect a church's regular giving?

A. If anything, it increases it. Experience has shown us time and time again that a capital funds campaign in no way detracts from the giving toward regular church needs. The reverse is true, for when a church goes through an intensive period where its members are being made aware of its needs through publicity and other media, it finds that more people than ever are made aware of its usefulness and begin giving in proportion to this new understanding.





John W. Goodnough



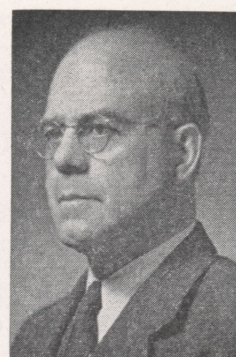
John E. Manley



Charles W. Crist



Bayard T. Skilling



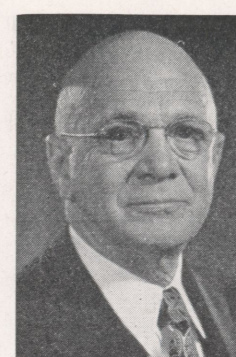
Herbert R. Hadcock



Frank E. Wood



Charles S. Dice



Harold C. Dudley



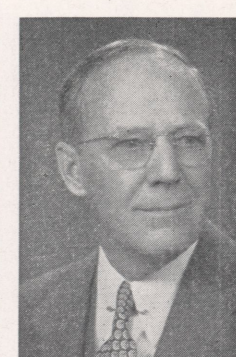
Raymond W. Cooper



J. Floyd McTyier



Philip C. King



Floyd C. Freeman

Here is the Record

for twenty recent Marts and Lundy church campaigns with comments by pastors and lay leaders.

ASBURY MEMORIAL METHODIST CHURCH Harrisonburg, Virginia

Membership: 1200
Campaign Objective \$130,000
Amount Subscribed 130,291
For New Educational Building

"Even the by-products of our successful campaign, conducted by your Mr. Goodnough, have been most satisfactory. The report suppers developed excellent fellowship, new workers were discovered, a spirit of frustration was overcome, and the entire church was given a forward impetus!"

THE METHODIST CHURCH Floral Park, New York

Membership: 1228
Campaign Objective \$75,000
Amount Subscribed 88,467
For Reconstructed Parish House and
New Sunday School Building

"Having had two Marts & Lundy campaigns, we can say that your planning, techniques and excellent direction from high calibre devoted Christian men is the answer and we are most grateful to have shared these two experiences with you." Bayard Skilling was the director.

CHESTNUT AVENUE METHODIST CHURCH Newport News, Virginia

Membership: 1100
Campaign Objective \$85,000
Amount Subscribed 94,482
For New Educational Building

"The initial cost of the campaign has been far overshadowed by the splendid results. From the very beginning we had confidence in the wise techniques and fine spirit of your director, James Avison. He created and organized an army of workers from our membership, inspired and trained them in a most admirable way."

FORT HILL METHODIST CHURCH Lynchburg, Virginia

Membership: 1297
Campaign Objective \$ 75,000
Amount Subscribed 100,872
For New Sanctuary

"You may rest assured that we have nothing but words of praise for your firm and will not hesitate to recommend you anytime, anywhere. We want to thank your company for a job well done and for sending us such a splendid director as Floyd Freeman."

THE COMMUNITY CHURCH Ho-Ho-Kus, New Jersey

Membership: 338
Campaign Objective \$75,000
Amount Subscribed 78,243
For New Educational Building

"We have been so happily pleased and helped by your organization. I have the highest respect and admiration for Charles Dice, who is a most efficient and capable director and Christian gentleman."

FIRST PRESBYTERIAN CHURCH Bethlehem, Pennsylvania

Membership: 1256
Campaign Objective \$525,000
Amount Subscribed 601,942
For New Sanctuary

"The pastor of the church came to the congregation from Wales only a year ago; in fact, the campaign opened on the first anniversary of his installation. He said that in Wales they knew nothing of professional fund direction, and he was impressed with how much better the work progresses when it is carefully planned by experienced directors, such as Austin McClain and Bayard Skilling."

Shown at the top of pages 4, 5 and 6 are the photographs of regular members of the Marts and Lundy organization who are experienced in and available for the directing of campaigns for local churches.

FIRST BAPTIST CHURCH Des Moines, Iowa

Membership: 1000
Campaign Objective \$150,000
Amount Subscribed 169,382
For New Educational Building

"We feel strongly that our fund-raising campaign has given our entire congregation a tremendous spiritual lift. We found many splendid new workers who were heretofore unknown to us and who will be of unlimited value to us in our year after year canvassing for annual pledges. Words cannot express our appreciation and we certainly wish your firm continuing success."

FIRST PRESBYTERIAN CHURCH Wood-Ridge, New Jersey

Membership: 326
Campaign Objective \$ 45,000
Amount Subscribed 100,260
For New Sanctuary

"I am firmly convinced that no church should launch out on a major fund-raising program without the coaching your firm offers. I shall recommend your services to all my brethren in the ministry without qualifications." Raymond Cooper was the director.

MARGATE COMMUNITY BAPTIST CHURCH Margate, New Jersey

Membership: 230
Campaign Objective \$ 70,000
Amount Subscribed 125,101
For New Church and Educational
Building

"The collateral benefits of this campaign in the long view will prove as valuable as the \$125,000 raised under Mr. Cooper's direction. It must be a great personal satisfaction to you and your staff to accomplish such fine results."

REVEILLE METHODIST CHURCH Richmond, Virginia

Membership: 1778
Campaign Objective \$205,000
Amount Subscribed 305,277
For New Sanctuary

"Our membership, which had been disintegrating because of being without a church home for a year and a half, was suddenly welded together by the thoroughness and spirit of the campaign. The men were banded together; the women were organized. Over 800 attended our out-of-doors promotional supper. New friends and members were won to us. The campaign recreated our church with its masterly challenge through Mr. Cooper's planning and execution of this first half of our long-range building fund campaign."

COMMUNITY METHODIST CHURCH Jackson Heights, Long Island, N. Y.

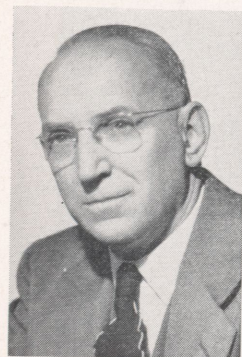
Membership: 1420
Campaign Objective \$120,000
Amount Subscribed 137,928
For New Educational Building

"It is the pleasure of the Expansion Committee to be able to report its complete satisfaction with Mr. Floyd C. Freeman's work as director. He had everything ready when needed, had answers or useful suggestions for all questions, and kept things moving at all times in the right direction. This can all be summarized by saying that we greatly appreciate the excellent job done by Marts & Lundy."

ST. JOHN LUTHERAN CHURCH Port Clinton, Ohio

Membership: 1200
Campaign Objective \$100,000
Amount Subscribed 121,590
For New Educational Building

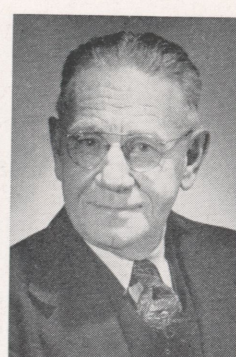
"Financially it was most successful, but the dividends of fellowship, enthusiasm and deeper spiritual life are the most significant to me as pastor. So far I have been privileged to meet Mr. Lundy and Mr. Wood and to work with Mr. Hadcock of your organization, and I am certain that with men of their high ideals and Christian philosophy the Lord will continue to bless your very efficient organization. I am certain we never, never would have attained the phenomenal success we did attain without your guidance and counsel."



Arthur L. Taylor



Arthur B. Nicholls



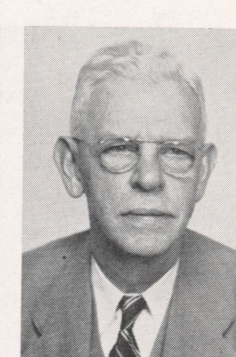
Charles F. Coykendale



Charles A. Herschleb



Edward M. Condit



Alexander Thompson

ST. JOHN'S LUTHERAN CHURCH Bellevue, Ohio

Membership: 846
 Campaign Objective \$ 85,000
 Amount Subscribed 108,074
 For New Educational Building

"Financially, the campaign has exceeded our highest hopes. What we never realized was that this effort would have such a tremendous impact upon our people in other ways. It deepened their insight into God's work. It proved to us that a lot of little people can do a big work with the right guidance and inspiration such as Mr. Wood brought to us."

ROYSTER PRESBYTERIAN CHURCH Norfolk, Virginia

Membership: 630
 Campaign Objective \$ 90,000
 Amount Subscribed 108,135
 For New Educational Building

"The results have surprised even the most optimistic. Beyond the goals are the significant intangibles. Our men have become acquainted and welded into a fellowship of Christian friends. Enthusiasm has been generated. There is no doubt that the financial campaign directed by Mr. Cooper has affected the course of this church for the years to come."

ST. PAUL'S LUTHERAN CHURCH Dearborn, Michigan

Membership: 1215
 Campaign Objective \$100,000
 Amount Subscribed 100,479

"Our campaign organization drafted an unusual resolution in which Mr. Dudley was awarded a special degree, 'D.D.—Doctor of Drives.' It reads in part as follows: 'This is to certify that because of the outstanding services rendered in the direction of the drive for the Expansion Fund, Mr. Harold C. Dudley has been awarded the honorary degree of Doctor of Drives, and *This Is Furthermore to Certify* that the firm of Marts and Lundy, Inc., is to be commended for having in its organization a man so congenial and conscientious, Christian and capable as Dr. Dudley.'"

CHRIST METHODIST CHURCH Cleveland, Ohio

Membership: 1620
 Campaign Objective \$81,000
 Amount Subscribed 90,500
 For New Educational Building

"Beyond the money raised, the spiritual rejuvenation in our

church was equal to a great revival. It is reflected in every department of our activity. The power of this campaign directed by Mr. Wood has deepened the interest of our people, engendered enthusiasm and enhanced the fellowship of our church beyond measure."

EMANUEL LUTHERAN CHURCH Marion, Ohio

Membership: 1500
 Campaign Objective \$150,000
 Amount Subscribed 190,151
 For New Educational Building

"I think that any church would be penny wise and pound foolish if they did not secure your services to guide them in a project of this kind."

CHRIST EPISCOPAL CHURCH Greenwich, Connecticut

Membership: 2000
 Campaign Objective \$100,000
 Amount Subscribed 150,502
 For Commemoration Fund

"I very honestly and most sincerely think that any church or institution which is fortunate enough to engage you and secure the services of Mr. McTyier will be amply repaid by following your directions and cooperating with you loyally and heartily."

MARKET STREET PRESBYTERIAN CHURCH Lima, Ohio

Membership: 1034
 Campaign Objective \$165,000
 Amount Subscribed 165,316
 For New Sanctuary

"It was a delight to us here in Market Street Church to go over the goal we had set. I know it was a surprise to many but we had excellent cooperation from the entire congregation. Your representative, Bayard Skilling, did an excellent job."

EPWORTH METHODIST CHURCH Marion, Ohio

Membership: 1700
 Campaign Objective \$70,000
 Amount Subscribed 78,000

"Your organization has just closed a very successful financial campaign in Epworth Church. Mr. Frank Wood planned carefully and executed wisely and gave very good leadership throughout the two months he was with us. I want to thank you personally and for the church for a job well done through your organization."

Do Marts & Lundy Church Campaigns Reach Their Goals?

Listed below are the 100 churches for which the firm has most recently conducted campaigns with goals totaling \$10,941,860. The total amount raised for them was \$12,026,816, or \$1,084,956 in excess of their combined goals. Eighty-five of these churches reached or over-subscribed their announced goals.

Akron, Ohio First Presbyterian	Douglaston, L. I., New York Community Church	Middletown, New York Webb-Horton Memorial	Roseville, Michigan St. Mark's Lutheran
Ann Arbor, Michigan First Congregational	Floral Park, L. I., New York Floral Park Methodist	Milburn, New Jersey Wyoming Presbyterian	Royal Oak, Michigan The First Methodist
Arlington, Massachusetts Trinity Baptist	Florence, South Carolina Central Methodist	Milwaukee, Wisconsin Evangelical Lutheran	Salisbury, North Carolina First Methodist
Asheville, North Carolina First Presbyterian	Flushing, L. I., New York Church on the Hill	New Philadelphia, Ohio Emmanuel Lutheran	Scarsdale, New York First Congregational
Bayside, L. I., New York Bayside Community	Fort Worth, Texas St. Stephen Presbyterian	Newport News, Virginia Chestnut Ave. Methodist	Sidney, Ohio First Methodist
Bellevue, Ohio St. John's Lutheran	Glenview, Illinois Glenview Community	Norfolk, Virginia Epworth Methodist	Spartanburg, South Carolina Bethel Methodist
Bethlehem, Pennsylvania First Presbyterian	Greenville, Pennsylvania First Methodist	Larchmont Methodist Royster Memorial	Springfield, Ohio First Lutheran
Brentwood, Pennsylvania First Presbyterian	Greenwich, Connecticut Christ Episcopal	North Adams, Massachusetts First Baptist	Sumter, South Carolina First Presbyterian
Brooklyn, New York Concord Baptist	Harrisonburg, Virginia Asbury Memorial	North Canton, Ohio Community Christian	Teaneck, New Jersey Presbyterian Church of
Cambridge, Ohio First Methodist	Methodist	Nutley, New Jersey St. Paul's Congregational	Teaneck
Camden, New Jersey Grace Baptist	Haverhill, Massachusetts First Baptist	Portsmouth, Virginia Monumental Methodist	Tenafly, New Jersey Presbyterian
Canton, Ohio First Methodist	Jackson Heights, L. I., N. Y. Community Methodist	Simonsdale Presbyterian	Toledo, Ohio Bethel Lutheran
Canton, Ohio First Presbyterian	Ho-Ho-Kus, New Jersey Community Church	Port Arthur, Texas First Presbyterian	Epiphany Lutheran
Centralia, Illinois First Methodist	Kenosha, Wisconsin Trinity Lutheran	Port Clinton, Ohio St. John Lutheran	Washington, D. C. Northminster
Charlotte, North Carolina Christ Episcopal	Lancaster, Ohio St. Peter's Evangelical	Pittsburgh, Pennsylvania Pleasant Hills Com-	Presbyterian
Claremont, California Claremont Church	Lutheran	munity Presbyterian	Sherwood Presbyterian
Cleveland, Ohio Christ Methodist	Larchmont, New York Larchmont Ave. Church	Plainfield, New Jersey First Presbyterian	Wayland, Massachusetts Trinitarian
Columbia, Tennessee First Presbyterian	Lawrenceville, New Jersey Presbyterian Church	Quincy, Illinois First Union	Congregational
Columbus, Ohio Broad Street Methodist	Lima, Ohio Market St. Presbyterian	Red Bank, New Jersey First Baptist	Wayne, Pennsylvania Wayne Presbyterian
Coshocton, Ohio Grace Methodist	Little Neck, L. I., New York Community Church	Richmond, Virginia Reveille Methodist	Westerly, Rhode Island Central Baptist
Dallas, Texas Munger Place Methodist	Lynchburg, Virginia Fort Hill Methodist	Church of the Holy	Westerville, Ohio Westerville Methodist
Dearborn, Michigan St. Paul's Lutheran	Lynn, Massachusetts Washington St. Baptist	Comforter	Westfield, New Jersey First Methodist
Denton, Texas First Presbyterian	Margate, New Jersey Community Baptist	Trinity Methodist	First Baptist
Des Moines, Iowa First Baptist	Marion, Ohio Emanuel Lutheran		St. Paul's
Detroit, Michigan Bushnell Congregational	Epworth Methodist	Ridgewood, New Jersey Methodist	Whittier, California Plymouth Church
Dobbs Ferry, New York South Presbyterian	Melrose, Massachusetts Highlands	River Edge, New Jersey First Congregational	Wood Ridge, New Jersey Presbyterian
	Congregational		
	Memphis, Tennessee Buntyn Presbyterian		

TOTAL OBJECTIVES \$10,941,860
TOTAL RAISED 12,026,816

Code of Ethics

The Code of Ethics, adopted by Marts & Lundy at their beginning in 1926, has guided the firm through nearly twenty-eight years of quality leadership in the fund-raising profession.

- I. We will take no campaign the purpose of which we cannot approve.
- II. We will take no campaign which in our best judgment is not possible of success.
- III. We will direct no philanthropic campaigns on a percentage basis, for to do so would create the impression in the minds of the volunteer workers that our earnestness and zeal were for financial gain.
- IV. Having taken a contract, the interests of the client must come before our own.
- V. Our publicity shall be educational rather than of the ballyhoo or high pressure type.
- VI. Directors shall at all times conduct themselves as Christian gentlemen careful to do nothing which will be likely to offend anyone.
- VII. Directors shall give themselves whole-heartedly to the promotion of the campaign, utilizing every minute of every day in behalf of the campaign.
- VIII. Campaigns should be conducted upon such a high plane that there will be three results:
 1. The constituency of the institution shall become thoroughly familiar with its character, ideals and objectives;
 2. The financial objective shall be reached;
 3. Such good will for the institution shall be built that will result in great good in future years.

If in your church fund-raising program you want to apply the principles and experience reported in this booklet, write to

MARTS & LUNDY, Inc.

521 Fifth Avenue
New York 17, New York

or

507 Harter Bank Building
Canton 2, Ohio

Additional booklets or answers to specific questions will be sent to you on request without obligation.

CHARTER MEMBER OF THE AMERICAN ASSOCIATION OF FUND RAISING COUNSEL

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