

About our CLIENTS' PROGRESS:

- **Adult Day Center of Somerset County** has entered into a \$1.5 million campaign to build a new 'campus' facility to serve the seniors and disabled adults of Somerset County. Unprecedented gifts have been committed to the campaign, including major gift commitments from Aventis Pharmaceuticals and Ethicon; Inc. Jeff Macaulay serves as Executive Director.
- **Algonquin Arts**, Manasquan, NJ has raised \$900,000 towards a \$2.5 million capital campaign goal. This includes a \$450,000 grant from the Ocean First Bank Foundation. Fran Drew is Executive Director.
- **Bristol Hospital**, Bristol, CT renewing with SBA for its 12th year of counsel, Bristol Hospital is now designing a 50 member council of community trustees with the responsibility of promoting Planned Giving. Tom Kennedy is CEO.
- **The College of St. Elizabeth**, Convent Station, NJ renewing with SBA for its 10th year, the college has reached \$7.4 million towards its \$15 million dollar campaign to build a Fine and Performing Arts Center. Sister Francis Raftery is President.
- **Catholic Charities**, Diocese of Trenton has raised \$200,000 as a result of a new gifts initiative. Catholic Charities has also been recently cited for their assistance to 9-11 families in the Gail Sheehy book, Middletown, USA. Francis Dolan is the Executive Director.
- **Capuchin Province of St. Mary**, New York, NY has raised \$950,000 towards a \$1.1 million dollar campaign goal. The goal should be exceeded in 2004. Father Francis Gasparik, OFM, CAP serves as chair for this campaign.
- **Coldwell Banker Real Estate Company**, Parsippany, NJ has kicked-off their 100-home for Habitat for Humanity build initiative at a national convention in Las Vegas, assisted by SBA. This will be a nationwide effort between Coldwell Banker Real Estate and Habitat for Humanity, International. Alex Perriello is President/CEO.
- **Holy Cross High School**, Delran, NJ has increased its Annual Fund to \$112,000 and is also in receipt of \$127,000 towards a library/media center. SBA is also spearheading Public Relations and Admissions efforts. Joseph Lemme is Principal.
- **Little Hills / Alina Lodge**, Blairstown, NJ raised \$2.3 million dollars in 2003. They have received their first seven-figure gift and a \$100,000 challenge grant from the Hyde and Watson Foundation. Mark Schottinger is Executive Director.
- **Newark YMWCA**, Newark, NJ about to proceed with a feasibility study to determine potential for a \$10 million dollar Capital Campaign. Milton Harrison is Executive Director.
- **Newton Memorial Hospital Foundation**, Newton, NJ is nearing completion of its \$6 million Capital Campaign. SBA is proud to feature NMHF in its Spring 04 Newsbrief and on our website homepage – www.semplebixel.com. Stanley Koza is President.
- **Plainfield Library**, Plainfield, NJ SBA begins strategic counsel of a \$1.0 million renovation campaign for the library as part of an overall \$4 million initiative. To date, \$3.0 million has been received through public funding. Joseph DaRold is Library Director, Kate Mason serves as Board President.
- **St. Anthony's High School**, Jersey City, NJ has received several 6 figure gift commitments to the \$10 million campaign for a new gym, science labs and library. Recruitment of steering committee ambassadors is well underway. Tom Breen is President of Board.
- **St. Joseph High School**, Metuchen, NJ has raised \$7.2 million. A Gala Reception to the unveiling of the Donor Wall, which honors contributors, will take place on Saturday, April 24th. A new feasibility study is underway to Endowment and Renovation of the Brother's Residence. Brother Dennis Wermert, S.C., is President.
- **St. Peter's the Apostle Church**, New Brunswick, NJ is finishing the \$2.0 million dollar feasibility study for restoration and repair of its 150 year-old building. Father Joseph Curry serves as pastor of the church.
- **Union County Education Services Foundation**, Westfield, NJ proceeds with its major fundraising event, featuring heavy-weight contender Gerry Cooney. This event, originally scheduled for December, has been rescheduled due to an early winter snowstorm. The new date is Saturday, April 24th. Over 400 people are expected to attend. SBA also working on board development and is seeking funds to upgrade computers at the Commission's special needs school.
- **Visiting Nurse Association of Central Jersey**, Red Bank SBA recently completed a Resource Development Assessment (RDA) for this organization as part of strategic counseling. SBA also has been retained for Executive Search. Mary Ann Christopher is President and CEO. ■

**SBA,
WORKING
WITH THE BEST...**



**American Association
of Fundraising Counsel,**
AAFRC, is an association for
consulting firms composed of 37
firms nationwide. Founded in
1935, it embraces the highest
ethical standards and maintains
a strict code of fair practices.
In 2002, AAFRC member firms
served 66 clients in New Jersey.
Of those 66 non-profit
organizations, SBA had the
privilege of serving 30.

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WILL BE A STRONGER,
MORE SUCCESSFUL
ORGANIZATION.

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Newton Hospital Foundation How They Met the Challenge

September 11th, 2001 – members of the Newton Memorial Hospital Foundation (NMHF) staff meet to discuss the October launch of the Hospital's first capital campaign endeavor in over a decade. News of the attack on the World Trade Center, a mere 60 miles away, reaches the conference room. The events of September 11th shook the nation's economy, confidence and forced many to re-evaluate the importance of emergency assistance, and community spirit. With this in mind, David Bixel, president of Semple Bixel Associates Inc., retained as counsel to NMHF, advised holding off with an official capital campaign launch for one full year – October 2002.

Despite that delay, and the volatile political and economical climate that followed, NMHF lies within reach of their original \$6.0 million goal – proving that tenacity, experience and community awareness are the cornerstones of a successful capital campaign. This campaign marks the largest ever undertaken by the Hospital.

Located in the northwestern corner of New Jersey, Newton Memorial Hospital serves residents from three separate states: NJ, NY and PA. The 162-bed short term, acute care facility has witnessed a surge in patient numbers with the needs of the surrounding community growing at a steady rate. President and CEO, Dennis H. Collette explains that Newton Memorial Hospital has experienced over 10,000 ER patient visits from 1994 through 2001. Projected growth over the next 10 years is expected to reach 40,000 visits.

Semple Bixel Associates (SBA) asked Newton Memorial Hospital to provide insight into how the hospital was able to attain such significant fund-raising goals. The following is an interview with Capital Campaign Co-Chair, Mark Avondoglio, (Vice President and General Manager, Perona Farms), Stanley Koza, President (NMHF), Brian Grace, Director of Public Relations (NMH), Diane Brennan, Director of Development (NMHF), and Debra Solow, Fund-raising Officer (NMHF).

SBA: What were the initial strategies employed to help get this campaign started?

NMHF: With the announcement of the campaign delayed for one year, it gave us a chance to see how the role of a hospital changed during the period following a national tragedy.

Although other charities may have taken a down turn, the local residents were beginning to see the value of having state-of-the-art healthcare and capable emergency services closer to home. People wanted to know that the hospital was ready to handle a crisis, and able to expand to accommodate a growing population. During that interim period we also took the opportunity to quietly pursue our major campaign gifts.

There was generous outpouring from physicians and employees of NMH for this campaign. The physicians have closed in on their \$1 million challenge and the employees have already exceeded their original pledge of \$250,000.

SBA: What was the motivating factor behind this success?

NMHF: With both the physicians and employees, again, it was about the community. These people were not only giving to their place of employment; they were helping their own families and friends. Most of our doctors live in the area and the importance of demonstrating their financial leadership to the community at large was so essential that we wanted to capitalize on that as much as possible. The success of the physicians campaign also lies with the fact that Ronetco Supermarkets, Inc., headquartered in Ledgewood, NJ, announced a pledge of \$500,000 to the campaign. Ronetco then pledged an additional matching fund of \$250,000 contingent upon NMH physicians raising \$1 million toward the capital campaign.

On the advice of SBA, the Foundation decided to inject some fun into the employee por-

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Campaign mascot, "Norman B. Healthy" is attended by ER Chief of Surgery, Dr. Mattes and ER Nurse Karen Kuhens.

Newton Hospital: Continued from page 1

tion of the campaign. That fun came in the form of “Norman M. Healthy” – a stuffed bear mascot used for publicity, prizes and among other things – as ransom. We had pictures of poor Norman coming into the ER on a stretcher, being attended by our ER Chief of Surgery, Dr. Mattes. At one point, a creative employee decided to kidnap Norman, sending out a ransom note that requested \$200 in employee pledges for the safe release of Norman. It was great fun! After serving a publicity stint in employee publications, nametag pins and web pages, a tuxedo clad Norman was finally auctioned off as an incentive prize to a lucky employee.

SBA: What role did special events play in the campaign, if any?

NMHF: During the campaign, the Foundation increased special events and used them strategically to cultivate friends and donors. Special events were used to inform the community about new projects and buildings. The events have leveled off at three per year, with a fourth being added in April. The only change during the campaign was the flow of funds.

Brian Grace, Director of Public Relations & Marketing believes the use of the media played an important part in the campaign.



Campaign co-chair George Morville, Stan Koza, and Selective Insurance President/Chairman/CEO Greg Murphy at the Selective Insurance check presentation.

SBA: Brian, can you explain the impact and use of the media?

Brian Grace: There is no doubt that the community served by NMH has stepped forward with cash in hand to bring the \$6 million capital campaign close to the finish line at \$5.9 million. This was accomplished by the perseverance and hard work of the Steering Committee initially formed through the efforts of Stan Koza, President NMHF.

However, the Marketing Department would like to point out the significance of the media, which has been an important player in the campaign. Through each step, it has carried NMHF’s message to the public. Without this important step, it is possible we would be considerably short of our goal today instead of on the threshold of completion.

Clear Channel Communications Radio has been a powerful mechanism in reporting the various events and plateaus of the campaign. The New Jersey Herald has printed on a weekly basis every pledge release prepared by the Marketing Department, along with photos and always in a timely fashion. The Star Ledger, Daily Record, Straus Newspapers and, of course, the Herald have attended various important events and reported them with thorough and accurate information and photos. Other media that helped to get the word

out were Skylands Weekly (a local television show produced by Jerry Morelli of Mug Media), Pike County Dispatch, Pocono Communications, North Warren News and the New Eagle. Each have contributed valuable space to the campaign. Every one of these news sources did so without benefit of payment and in

some sense it became a way of helping to enhance their asset to the community.

It is no small accomplishment that the media has responded to the Marketing Department’s call to get the word out. Without these opportunities, how would the public be aware of the need for funds to carry out the vision of the Foundation? Our internal contributions by employees and physicians which has exceeded \$1 million is an example of the Marketing Department’s belief that this was influenced in large measure by the media’s constant reporting.

SBA: One of the most impressive details of this campaign is the fact that your Steering Committee was 194 strong. How does the Foundation explain this?

NMHF: Well, simply put – if you don’t ask, you won’t get participation...we asked! The real credit goes to Stanley Koza, President of NMHF. Stanley’s knowledge of the constituents and the community as a whole enabled him to create a list of 200 prospects for the steering committee. His confidence in the validity of this list was key. Of the 200 people asked to take a leadership role, 194 accepted. We have a unique community here. It’s multi-generational and it has a small town feel. The grandson of the Hospital’s original land donor sits on the Board. It’s not uncommon to include the son or daughter of retired Trustee on the Board. This long-term commitment of our leaders is what sets us apart. Stanley Koza has served as CFO for Newton Memorial Hospital for 33 years, making him the longest running Hospital CFO in NJ history. He understood that it had been ten years since NMH reached out to the community for a capital campaign. Both he and Dave Bixel (SBA) also realized that following September 11th, people were looking for local comfort and togetherness. This is the type of know-how that only comes from years of experience.

SBA asks Campaign Co-Chair Mark Avondoglio’s opinion about the campaign.

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The Community Speaks at Newton Hospital A Message from the President, Dave Bixel...

For those who think civic life is a thing of the past, I urge you to visit Sussex County and its highly

respected Newton Memorial Hospital. A feasibility study for a \$6.0 million dollar campaign to expand emergency and cancer services revealed a potential for strong financial support. But it revealed something else, somewhat surprising in an era where technology knows best. Literally hundreds of Sussex County citizens were ready, willing and able to devote time, energy and money to assure vital services for their community.

One letter to friends and donors drew nearly 200 volunteer commitments. And so Newton Hospital and its philanthropic arm, the Newton Memorial Hospital Foundation, formed a

Steering Committee of 194 citizens. Of those, 90% attended solicitation training sessions, spoke to community groups, opened doors to potential benefactors and provided sources for publicity. Over 50 participated in prospect review sessions. Most importantly, every sector of the Sussex County Community felt the presence of a capital campaign.

And the results? Over \$6.0 million in pledges, several seven figures gifts, major corporate and foundation support, a national challenge grant, and hundreds of smaller gifts from every sector in the community. Looking for a community? It's in Sussex County, where ground has been broken for a new emergency center, and residents can now avail themselves of needed cancer treatments.

Newton Hospital: Continued from page 2

SBA: As a local entrepreneur, a veteran of many charitable campaigns, what is distinctive about the NMHF campaign?

Mark Avondoglio: Lead gifts from Selective and Ronetco, long established and respected for generations, inspired the physicians, employees and the business and general community to action. This is attributed to the fact that Newton Memorial Hospital holds a special place in our lives and hearts and has done so since 1923.

SBA: With the final phases of the campaign around the corner, how do you keep the momentum going and what are some future activities of the Foundation?

NMHF: We have reached the \$5.9 million mark, so we are nearing the completion of this particular campaign. However, there are always many new programs on the horizon and many new ways for people to commit. For example, there will be a new emphasis on planned giving. People need information on

charitable gift annuities, legacy gifts, and other methods of planned giving. These are the current fundraising priorities. As for the Hospital, the Dialysis Center was opened last year and plans are underway to build a Cardiac Catheterization Lab among other projects. Medical technology develops at a fast pace and our community wants these new services and technologies 'close to home'.

Finally, we turn to Stanley Koza, President of NMHF, to ask his thoughts on the advantages of retaining Semple Bixel Associates as counsel during this process?

Stanley Koza: From the beginning, SBA was the right choice. The firm's command of fundraising and their years of history helped us stay focused, giving us the confidence necessary to achieve this unprecedented goal of \$6 million. SBA adapted to our style and needs. We couldn't be overly aggressive in Sussex County NJ, yet it was important to be tenacious. SBA was a hands-on firm, returning our phone calls within an hour's time. That is not typical in this day and age. In this unstable economy, faced with tragic national events, SBA was able to support us through the process by giving us the tools and confidence to reach our goal. ■

SBA WELCOMES... KATHLEEN DEDRICK!

■ **Kathleen Dedrick** brings 17 years of business and non-profit management experience to the firm of Semple Bixel Associates. In the early 1990's she rose to the level of vice president at Prudential Financial's corporate headquarters. While there, she became an expert in strategic planning, financial management, organizational design and leadership development. Kathleen spent the last five years providing needed management consulting services to New Community, a \$150 million nonprofit community development corporation. Resource development planning, organizational planning and operational improvement projects are among Ms. Dedrick's area of expertise.

DIRECT MAIL Tips and Tools for Today's Nonprofits

Let's face it, Direct Mail helps nonprofits to identify new donors and stay in touch with current ones. Over the years, Semple Bixel Associates has seen many great and a few not so great direct mail pieces sent from nonprofits. Given this and our experience with the direct mail industry, we take this opportunity to pass on some basic tips and tools for your office to use next time you get ready to send out a mailing.

Marketing pros know that in order to stay on the agendas of potential and present constituents, organizations must consistently be in front of their audiences. A good direct mail program includes a variety of mailings throughout the year—such as: the visibility mailing, the solicitation mailing, public relation pieces, volunteer mailings, special event invitations, and program expansion announcements. Most experts agree there is NO bad time to mail, with the exception of April tax time—for obvious reasons.

Is your database ready? Database “cleanliness” and correct targeting are key components to success. Eliminate duplicate household addresses. Include address correction endorsements on all mailings, and then follow through by cleaning your database when items are returned to you. Need database cleaning assistance? Try a “once-a-year” outsource to your local mail house—where use of address correction software insures that you are mailing to a true deliverable address. Ask mail house for the corrected database file, it is worth any extra charge you may incur.

Your image and message.

General rules to follow for solicitation mailings are:

- Ask for money, not support if that's what you really want
- Use short punchy sentences without a lot of adjectives and adverbs
- Use the words to convey an emotion—which is typically the level that you are appealing to.
- Use short paragraphs, boldface print, and subheadings on longer letters
- Try not to use the “Dear Friend” salutation, instead personalize with the recipient name. The executive director and/or board chair should add personal notes to as many letters as possible.

Postage and labor. This is an area where many nonprofits fall short. The mailing may be a success, but the time and expense involved can eat a large chunk out of the profits. Avoid this scenario by taking a closer look at the costs. Know that it typically takes a staff person or volunteer 6 hours to fold, stuff and label 1000 envelopes. Include breaks, ringing telephones and this easily turns into two complete days.

Some areas to explore:

- Is it possible to invest in a small folding machine? Automating the folding and envelope stuffing process will reduce your labor costs significantly. Depending on your needs and the features, equipment cost will range from \$300 to \$5,000. For mailings averaging 2,000 pieces+ per month, consider outsourcing—for maximum efficiency.
- Shop around for the best postal rates. Postage often relies on qualifications in order to determine your best rate. **Refer to Tip Box, for a quick reference on rates and ask these questions:**
- Are you a nonprofit—have you signed on for the permit to use lower nonprofit postage rates? These rates are up to 30% lower than a first class letter.
- How many pieces are you mailing? If you are sending over 200 pieces or 50 lbs. in one mailing, try Bulk/Standard mail. This rate case can reduce postage by 50%, but delivery may take up to 10 days.
- Larger “in-house” mailers would be wise to investigate postal software. Compare savings versus the purchase of these products. As a mailer, you represent revenue to your local post office, advice and customer service come with the territory of being their customer. In all cases, where postal software is used to sort and print the addresses and barcode, costly address labels are eliminated, and postal rates are significantly reduced.
- The weight of your mail piece—make the most of the postal rate by stuffing as much material as possible for the price. For example, Standard mail is the same price for up to 3.3 ounces. For First Class mail, watch out for added, costly ounces during the design stage when planning paper stock, extra inserts. Extra weight adds 23¢ per ounce.

Reply envelopes. Business reply envelope accounts work better for nonprofits than pre-stamping or pre-metering your solicitation

mail. (eliminate paying for the non-replies). With business reply envelopes:

- Cost = 30¢ handling charge + postage for all returns
- Expecting over 1,400 envelopes back annually? Use Advance Business Reply Account—the annual permit is \$300, but the per piece handling charge drops to 8¢
- **Tip alert!** Include message on reply envelope that requests a stamp as a donation. Save the postage and give donors a quick way to help! You'll be surprised at the response and how the savings add up! (you will need a special endorsement from post office to include this on the envelope).

Final Thoughts: With a little patience and attention to details, your direct mail program can become more efficient. Remember to:

- Start with a clean & correct database
- Write in concise manner, with emotion
- Compare labor costs /discount postage with outsourcing /in-house equipment
- Avoid last minute decisions—spec your mailing piece early in the process. ■

POSTAGE TIPS:

- **For heavier mail** in the form of binders, videos, and books, and CDs, check out other services such as: Media Mail, Bound Printed Matter or Parcel Post. First Class Mail does not always have to be your first choice. A comparison of a 5 lb package:
Priority = \$5.85
Media mail/Book Rate = \$3.10
Bound Printed Matter= between \$2-\$4
Parcel Post = \$4.45
- **Nonprofit / Standard Mail Rates** Permits for these rates are required. A comparison of a 1 ounce letter:
First Class = 37¢
Standard mail = 26.8¢
Nonprofit = 16.5¢
(ask your local mail house if you can mail through their Bulk Rate permit).
- **Reduce the cost of labels** and the “look” of Junk Mail by either printing address directly on the outside envelope, or by using window envelopes.