

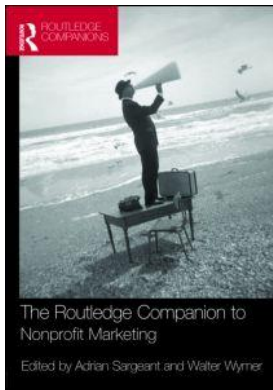
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Adrian Sargeant, Walter Wymer

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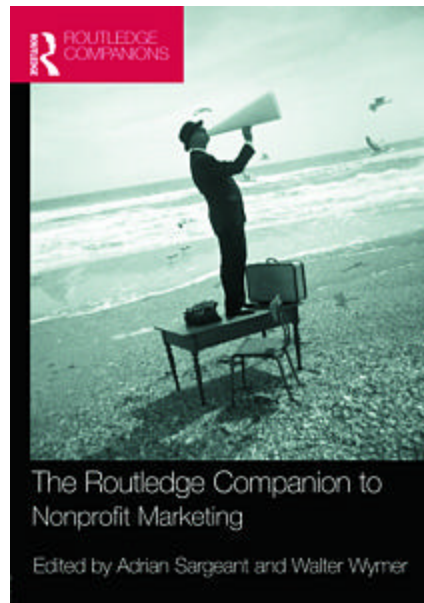
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Introduction: the growth of a discipline

Adrian Sargeant and Walter Wymer

Welcome to *The Routledge Companion to Nonprofit Marketing*. After forty years of academic debate and research, it seems timely to conduct a review of the current state of research in this field and to highlight the challenges and opportunities those of us working and writing in this field will face in the future. In commissioning our 25 chapters, we have sought to provide a broad coverage, with contributions from leading nonprofit scholars in a variety of different countries. It is our hope that the *Companion* will become an invaluable reference tool for graduate students and researchers and develop with subsequent editions into a chronicle of the development of the body of knowledge. In this brief introduction, we begin this process by charting the development of nonprofit marketing, thereby setting the current work in its historical context.

Just as the origins of marketing can be traced back to the earliest forms of trade, nonprofit marketing, too, is far from a new idea, particularly in the realm of philanthropy, where Mullin (1995) charts the significance of organized fundraising activity to early Jewish charity. In this tradition, individual volunteers were clearly assigned within each community to take responsibility for specific fundraising tasks, taking into account the needs and situation of each prospective group. The use of the mail for the purposes of fundraising also has a surprisingly long history. Indeed, there is evidence that professional coaching in the development of fundraising letters has existed since the Middle Ages. A fourteenth-century ‘fundraising’ handbook developed by monks at a Cistercian monastery in Austria, for example, advocated that an applicant’s letter must consist of:

- ‡ a honeyed salutation;
- ‡ a tactful exordium (an introduction to the purpose of the application);
- ‡ a narration (to set the scene with a description of the present situation or problem);
- ‡ a petition (the detailed presentation of the application); and
- ‡ a conclusion (a graceful peroration).

The monks even went so far as to supply twenty-two model letters to illustrate the application of this approach, each of which, on the basis of their experience, was framed to offer a different justification for the merit of philanthropy. These included ‘generosity to avoid ridicule’; ‘the

wealthy's obligation to give'; 'do as you would be done by'; 'to be kind is better than being an animal', and so on (Sargeant and Jay 2004).

As many readers will already be aware, Kotler and Levy (1969) are credited with opening the academic debate on the relevance of marketing to nonprofit organizations. They argued that marketing had for too long been regarded as a narrow business function and rebuked both academics and practitioners for ignoring the broader relevance of marketing ideas, or considering only specialized applications, such as public relations. At the time, their ideas met with some discussion in the literature, particularly in the early 1970s (see, for example, Luck 1969; Ferber 1970; Lavidge 1970; Ardnt 1978). Lovelock and Weinberg (1990) argue that the debate 'fizzled-out' in the latter part of that decade, as marketers became more concerned with other variants of their discipline and in particular turned their attention to the issue of whether service marketing might be any different from the marketing of products. Kotler and Levy's revised definition of marketing as 'serving human needs and wants sensitively' (Kotler and Levy 1969:15) was no longer controversial.

In 1971 the *Journal of Marketing* provided an entire issue devoted to marketing's social/ environmental role and number of empirical articles then followed (see, for example, Meade 1974; Miller 1974; Smith and Beik 1982; Schlegelmilch 1979). It was not until the early 1980s, however, that the first generic nonprofit marketing textbooks were to appear, with work by Rados (1981), Kotler and Andreasen (1982) and Lovelock and Weinberg (1989) being particularly noteworthy. Textbooks also began to appear in the fields of healthcare (Kotler and Clarke 1986; Cooper 1979; Frederiksen *et al.* 1984) education (Kotler and Fox 1985), the arts (Mokwa *et al.* 1980), the marketing of ideas (Fine 1981) and social marketing (Manoff 1985; Kotler and Roberto 1989). It is interesting to note that the only major facet of nonprofit marketing that lacked a formal textbook was the topic of fundraising. It was not until 2004 that this gap was to be filled (Sargeant and Jay 2004).

The 1980s and early 1990s saw the introduction of a number of scholarly journals, including the generic *Journal of Nonprofit and Public Sector Marketing* and *International Journal of Nonprofit and Voluntary Sector Marketing*. Sector-specific journals also emerged including *New Directions in Philanthropic Fundraising*, *Journal of Educational Advancement*, *Health Marketing Quarterly*, *Journal of Health Care Marketing*, *Journal of Marketing for Higher Education* and *Social Marketing Quarterly*. It was also not unusual to find journals from other disciplines printing studies from the field of marketing. Andreasen and Kotler (2003) note studies in fields as diverse as library science, art history and hospital management.

The 1990s also saw an explosion of conference interest in the topic with nonprofit tracks being introduced to many American Marketing Association, Academy of Marketing Science and Atlantic Marketing Association events and in Europe the Academy of Marketing and European Marketing Academy (EMAC) conferences. Marketing papers were also becoming commonplace at the Association of Researchers in Nonprofit and Voluntary Action (ARNOVA) events in the USA and at the ISTR (International Society for Third Sector Research) biannual conferences. The following decade saw the introduction of a series of sector-specific conferences, including the American Marketing Association's annual nonprofit event and in Europe the Annual Colloquium on Nonprofit, Social and Arts Marketing hosted by Henley Management College and London Guildhall (now Metropolitan) University. A nonprofit conference was also introduced in Australia where the Australian Non-profit and Social Marketing Conference (ANSMAC) is now a well-attended annual event.

Concomitant with the level of academic interest in the topic has been a rise in the number of universities offering courses in nonprofit management. Indeed, the ten years to 2006 have seen

a tripling in the number of universities in the USA offering courses in this field (Young 1999; Mirabella 2006). Mirabella (2006) notes:

The current universe of programs that focus on the management of nonprofit organizations found over two-hundred and fifty-five colleges and universities with courses in nonprofit management. Seventy-two programs offer noncredit courses such as Fundraising, Managing Your Nonprofit Organization, and Governance. Many of the fifty-seven programs with courses through continuing education, have similar courses designed for the nonprofit manager, including Strategic Planning, Human Resource Management and Financial Management. An additional one-hundred and twenty-nine schools offer at least one course for undergraduate credit ... (and) one hundred and fifty-seven colleges and universities have at least one course within a graduate department.

The picture elsewhere is less rosy. In the UK, for example, fewer than 2 per cent of further and higher education institutions were found to be offering accredited courses in nonprofit marketing and/or fundraising in 2006 (Sargeant *et al.* 2006). A similar analysis remains to be conducted of programmes in other countries, but a brief web search conducted for this volume suggests that considerable opportunities to expand provision still exist. Indeed, although our foregoing discussion makes it clear that there has been a growth in nonprofit scholarly output, there is less evidence that this is being effectively communicated to those who would benefit.

Of course one could argue that marketing need or societal issues requires identical skills and thought processes to the marketing of cars, perfume and other consumer products. The requirement to consider nonprofit marketing as a distinct discipline in its own right is thereby greatly diminished. But is it? Is it really possible to adopt commercial marketing practice to making a potential donor aware of a starving baby or encouraging a committed smoker to quit? Does it make sense to regard nonprofit marketing as a distinctive discipline?

As long ago as 1977, the eminent marketer scholar Shelby Hunt provided some insight into this issue, arguing that the profit–nonprofit dichotomy would be valuable until:

1 The broadening of the marketing concept was no longer regarded as controversial.

2 The nonprofit sector and the issues that must be addressed therein was completely integrated into all marketing courses and not treated as a separate subject.

3 Nonprofit managers perceived their organizations as having marketing problems.

4 Nonprofits established marketing departments (where appropriate) and employed marketing personnel.

The past thirty years have seen a good deal of progress. The adoption of marketing ideas in the nonprofit arena is certainly no longer controversial and many nonprofits now employ marketing personnel to address marketing issues. The second of Hunt's tests seems the only area of difficulty. Nonprofit marketing has yet to be properly integrated into 'mainstream' marketing courses, quite possibly because it is seen as being of less interest to the majority of marketing students and/or employers. While this may be intuitive, it fails to reflect the pattern of the majority of modern careers, where the majority of individuals will now work for a variety of employers and quite possibly in a variety of different contexts. The need for a broader perspective on the subject has therefore never been greater. Indeed, it is also the case that with an increasing number of nonprofits creating professional marketing and/or fundraising

positions, it may be in the career interests of many graduates/undergraduates to develop expertise/ knowledge that would allow them to compete for jobs in this sector.

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That is not to say, however, that we necessarily agree with Shelby Hunt that it is desirable that nonprofit and for-profit marketing be merged. While we would certainly applaud greater coverage of the subject in generic marketing courses and modules, we believe that the body of knowledge that comprises nonprofit marketing is beginning to develop to a point where it would be difficult to do more than merely scratch the surface of the topic in any such course. The bodies of knowledge, in particular, for fundraising/volunteering and social marketing are now well developed, as is the evidence that simply applying for-profit ideas to these contexts would be sub-optimal in the extreme. There is thus a need to teach perspectives and tools/ techniques that are more applicable to the nonprofit sector and for these to be grounded in and substantiated by an ongoing stream of high-quality research.

High-quality research ought to be directed in areas which provide the greatest need for nonprofit managers (Smith 1999). These areas still include individual fundraising, marketing to corporate supporters, volunteer recruitment and retention, using Internet technologies for effective marketing, social and advocacy marketing, public relations, and nonprofit branding and positioning (Wymer *et al.* 2006).

As discussed previously, the field of fundraising has only recently been credited with a formal textbook (Sargeant and Jay 2004). Fundraising is, however, a crucial marketing activity in many, if not most, nonprofit, non-governmental and charitable organizations. Marketing practitioners in these organizations could benefit by more research on how to better attract new donors (Gainer and Moyer 2004). For example, to whom should fundraising appeals be directed? Can donor markets be segmented in a manner similar to consumer markets? And, if so, how should donor markets be segmented? What variables and factors should be used to segment effectively donor markets? Can appeals be developed and delivered to donor targets with such segment differences in mind? Adrian Sargeant and Lucy Woodliffe have authored a reading on individual donor behaviour for this book to enhance our understanding in this area.

Perhaps one of the most critical areas in fundraising at the time of writing is retention. With many organizations routinely losing 50 per cent of their donors between the first and second donation there is an urgent need to understand more about the relationship dynamic in this context. Papers by Kevin Money (*et al.*) and Haseeb Shabbir illuminate this issue.

Planned giving, a subtopic of fundraising, is also of increasing importance to nonprofit managers. From the perspective of the nonprofit marketer, planned giving is:

A systematic effort to identify and cultivate a person for the purpose of generating a major gift that is structured and that integrates sound personal, financial, and estate-planning concepts with the prospect's plans for lifetime or testamentary giving. A planned gift has tax implications and is often transmitted through a legal document, such as a Will or a trust.

(NSFRE Fund-Raising Dictionary 1996:58)

Marketers need to better understand how to identify potential planned givers. They need to better understand the process that potential planned givers use in deciding whether or not to give and which worthy causes to support (Brown 1996). Paul Schervish has contributed a reading for this book on the motivations for giving by wealthy individuals, a frequent target for planned giving appeals.

Many nonprofit organizations organize special events for fundraising purposes. Marketers could benefit from research that adds to our knowledge on how to more effectively plan and organize special events. For example, what is the best type of event to develop? When to have

the event? Whom to invite? Under what circumstances should nonprofits solicit corporate event sponsors (O'Mahony and Polonsky 2006)?

In addition to fundraising from individual contributors, managing corporate support is emerging as an important marketing function. Corporate support of charities has changed considerably during the last fifty years, evolving from straightforward financial contributions thirty years ago to complex cause-marketing arrangements in which corporations derive marketing benefits from their associations with nonprofits (Himmelstein 1997; Wymer and Samu 2003). Kym Madden and Wendy Scaife have contributed a review of corporate philanthropy for this book.

Although there have been numerous works on cause marketing and other dimensions of business–nonprofit sector collaborations, much of this prior work has the corporate perspective in mind. More research is needed to enhance our knowledge of how to manage more effectively this marketing function for the nonprofit. For example, how does a nonprofit decide which business to target? How can smaller, local nonprofits attract business support? How can nonprofit managers manage more effectively their relationships with business supporters? How do nonprofit managers manage communications publicizing their business supporters? What are the audience effects from these communications?

Fundraising and attracting corporate support are two important marketing activities for nonprofit organizations which focus upon obtaining needed resources. Recruiting and retaining volunteers represents another important marketing activity (Wymer and Self 1999). Many challenges lie ahead for managers responsible for this form of marketing. The proportion of women in the employee workforce is at an all-time high and women typically comprise about two-thirds of the volunteer workforce. Modern culture is such that many people feel a constant state of time-poverty and economic pressure. Baby boomers are entering retirement. A new generation is coming of age, a generation feeling less responsibility for civic participation. How can younger individuals be recruited? What are their motivations for volunteering? What do they expect from the volunteer experience? Walter Wymer, Paul Govekar and Michele Govekar have contributed two readings on volunteer issues to this book.

To communicate with the coming-of-age generation, nonprofit managers will rely more heavily upon newer technologies. Interesting works on virtual volunteering (www.serviceleader.org) and e-philanthropy (www.ephilanthropy.org) have been harbingers in this area. However, the academic community needs to participate more fully in adding to our knowledge in using the Internet and related technologies as vehicles to achieving marketing goals. How can nonprofit managers more effectively use their Internet capabilities for fundraising planned giving, e-philanthropy? More needs to be known about how potential volunteers, contributors and other supporters use the nonprofit's website. What information are they seeking? How can appeals be directed more effectively on the nonprofit's website? With regard to volunteer marketing, how can the website be used to recruit and retain volunteers? Can the organization's Internet tools be used for volunteer/donor community building? Finally, how can the website be used more effectively as a public relations tool? The reading by Ted Hart addresses many of these issues.

Another area of great interest to the nonprofit sector is social marketing, the application of marketing concepts to influence positive social changes. Marketing campaigns directed to reduce smoking, pollution, obesity and unsafe sex are examples of social marketing. Changing human behaviour is challenging and complex. More research will always be needed to better understand how to influence behaviour. More research is also needed to deal with challenges faced by social marketers. Modern industrialized societies, populations that have been exposed to corporate marketing messages, often from a very young age, are often oppositional

to the

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objective of social marketers. Corporate advertising encourages people to over-consume, smoke, drink, gamble, eat convenience foods, and so forth. Social marketers must compete with corporate-marketing messages in this environment (Wymer *et al.* 2006). In this book, two critical readings on social marketing topics have been contributed by Gerard Hastings, Michael Basil, Ross Gordon and Laura McDermott.

In addition to the areas discussed previously, practitioners in different parts of the nonprofit sector have special challenges. There are too many to list in this brief introduction, but as an example, faith-based institutions represent the largest nonprofit subsector, yet have been the focus of surprisingly little research. Sandra Mottner reviews this literature and offers numerous suggestions for expanding the field. Equally, in the 1980s and 1990s, political marketing struggled to assert itself as a serious subject for academic study. Thanks to an explosion of interest in recent years, the appearance of textbooks and a number of journal special issues, the application of marketing to this field is no longer controversial. Jenny Lloyd and Jennifer Lees-Marshment, two of the leading thinkers in this area, have contributed chapters to this book, reviewing the current state of our knowledge and challenging the way that we view political parties and brands.

Throughout, this companion book presents readings by leading scholars in the field to present a body of work that deals with nonprofit marketing at both the conceptual and practical levels. Conceptual topics, such as developing a marketing orientation or customer–relationship management, are presented in a context specific to the nonprofit sector. Topics of practical importance, such as e-philanthropy or volunteerism marketing, complement the more conceptual subjects.

This companion book also balances the breadth and depth of nonprofit marketing. A broad variety of topics are addressed and, within specific subject areas, reviews are provided to give the reader a sense of the scope of our knowledge on that topic. However, in certain instances, readings with narrowly focused topics add depth to our coverage of nonprofit marketing. These more narrowly focused readings provide the reader with greater insights into special topics of interest to both researchers and practitioners. We commend them to you.

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