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**ABSTRACT**

This booklet provides an initial list of resources that development personnel in Catholic schools may explore as they build their plans and programs. Seven types of resources are identified. The first type includes books and periodicals on public relations, fund raising, foundations, estate planning, long range planning, student recruitment and selection, and the community power structure. The second type are organizations offering services related to alumni programs, communication, printing, data processing, direct mailing, fund raising, and program counseling. The third type consists of primary sources of public financial information about prospective donors. Locations of Securities and Exchange Commission offices are listed. Books recommended for purchase by development offices comprise the fourth type of resource; they include materials discussing biographies, financial information, corporations, foundations, government, tax data, publicity, directories, and periodicals. Services offered by the development office of the National Catholic Educational Association form the fifth resource group. The sixth type of resource provides information about private foundations; the booklet describes procedures to use in obtaining such information, including materials from the Foundation Center. The seventh resource describes the benefits and services offered to members of several national and local organizations with interest in development. (PGD)

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Produced by

*The Office of Development  
National Catholic  
Education Association*

Compiled by

*Dr. Robert J. Yeager*

**Resources**  
for Development



*National Catholic  
Educational Association*

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Material for some sections of this publication was provided by Dr. Robert L. Stuhr, Partner, Gonser Gerber Tinker Stuhr, 105 West Madison Street, Chicago, IL 60602. Through four years of consultation, Dr. Stuhr has provided guidance in the delivery of development education to Catholic institutions. He assisted in the initial outline of this publication.

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# INTRODUCTION

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**A** major function of development centers is establishing good contacts with publics who can enhance the status of a given institution or program. Development personnel are more successful as they have at hand the tools to uncover and promote meaningful relationships. This booklet provides an initial list of resources which development personnel need to explore as they build their plans and programs.

Materials have been chosen for this publication in response to requests received at the national office from many development offices in Catholic institutions. Sections are included here as representative. In no way do these materials represent that they are all inclusive. Hopefully they will guide the reader to further helpful materials and especially relationships with persons who will find an individual program or institution to their liking.

If this publication provides one more link of communication in the ongoing national conversation about the necessity of enhancing and promoting all aspects of Catholic education, it will be successful.

The National Catholic Educational Association and its Development Office present this material as being accurate. However, no endorsement is implied or intended for any of the materials or services listed here. The quality of such items must be determined individually by potential users.

# RESOURCE I

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come funds, contact Committee on Gift Annuities, 1865 Broadway, New York, NY 10023

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*Product Manager*

PRIMS, (Prospect Research Information and Marketing System) is a comprehensive fund raising software system specifically designed to provide support for the modern fund development office.

**Quodata Corp.**

266 Pearl Street  
 Hartford, CT 06103  
 203/728-6777

Ms. Ila Sunshine  
*Executive Assistant to the President*

Software which helps determine opportunities, conduct campaigns, report successes. Manages prospects, pledges, gifts, donor information. Enables efficient mass solicitations and productive contact with major constituencies.

**Jeffery R. Shy Associates, Inc.**

669 B Olde Towne Road  
 Williamsburg, VA 23185  
 804/253-2988

Mr. Virginia C. Ives  
*Director of Educational Services*

Educational Advancement Records System designed by advancement professionals who are familiar with the fund-raising needs of today's non-profit institutions

**Signature Systems by E.S.P. Systems, Inc.**

Lakewood Center, 3B  
 Star Rt. 14T  
 Locust Grove, VA 22508  
 703/972-2377

Mr. Harvey L. Huston  
*Sales Manager*

Automatic signature machines will sign your signature at a rate of 400-600 per hour. Also writes PS's or notes automatically. Feeds cut sheets or continuous forms of nearly any size



**Smith-Hemmings-Gosden**

3360 Flair Drive  
El Monte, CA 91731  
818/571-6600

Mr. Richard W. Felton  
*Senior Vice President*

Full service direct mail fund raising firm. We provide creative marketing, computer, production and lettershop services to nonprofit organizations.

**The Stelzer Company**

3821-71st Street  
Des Moines, IA 50322  
515/278-5253

Mr. Larry P. Stelzer  
*President*

Publisher of direct mail planned giving programs including four-color quarterly mailers, custom designed programs, wills and bequests mailers, professional newsletters and the "charitable giving course"

**Western Computing**

537 E. Osborn Rd.  
Phoenix, AZ 85012  
602/274-0383

Mr. Gary L. DeVelder  
*Marketing Representative*

Offers complete fund raising system for users desiring multi-user capabilities. Many other modules available to integrate with fundraising software. For 10,000-250,000 records.

**The Williamson Group**

129 Mt. Auburn Street  
Cambridge, MA 02138  
617/497-6848

Mr. Ben M. Snyder  
*Marketing*

Provider of computer software, hardware, training, consulting, and support for development, admissions, and business offices of independent secondary schools. The firm has over 150 clients across the United States and Canada.

**D FUND RAISING AND DEVELOPMENT****American Association of Fund Raising Counsel Inc.**

25 W 43rd St  
Suite 1519  
New York, NY 10036  
212/354-5789

Mr. John J. Schwartz  
*President*

A non-profit organization of professional fund-raising firms which maintain high ethical standards and adhere to a strict code of fair practices.

**American City Bureau**

9501 West Devon Avenue  
Rosemont, IL 60018  
312/696-1450

Mr. Gary E. Rounding  
*Vice President*

Conductor of developmental studies, provides resident campaign direction, designs endowment development programs, and offers advisory services related to the complete scope of philanthropic development.

**Barlow Associates, Inc.**

2504 Dover Lane  
St. Joseph, MI 49085  
616/429-2601

Mr. Edward D. Barlow, Jr.  
*President*

"Futures" oriented consulting to dioceses, parishes, schools, foundations. Counsel available in strategic planning, financial management, development. Mentoring and professional growth activities available for boards, advisory groups, administrators, and staff.

**Barnes & Roche, Inc**

1084 East Lancaster Avenue  
Rosemont, PA 19010  
215/527-3244

John P. Butler, III  
*President/Chief Operating Officer*

Institutional advancement consultants providing strategic and operational consultation in the areas of institutional planning, assessment and feasibility studies, annual, capital and planned gift programs; leadership development and training; computer applications; writing, organization and staffing of advancement offices for educational institutions and other non-profit organizations.

**Bentz, Whaley, Flessner & Associates, Inc.**

6800 France Ave., South, #559  
 Minneapolis, MN 55435  
 612/925-6046

Mr. Frank H. Bentz  
*Chairman*

Providing fund raising counsel to all types of non-profit organizations, including the Universities of Detroit and Minnesota.

**Bernd Brecher and Associates, Inc**

25 West 43rd Street, Room 820  
 New York, NY 10036  
 212/869-4646

Mr. Bernd Brecher  
*President*

Feasibility studies; strategic, long range and marketing plans, capital campaign management; endowment and planned giving; leadership development; case studies and proposal writing; searches and staff training.

**Brakeley, John Price Jones Inc.**

1600 Summer Street  
 Stamford, CT 06905  
 203/348-8100

Mr. George A. Brakeley, III  
*Executive Vice President*

Provides nonprofit organizations in the U.S. and overseas with institutional and financial planning; development and fundraising studies, capital-campaign management; and counseling on all facets of fund raising

**Thomas E. Broce Associates, Inc.**

P.O. Box 1652  
 Evergreen, CO 80439  
 303/674-2353

Dr. Thomas E. Broce  
*President*

Serves as consultants on fund raising for non-profit organizations. Service includes capital campaigns, total institutional advancement, volunteer organization and management.

**Browning Associates, Inc.**

25 Clifton Ave  
 Newark, NJ 07104  
 201/481-1850

Mr. Russell G. Browning  
*President*

Specialize in working with the independent school. Assist with planning, trustee functioning, administrative studies, admissions, publications, annual capital, deferred giving.

**Campbell and Company**

One East Wacker Drive  
 Chicago, IL 60601  
 312/644-7100

Mr. Donald A. Campbell, Jr.  
*President*

Full-service philanthropic development firm, specializing in counsel and management of capital, annual, and planned gift programs; campaign feasibility studies, marketing and development audits and plans, market research, and a full spectrum of communications services.

**Cargill Associates**

4701 Altramesa Blvd  
 P.O. Box 330339  
 Fort Worth, TX 76163-0339  
 817/292-9374

Dr. Olan H. Runnels  
*Vice President and Director of the Institutional Division*

Specialists in feasibility studies and capital campaign management, provides professional fund-raising counsel for schools, colleges and universities

**Catholic School Management**

24 Cornfield Lane  
 Madison, CT 06443  
 203/421-4789

Mr. Richard J. Burke  
*Publisher, Catholic School Management Letter*

Catholic School Management publishes the "Catholic School Management Letter" and "Catholic School Management—On Boards." The "Catholic School Management Letter" is a quarterly publication designed to assist administrators in the areas of financial management and development for Catholic schools. "Catholic School Management—On Boards" is a bi-monthly publication designed to provide inservice for board members, pastors and principals concerning the specific roles and responsibilities of Catholic elementary school boards

**Clardy & Associates, Inc.**

PO Box 531  
Isle of Palms, SC 29451  
803/886-5757

Mr. Cermette J. Clardy, Jr  
*President*

Counsel in fund raising and admissions primarily for smaller colleges and schools in the private sector. Also offer services in search and placement within development profession.

**Community Service Bureau**

3500 Oak Lawn, Suite 180  
Dallas, TX 75219  
214/526-5252

Mr Jim C. White  
*Executive Vice President*

Individually designed fund raising programs for universities, colleges, and secondary schools. Services include planning and counseling; implementation of full management of programs.

**Connecticut Bank & Trust Co, (CBT)**

One Constitution Plaza  
Hartford, CT 06115  
203/244-5806

Mr. John W. Dixon  
*Assistant Secretary*

A full range of investment management and trust services and enjoys a reputation in planned giving services, pooled income funds and charitable remainder trusts, that is second to none.

**Development Management Associates**

249 E. Ocean Blvd., Suite 712  
Long Beach, CA 90802  
213/436-2221

Ms. JoAnn D. Flowers  
*Marketing Representative*

Provides development and fund-raising feasibility and planning studies; capital campaign management, long-range planning, planned giving and leadership development.

**R. F. Dini & Associates, Inc.**

600 Jefferson, Suite 630  
Houston, TX 77002  
713/654-9210

Mr Robert E. Corder  
*President*

Works closely with each client to tailor services to particular needs and situations. We provide fund-raising feasibility studies, various levels of consulting involvement or full-time program management.

**Disclosure**

161 William St.  
New York, NY 10038  
212/732-5964

Mr. Michael Gruenberg  
*Marketing Specialist*

Provides business and financial information services on over 10,000 public companies who file annual and periodic reports with the Securities and Exchange Commission. These services include online databases, demand document delivery and document subscriptions on microfiche and paper copy. Annual reports on over 2,000 foreign firms are also available in microfiche and hard copy.

**Charles R. Feldstein and Company, Inc.**

1127 Euclid Avenue, Suite 705  
Cleveland, OH 44115  
216/579-9995

Mr. Morris Everett Jr  
*Vice President*

Provides fund raising counsel, public relations and communications services to non-profit cultural, educational, and community institutions.

**James W. Frick Associates, Inc.**

Suite 888  
St. Joseph Bank Building  
South Bend, IN 46601  
219/289-8989

Dr. James W. Frick  
*President*

A comprehensive college and university relations and fund raising firm which has worked with Catholic institutions in America and across the world.

**Fund-Raising Insitute**

P.O. Box 365  
8 Cavalier Drive, Rear  
Ambler, PA 19002  
215/628-8729

Mr. William F. Balthaser  
*Editorial Director*

One of the nation's major publishers of works on fund-raising techniques. Researches and reports on fundraising techniques through books, periodicals and educational meetings.

**Funds Transfer, Inc.**

224 Walnut Street  
Chattanooga, TN 37403  
615/265-5195

Mr. Daniel L. Chandler  
*President*

Administers pre-authorized checking and credit card charge programs for collection of contributions and tuition

**Richard P. Garrigan**

P.O. Box 31273  
Omaha, NE 68132  
402/553-0256

Mr. Richard P. Garrigan  
*Development Consultant*

Development consultation for Catholic dioceses, parishes, elementary and secondary schools. Services include building blue ribbon development committees, major gifts, foundations, public relations, alumni, estate planning

**Goettler Associates, Inc.**

580 South High Street, Suite 230  
Columbus, OH 43215  
614/228-3268

Ms. Linda V. Bryan  
*Director of Marketing*

An established fund-raising consulting firm specializing in intensive capital or endowment campaigns where goal is \$500,000 or more.

**Gonser Gerber Tinker Stuhr**

105 West Madison Street  
Chicago, IL 60602  
312/251-5819

Dr. Robert L. Stuhr  
*Partner*

Offers complete development consulting services to colleges, universities, preparatory and elementary schools, dioceses, and other philanthropic institutions.

**John Grenzebach & Associates, Inc.**

845 N. Michigan Avenue  
Chicago, IL 60611  
312/787-6690

Mr. Martin Grenzebach  
*President*

Offers a full range of development consulting services including: feasibility/development studies, capital campaign management, development program audits, on-going program counsel, systems support services, etc.

**Haas Cox & Alexander**

44 Broad St., Suite 404  
Atlanta, GA 30303  
404/525-4821

Mr. G. Douglass Alexander  
*Executive Vice President*

Conductor of major capital campaigns for over 400 clients in the Southeast since 1954. Offers a complete range of services including campaign direction, marketing, planned giving and counseling.

**Jerry A. Jarc and Associates**

The Catholic Center  
1031 Superior Ave  
Cleveland, OH 44114  
216/696-6525

Mr. Jerry A. Jarc

Catholic education consultant in endowments, planned giving, annual fund, alumni development, public relations, recruitment and planning. Assistance with starting, auditing and monitoring development offices

**Kersting, Brown & Co., Inc.**

45 N Broad Street  
Ridgewood, NJ 07450  
201/652-1030

Mr Donald L. Kersting  
*President*

Counseling on capital and annual development programs at educational institutions and medical centers

**Ketchum, Incorporated**

314 Chatham Center  
Pittsburgh, PA 15219  
412/281-1481

Mr George W. Rooney, Jr  
*Assistant to the President*

A full-range fund-raising counsel specializing in resident direction of capital and endowment campaigns with offices in Pittsburgh, Boston, Charlotte, Chicago, Dallas and Los Angeles

**Lavender/Rice & Associates**

4792 Grand Avenue  
Ojai, CA 93023  
805/646-7722

Mr. David G. Lavender  
*Partner*

Counsel on all aspects of fund raising, with emphasis on building new development offices and programs at independent schools, and in training new development officers

**Marts & Lundy Inc.**

1200 Wall St., West  
Lyndhurst, NJ 07071  
800/526-9005 201/460-1660 (New Jersey only)

Ms. Louise M. Blydenburgh  
*Vice President/Operations*

The firm provides counseling for development programs and campaigns; conducts studies; writing and design service, electronic screening and research services

**Len Meyer & Associates**

800 Grant, #101  
Denver, CO 80203  
303/821-7146

Mr Len Meyer  
*President*

Consultants in philanthropy, fund raising, marketing, communications. Addressing ongoing operational fund raising, capital campaigns, and planned giving programs. Assessment of current programs; design of new programs; development and implementation of comprehensive operating plan

**NCEA Financial Consulting Services**

24 Cornfield Lane  
Madison, CT 06443  
203/522-3169

Mr. Richard J. Burke  
*NCEA Financial Planning Consultant*

The NCEA Financial Consulting Services provide financial, marketing, management and development consultation services to Catholic elementary and secondary schools, as well as dioceses and religious communities. Specific areas of emphasis include long-range planning, case statement development, financial management, accounting, budgeting and bookkeeping, and comprehensive development programs.

**Robert E. Nelson, Associates, Inc.**

180 W Park Avenue, Suite #10  
Elmhurst, IL 60126  
312/832-8775

Mr. Robert E. Nelson  
*President*

Provides development counsel to not-for-profit institutions, primarily colleges and universities

**R&R Newkirk**

P.O. Box 1727  
Indianapolis, IN 46206  
800/428-3852

Mr Brent Blanner  
*Manager, Development Services*

Provider of state-of-the-art software, reference, training, promotional and other support services in the area of planned gift development

**Omaha Development Services**

3212 No. 60th Street  
Omaha, NE 68104  
402/551-2042

Rev. John A. Flynn  
*Director of Education, Archdiocese of Omaha*

Comprehensive summer development institutes for school personnel in Omaha/Sacramento. On-site one-day workshops, consultations.

**Payne, Wester, Forrester & Olsson**

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Hartford, CT 06103  
203/525-6610

Mr. Robert H. Forrester  
*Partner*

Full service fund raising management consulting. Providing campaign feasibility studies, development program credits, long range planning, program counsel, staff recruitment and training.

**Pentera, Inc.**

8650 Commerce Park Place  
Indianapolis, IN 46268  
317/875-0910

Mr. James R. Marshall  
*Executive Vice President*

A full service planned giving company. Services include customized promotional materials, shelf booklets, training seminars, and full range of technical and marketing consultations.

**Arthur D. Raybin Associates, Inc.**

P.O. Box 67  
Chappaqua, NY 10514  
914/238-8157

Mr. Arthur D. Raybin  
*President*

Firm specializes in capital campaigns for colleges, schools and other gift-supported institutions, emphasis on thorough pre-campaign studies and solicitor training, no geographical limitations

**Resource Development, Inc.**

3 Corporate Centre, Ste. 3-100  
Springfield, MO 65804  
417/882-7777

Mr. William R. Jester  
*President*

A financial consulting firm working in the areas of planned giving, endowment campaigns, and major donor solicitations.

**Ross, Johnston & Kerstizig, Inc.**

922 Broad Street  
Durham, NC 27705  
919/286-0721

Ms. Julie J. Clodfelter  
*Office Manager*

To review and evaluate all facets of planning, operation, strategy and techniques for development programs at non-profit institutions.

**Security Benefit Life Insurance Company**

700 Harrison  
Topeka, KS 66636  
800/255-2461

Ms. Rae Anthony  
*Regional Sales Vice President*

The contribution builder program promotes annual giving by enabling your donors to receive back, for their families an amount equal to their contributions

**Robert F. Sharpe & Company, Inc.**

5050 Poplar Avenue, Suite 1222  
Memphis, TN 38157  
800/238-3253  
901/767-2330

Mr. Robert T. Bridges  
*Vice President*

Complete services in current and planned gift development. Consulting to assist in designing or revitalizing planned giving programs, publications for donors; comprehensive training for development personnel

**C. W. Shaver & Company, Inc.**

654 Madison Avenue, Suite 2009  
New York, NY 10021  
212/753-9125

Mr. Nicholas T. Goldsborough  
*Executive Vice President/Mid-Atlantic Division*

A fund-raising and management counseling firm serving not-for-profit and public sector organizations nationwide, especially educational, cultural, health and religious institutions.

**Staley/Robeson/Ryan/St. Lawrence, Inc.**

388 Westchester Ave.  
Port Chester, NY 10573  
914/839-3167

Mr. Frank H. Robeson  
*President*

Counseling and direction for capital and annual fund campaigns, feasibility studies and other fund-raising services for schools, colleges and other organizations. Many Catholic clients.

## **E** PROGRAM COUNSELING

**Adams Associates**

Box 798  
Devon, PA 19333  
215/687-5600

Mr. Francis T. Adams, Jr.  
*President*

Twenty-five years' experience in institutional communications and marketing services. Unique feature is inhouse capability to produce total graphic programs, slide and video productions.

**John B. Cummings Co. Inc.**

22 East 72nd St.  
New York, NY 10021  
212/988-8162

Mr. John B. Cummings  
*President*

Capital campaigns, annual appeals, endowment enhancement. Specialize: advance gifts, corporate/foundation grants, deferred giving.

**Development Dynamics Group, Inc.**

8204 Exchange Way  
St. Louis, MO 63144  
314/968-8200

Mr. William D. Jenkins  
*Executive Vice President/Development*

General development counsel; direct mail fund raising counsel, creative and production services (concept through mailing); data processing/database packages with specialty in development software.

**Fazio International, Ltd.**

1230 Seventeenth St., NW  
Washington, DC 20036  
202/293-0860

Mr. Charles R. Fazio  
*President*

Provider of a full range of fund-raising, public relations, constituency development, and executive placement consultation services to educational institutions and other nonprofits.

**Garofolo, Cortiss & Kaplan**

326 W. Lancaster Ave.  
Ardmore, PA 19003  
215/896-5080

Mr. Frank A. Garofolo  
*President*

An executive search firm that developed a practice in the "not for profit" sector with a proficiency in the recruitment and selection of key development personnel.

**Ray Heckendorn & Associates**

P.O. Box 10408  
St. Louis, MO 63145  
314/725-4180

Mr. Ray Heckendorn  
*President*

Fund raising counsel, annual giving, planned giving, capital campaigns, computer software for planned giving, seminars, CRFE and NAHD Fellow.

**Edward Howard & Company**

1021 Euclid Avenue  
Cleveland, OH 44115  
216/781-2400

Mr. James G. Lubetkin  
*Senior Account Executive*

For 60 years have provided public relations and public affairs counsel, including secondary and higher education programs in support of admissions, fund raising and enhanced recognition.

**The Ingersoll Group, Inc.**

6460 E. Yale, CD-157  
 Denver, CO 80222  
 303/694-3930

Ronald J. Ingersoll, Ph.D.  
*President*

A college admissions consulting firm that specializes in marketing research, communications and publications programs, admissions training programs, alumni recruitment programs, and market studies for institutions of higher education.

**Jennings, Hood & Associates**

7814 Carousel Lane, Suite 306  
 Richmond, VA 23229  
 804/270-4335

Mr. Harry H. Jennings  
*Partner*

Development counseling services to institutions in the southeast. Board building; long-range planning; development program audits; fund-raising surveys; annual, capital, endowment, and deferred giving; P.R.; and student recruitment programs.

**Carney, Sandoe & Associates**

136 Boylston Street  
 Boston, MA 02116  
 617/542-0260

Ms. Nancy K. Sandoe  
*Advancement Placement Officer*

An educational consulting firm working with independent schools throughout the U.S. and overseas in many areas, among which are development, public relations, and alumni affairs.

**Paul Stafford Associates, Ltd.**

888 17th St., NW, Suite 201  
 Washington, DC 20006  
 202/331-0090

Mr. Robert A. Sellery, Jr.  
*Vice President and Manager*

Executive search consultants.

**Jewell Vroonland & Associates**

4902 Roland Avenue  
 Baltimore, MD 21210  
 301/467-5895

Mr. Jewell L. Vroonland  
*President*

General marketing and operations assistance, including computer programming/systems work. Direct mail campaigns, from planning through letter production/mail-shop. Publications design and writing.



## RESOURCE III

# *Financial Information About Donors*

### **A** OBTAINING PUBLICLY-AVAILABLE INFORMATION

A great deal of financial information about individuals, as well as corporations and foundations, is available through publicly-available documents. The following reviews the primary sources of *publicly-available financial information* about individual prospective donors and how to obtain it.

#### **1. Examining Stock Proxies**

Stock holdings of an officer or a director of a corporation which is registered with the Securities and Exchange Commission are a matter of public record and are listed in the annual proxy statement sent to stockholders.

Frequently the individual's salary and other remunerations are also listed, as well as his or her directorships in other corporations. (Some, like the General Electric Company, also list a director's trusteeship of educational institutions and of other non-profit organizations.)

Corporations required to register with SEC are those with 500 or more shareholders and at least \$1,000,000 in assets, or a corporation listed on one of the fourteen stock exchanges: American, Boston, Chicago Board of Trade, Cincinnati, Detroit, Midwest (Chicago), National (New York), New York, Philadelphia-Baltimore-Washington (Philadelphia), Pacific Coast (Los Angeles-San Francisco), Pittsburgh, Salt Lake City, San Francisco Mining, Spokane.

If you desire information about the holdings of a particular person who is an officer or a director in a corporation meeting the criteria above and your institution does not hold stock in that particular company, you might wish to confer with the broker handling your institution's stock investment account, or with an official of the bank with which your institution's funds are deposited. These officials usually can obtain for you copies of proxies, either

from their own files or from their correspondent offices or banks in major cities.

You can also inspect a copy of the proxy statement of companies meeting the above criteria by visiting the public reference library of the Securities and Exchange Commission's Washington, New York, or Chicago offices. A file is maintained on each company, with copies of recent proxy statements, annual reports, prospectuses relating to new stock offerings, and other materials filed with SEC. A coin-operated copying machine is available at these offices.

In addition, each regional office of the SEC has available for public inspection proxy statements and other materials for corporations meeting the above criteria and having their principal office in the region. A list of the regional offices appears at the end of this section.

At the Public Reference Room of the Securities and Exchange Commission in Chicago, located in the Everett McKinley Dirksen Federal Building at 219 South Dearborn, Room 1242, the following information about publicly held corporations is available on microfiche for public inspections: Stock registration forms, proxy statements, prospectus, Annual Report (if published) and forms 10-K, 10-Q and 8-K. Facilities are available for the user to make photocopies of desired information, cost is \$.15 per page.

You may also write to the SEC in Washington and request photostatic copies of a proxy statement. (Such requests should be addressed to the Washington office only, and not any of the regional offices.) Request for copies should be addressed to:

**Securities and Exchange Commission**  
450 5th Street, NW  
Washington, D.C. 20001  
ATTN: Public References  
Telephone: 202/655-4000

The charge for copies is at the rate of \$ 10 a page, with a minimum charge of \$5.00 per order.

For information on the stock holdings of the largest stockholder of a company who is neither an officer nor a director, write:

**Securities and Exchange Commission**  
Publications Division  
Washington, D.C. 20549

There is a charge for this service.

## 2. Government Publications

You may find an examination of the following helpful—can be ordered from the Superintendent of Documents, Government Printing Office, Washington, D.C. 20402.

### *Official Summary of Security Transactions and Holdings*

A monthly survey of security transactions and holdings reported under the provision of the Security Exchange Act of 1934, the Public Utility Holding Company Act of 1935, and the Investment Company Act of 1940 by an officer, director, beneficial owner of more than 10 per cent of any registered equity security of any class of outstanding securities of the issuer, voting trustee, trustee, member of committee or member of advisory board, investment adviser, or affiliated person of investment adviser of a company registered with SEC. Individuals or institutions under any one of these classifications are listed alphabetically, by company, with the date of the transaction, the character of transaction (bought, sold, bequest, or inheritance, compensation, distribution, exchange or conversion exercise of rights, gift, inconsistent report, redeemed, stock dividend, transferred or accrued, report subject to further review, exercise of option, stock split), the number of shares involved, and the month-end holdings of the individual in the particular stock.

### *SEC News Digest*

Summarizes each stock offering or other financing proposal for which a Securities Act registration is filed. Frequently reports the number of shares of stock held by the principal officers of the Company, or the percent of the total equity held by an officer.

## 3. The Tax Stamps on the Transfer of Real Estate

The amount of tax, as indicated by the stamps, will indicate the selling price less any mortgage. These records are available in the county recorder's office. (Sidwell Company, 28 W. 240 North Avenue, West Chicago, Illinois 60185 publishes property tax maps for selected counties in Northern Illinois, Michigan, Indiana. Such maps in-

dicating the permanent tax index number for real estate, which is used to ascertain property ownership through the records in the county clerk's office. Customer service telephone number: 312/231-8200.)

## 4. City and County Plat Books

Many of these plat books identify owners of large parcels of land. City plat books can normally be obtained through your bank or realtor; county plat books may be obtained through these or from the local farm bureau office. The official records may also be examined at the county clerk's office. (Rockford Map Publishers, 4525 Forest View Avenue, Rockford, Illinois 61108 publishes plat books for sixteen states, primarily in the Midwest.)

## 5. Accounting of an Estate Which Has Been Probated

If you know that a particular prospect has received an inheritance, you may wish to read the will of the deceased and also the accounting of the estate. It is important to note whether your prospect has control of the funds. The funds may be left in trust, and the trust beneficiary may or may not have the power to use the trust for charitable gifts, or to direct the ultimate disposition of the trust assets. *Wills of estates admitted to probate* may be examined at the office of the clerk of the probate court of the county in which the deceased had his or her legal residence, and are a matter of public record.

## 6. Business Reference Materials

Several business publications contain useful information about individuals, including Dun and Bradstreet Directories, Fortune 500 Directory, Moody's Industrial, Utility, Transportation and Bank and Finance Manuals, Standard & Poor's Register of Corporations, Directors and Executives, Dun's Reference Book of Corporate Managements and the Forbes Magazine issue covering the nation's 400 wealthiest individuals (published annually in the early fall).

# **B** SECURITIES AND EXCHANGE COMMISSION OFFICE

## 1. Headquarters

450 5th Street, NW, Washington, D.C. 20001

## 2. Regional Offices

ATLANTA, Georgia, Suite 788, 1375 Peachtree Street, N.E., 30309

BOSTON, Massachusetts, 150 Causeway Street, 02114

CHICAGO, Illinois, Room 1204, Federal Office Building, 219 South Dearborn Street, 60604

DENVER, Colorado, Suite 700, 410 17th Street, 80202

FORT WORTH, Texas, 8th Floor, 411 West 7th Street, 76102

LOS ANGELES, California, Suite 500 East, 5757 Wilshire Boulevard, 90036-3648

NEW YORK, New York, Room 1102, 26 Federal Plaza, 10278

SEATTLE, Washington, 3040 Federal Building, 915 Second Avenue, 98174

WASHINGTON, D.C., Balston Center Tower, 4015 Wilson Boulevard, Arlington, Virginia 22203

## 3. Branch Offices

DETROIT, Michigan, 231 Lafayette Street, 1044 Federal Building, 48226

HOUSTON, Texas, Suite 302, Scanlan Building, 405 Main Street, 77002

MIAMI, Florida, Suite 1114, Dupont Plaza Center, 300 Biscayne Boulevard Way, 33131

PHILADELPHIA, Pennsylvania, Room 2204, Federal Building, 600 Arch Street, 19106

SALT LAKE CITY, Utah, 810 Boston Building, 9 Exchange Place, 84111

SAN FRANCISCO, California, Box 36042, 450 Golden Gate Avenue, 94102

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# RESOURCE IV

## *Reference List of Books for Purchase*

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*From time to time development officers attempt to select some books for purchase. They intend to begin a collection which can be kept within the office and used by the development team. Resource IV presents a list of suggestions for such purchases*

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### **A** BIOGRAPHICAL

*Who's Who in America—42nd Edition; Who's Who in the East, Midwest, South, Southwest and West; Who's Who in Finance and Industry; Who's Who in American Women*

Marquis Who's Who, Inc, 200 East Ohio Street, Chicago, IL 60611

(Order through your institution's librarian)

*Directory of American Scholars—8th Edition*

Volume I—History; Volume II—English, Speech & Drama; Volume III—Foreign Languages, Linguistics & Philosophy; and Volume IV—Philosophy, Religion & Law

More than 33,500 scholars in the U.S. and Canada

R. R. Bowker Company, Order Department, P.O. Box 1807, Ann Arbor, MI 48106

### **B** FINANCIAL INFORMATION

*Official Summary*

Securities Exchange Commission, monthly summary of stock transactions of officers and directors, publicly held corporations

U.S. Government Printing Office, Washington D.C. 20402

*Stock Proxies*

For corporations registered with the Securities Exchange Commission. These show the stock holdings and frequently compensation of corporate officers and directors

Available through your broker or bank for non-stockholders.

### **C** CORPORATIONS

*The CFAE Case Book*

Twelfth Edition—Fall, 1982, Aid-to-Education Programs of 196 Leading Business Concerns.

Council for Financial Aid to Education, 680 Fifth Avenue, New York, NY 10019

*Chamber of Commerce Business Directory State Merchants and Manufacturers Association Register*

Annual Reports, Company Magazines and Newsletters, and College Graduate Recruitment Publications of Selected Corporations

***The Community and the Bank***

Bank of America Editorial Services #3631, P.O. Box 37000, San Francisco, CA 94137

***Corporate Foundation Profiles***

Detailed analyses of 230 of the largest U.S. company-sponsored foundations, including those listed in The Foundation Center's *Source Book Profiles*

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

***1984 Corporate Report Fact Book***

9th District  
Fact Book Supplement  
10th District

Dorn Publishing Co., 7831 E. Bush Lake Road, Minneapolis, MN 55435

**1. Corporate Directories**

A selection from the following, as appropriate to the nature and emphasis of the development program:

***1984 Directory of Corporate Affiliations***

"Who Owns Whom"—published annually with five updating supplements and Geographical Index.

National Register Publishing Co., Inc., 5201 Old Orchard Road, Skokie, IL 60076

***Dun and Bradstreet: Million Dollar Directory I***

47,000 firms net worth over \$1.6 million indexed alphabetically, geographically, by product class, and by top management.

Dun's Marketing Services, Three Century Drive, Parsippany, NJ 07054

***Dun and Bradstreet: Million Dollar Directory II***

37,000 firms net worth \$1-\$1.6 million indexed alphabetically, geographically, and by product class.

Dun's Marketing Services, Three Century Drive, Parsippany, NJ 07054

***Dun and Bradstreet: Million Dollar Directory III***

37,000 firms net worth \$500,000 to \$1,000,000—30,000 listed are privately held. Format consistent with that of Directories I and II.

Dun's Marketing Services, Three Century Drive, Parsippany, NJ 07054

***FORTUNE 500 Directory—1982, Largest Industrial Corporations***

Reprint from annual survey published in May and June issues.

FORTUNE, Circulation Department, 541 N. Fairbanks Court, Chicago, IL 60611

***1985 International Directory of Corporate Affiliations***

"Who Owns Whom Worldwide"—published annually.

National Register Publishing Co., Inc., 5201 Old Orchard Road, Skokie, IL 60076

***A Guide to SEC Corporate Filings: What They Are, What They Tell You***

Pertinent facts about public companies that trade their securities on the New York Stock Exchange, American Stock Exchange or Over-the-Counter.

Disclosure, Inc., 5161 River Road, Washington, D.C. 20016

***Kansas Oil Production Maps***

Kansas Blue Print, Inc., 1650 South Broadway, Wichita, KS 67211

***1985 Keystone Coal Industry Manual***

Reference manual for coal production, sales, purchasing, transportation and utilization.

Keystone Coal Industry Manual, McGraw-Hill, Inc., 1221 Ave. of the Americas, New York, NY 10020

***Matching Gift Details***

One folder for colleges, another for preparatory schools.

CASE, Publications Order Dept., Box 298, Alexandria, VA 22314

***Moody's Industrial Manual***

Gives brief history and lists principal plants, officers, and directors of principal business firms.

Moody's Investment Service, 99 Church Street, New York, NY 10007

***Moody's Public Utility Manual; Transportation Manual; Bank and Finance Manual—2 Vols.***

Moody's Investment Service, 99 Church Street, New York, NY 10007

***1985 National Directory of Address and Telephone Numbers***

Lists telephone numbers and addresses for 150,000 corporations, associations, government agencies and other entities nationwide.

National Directory of Addresses & Telephone Numbers. Whitney Communications Corp. Bldg., 14 Park Road, Tinton Falls, NJ 07724

***National Directory of Corporate Public Affairs***

New directory provides facts on Corporate Public Affairs Personnel. Covers the people responsible for a corporation's informational, political and philanthropic activities.

More than 1,000 corporations and 6,000 individuals are listed.

Columbia Books, Inc., Room 236-F, 777 14th St., N.W., Washington, DC 20005

**Poor's Register of Corporations, Directors and Executives**

Lists 37,300 corporations, including product, plants, officers and directors, and accounting firms; cross-indexed by individual officers and directors, indicates college attended and lists other business directorships as well as philanthropic trusteeships.

Standard & Poor's Corp., 25 Broadway, New York, NY 10004

**Walker's Manual of Western Corporations—1986, 77th Edition**

Published annually in 2 volumes. Data on corporations west of the Rockies, helpful to Western institutions.

Complete service per year includes manual and monthly supplements which gives descriptions of new companies, most current revenues and earnings for companies listed in manual and monthly schedule of annual stockholder meetings.

Walker's Manual, Inc., 14032 Lake St., Suite 101, Garden Grove, CA 92643

## D FOUNDATIONS

**The Foundation Directory 10th Edition**

Lists approximately 4,000 foundations alphabetically, by state, all U.S. charitable foundations with assets of \$1,000,000 or over, or which make annual grants totaling \$100,000 or more.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**Foundations Fundamentals: A Guide for Grant Seekers**

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**The Foundation Center Source Book Profiles**

Analysis of the 1,000 largest foundations, listed alphabetically and cross-referenced by subject, type of support, geographical location and focus of giving. Issued in quarterly installments.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**National Data Book—10th Edition, 2 Volumes**

Volume I contains an alphabetical listing; Volume II is a state listing in descending asset rank, listing of 22,000 private foundations showing financial data based largely on 1980-81 Internal Revenue Service information.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**The Foundation News**

Issued Bi-monthly. Initial subscription is free. Each subsequent subscription is \$18 a year for members and \$24 a year for non-members.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**Foundation Grants Index Bi-Monthly**

Description of recent grants. Formerly published in *Foundation News*.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**Foundation Grants Annual—14th Edition**

Annual cumulation of the grant information and indices appearing in *Foundation Grants Index Bi-Monthly*. Lists over 27,000 grants of \$5,000 or more.

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**Comsearch Printouts**

Listings from The Foundation Center's grants data base. Printouts available by broad topics, subject and geographic. Also available in microfiche

The Foundation Center, 888 Seventh Avenue, New York, NY 10106

**The Foundation 500—Eighth Edition**

Top 500 Foundations, subject areas they give to, states they give in. Published every 3 years

Foundation Research Service, 39 E. 51st Street, New York, NY 10022

**Taft Corporate Information System**

Includes *Taft Corporate Directory* and one year subscription to *Corporate Giving Watch*, corporate updates.

Taft Corporation, 5125 McArthur Blvd. N.W., Washington, D.C. 20007

**Trustees of Wealth**

Taft Corporation, 5125 McArthur Blvd. N.W., Washington, D.C. 20007

**Taft Foundation Reporter**

Taft Corporation, 5125 McArthur Blvd. N.W., Washington, D.C. 20007

***Cumulative list of Organizations Described in Section 170(c) of The Internal Revenue Code of 1954***

U.S. Treasury Department Publication No. 78—issued on subscription basis. Verifies the existence of a foundation, as well as other eleemosynary institutions; must subscribe to receive bi-monthly update supplements.

U.S. Government Printing Office, Washington, D.C. 20401

***Annual Register of Grant Support—1981-82 Edition***

Grant programs of selected foundations, as well as of business and professional organizations.

Marquis Who's Who, Inc., 200 E. Ohio Street, Chicago, IL 60611

***Annual Reports of Leading Foundations such as: Ford, Carnegie, Rockefeller, Kellogg, Kresge, Robert Wood Johnson, etc.***

***Christian Philanthropy; Giver and Gatherer***

Commission on Stewardship, National Council of Churches, 475 Riverside Dr., Rm. 830 New York, NY 10027

***Foundation Guide for Religious Grant Seekers***

Scholars Press, P.O. Box 5207, Missoula, MT 59806

**I. Directories of Foundations Compiled by States:**

**ALABAMA**

***Alabama Foundation Directory***

Reference Department, Birmingham Public Library, 2020 Park Place, Birmingham, AL 35203

**ARKANSAS**

***Guide to Arkansas Funding Sources—1983***

ICC, Inc., Box 141, Hampton, AR 71744

**CALIFORNIA**

***Guide to California Foundations—1981, Fourth Edition***

Northern California Grantmakers, 334 Kearny St., 2nd Floor, San Francisco, CA 94108

**ILLINOIS**

***Illinois Foundation Profile—October, 1982***

Donors Forum of Chicago, 208 S. LaSalle St., Suite 60, Chicago, IL 60604

**INDIANA**

***Indiana Foundation Directory***

Central Research Systems, Inc., 320 N. Meridian, Suite 1011, Indianapolis, IN 46201

**KANSAS**

***Directory of Kansas Foundations***

The Association of Community Arts Council of Kansas, 333 N. Penn, P.O. Box 62, Oberlin, KS 67749

**MASSACHUSETTS**

***Directory of the Larger Massachusetts Charitable Trusts and Foundations Which Grant Scholarships, Make Loans for Tuition, Grant Fellowships, or Award Other Assistance to Meet Student Educational Costs***

The Commonwealth of Massachusetts, Department of the Attorney General, Boston, MA 02100

***Broad Purpose Charitable Foundations Established Since the Publication of the "Directory of Foundations in Massachusetts," or Established Prior Thereto but not listed in the Directory***

The Commonwealth of Massachusetts, Department of the Attorney General, Boston, MA 02100

***A Directory of Foundations in the Commonwealth of Massachusetts—2nd Edition by John Parker Huber***

Eastern Connecticut State College Foundation, Inc., P.O. Box 431, Willimantic, CT 06226

**MICHIGAN**

***Michigan Foundation Directory—1981-82 Edition IV***

Michigan League for Human Services, 200 Mill Street, Lansing, MI 48933

**NEW HAMPSHIRE**

***Directory of Charitable Funds in New Hampshire—1976 with June 1983 Supplement***

Office of the Attorney General, Charitable Trust Division, Concord, NH 03301

**NEW YORK**

***New York Foundation Profiles by James H. Taylor***

Davis-Taylor Associates, Inc., 804 Main St., Williamsburg, KY 40769

**OHIO**

***The 1982 Charitable Foundations Directory of Ohio***

Charitable Foundations Directory, Attorney General's Office, 30 E. Broad Street, Columbus, OH 43215

***Ohio Foundations Profiles by James H. Taylor***

Davis-Taylor Associates, Inc., 804 Main St., Williamsburg, KY 40769

**OKLAHOMA**

***Directory of Oklahoma Foundations by Thomas E. Broce***

University of Oklahoma Press, 1005 Asp Avenue, Norman, OK 73069

## OREGON

**Directory of Foundations and Charitable Trusts Registered in Oregon by Virgil D. Mills—1983 Edition**

Department of Justice, Charitable Trust Section, 500 Pacific Building, Portland, OR 97201

**The Guide to Oregon Foundations—2nd Edition, April 1983**

Tri-County Community Council, 718 W. Burnside Street, Portland, OR 97209

## PENNSYLVANIA

**Directory of Pennsylvania Foundations—2nd Edition, 1981**

Friends of the Free Library, Logan Square, Philadelphia, PA 19103

## WASHINGTON

**Charitable Trust Directory**

Office of the Attorney General, Temple of Justice, Olympic, WA 98504

## WISCONSIN

**Foundations in Wisconsin: A Directory**

Published Biennially.

Marquette University Memorial Library, 1415 West Wisconsin Ave., Milwaukee, WI 53233

# E

## GOVERNMENT

**Higher Education and National Affairs**

A newsletter—approximately 40 times a year.

American Council on Education, One Dupont Circle, Washington, D.C. 20036

**Catalog of Federal Domestic Assistance****National Science Foundations: Annual Report—1979**

From U.S. Government Printing Office, Washington, D.C. 20402

**The Guide to Federal Assistance**

Wellborn Associates, Inc., 5791 Beaumont Avenue, La Jolla, CA 92037

**The Grantsmanship Center News**

Bi-Monthly.

The Grantsmanship Center, 1031 South Grand Avenue, Los Angeles, CA 90015

# F

## TAX DATA

**Taxwise Giving**

12 Issues.

Taxwise Giving, 13 Arcadia Road, Old Greenwich, CT 06870

**Deferred Giving-Explanation**

Specimen Agreements, Forms.

Taxwise Giving, 13 Arcadia Road, Old Greenwich, CT 06870

**Charitable Lead Trust**

Latest Internal Revenue Code Changes, Published Revenue Ruling and Treasury Regulations. Latest IRS Private Letter Rulings on Charitable Lead Trusts.

Taxwise Giving, 13 Arcadia Road, Old Greenwich, CT 06870

**J. K. Lasser's Roundup of Tax News**

Simon & Schuster, Simon & Schuster Building, 1230 Avenue of the Americas, New York, NY 10020

**J. K. Lasser's Monthly Tax Service**

With "your income tax"; Without "your income tax".

Simon & Schuster, Simon & Schuster Building, 1230 Avenue of the Americas, New York NY 10020

**Handbook on the Economic Recovery Tax Act of 1981**

Prentice-Hall, Inc., 222 W. Adams, Chicago, IL 60606

**Tax Economics of Charitable Giving. 1984 Edition.**

Arthur Andersen & Co., 69 W. Washington St Chicago, IL 60602

**Tax Considerations in Charitable Giving. 1984 Edition.**

Arthur Andersen & Co., 69 W Washington St , Chicago, IL 60602

**Estate and Gift Tax Changes Under 1981 Tax Law**

Commerce Clearing House, Inc., 180 North LaSalle Street, Chicago, IL 60601

**Explanation of Economic Recovery Tax Act of 1981**

Commerce Clearing House, Inc., 180 North LaSalle Street, Chicago, IL 60601

**Economic Recovery Tax Act of 1981 Law and Explanation**

Commerce Clearing House, Inc., 180 North LaSalle Street, Chicago, IL 60601



# G PUBLICITY

## *Editor and Publisher Yearbook*

Editor & Publisher Co., 303 E. Ohio St., Chicago, IL 60611

## *Broadcasting Yearbook*

Radio and TV stations;

Broadcasting Yearbook, 1735 DeSales St., N.W., Washington, D.C. 20036

## *Gebbie Press All-In-One Directory*

Daily Newspapers, Weekly Newspapers, TV and Radio Stations, General Magazines, Business Papers, Black Press, Trade Press, Farm Publications, News Syndicates.

Gebbie, Box 1000, New Paltz, NY 12561

## *Working Press of the Nation—5 Volumes*

### *Volume 1: The Newspaper Directory*

Daily newspapers in U.S. and Canada . . . as well as 3,500 weekly special interest and foreign language newspapers.

### *Volume 2: The Magazine Directory*

More than 3,500 consumer, trade and professional magazines.

### *Volume 3: The Radio and TV Directory*

Detailed information on 6,900 radio programs and 2,100 TV shows.

### *Volume 4: Feature Writers, Photographers & Syndicates*

A complete guide to free-lance writers and photographers.

### *Volume 5: Internal Publications*

Comprehensive information on 3,300 companies, government associations, clubs and miscellaneous house organs.

National Research Bureau, Inc., 424 N Third Street, Burlington, IA 52601

## *Media Resource Guide*

Foundation for American Communications, 3383 Barham Boulevard, Los Angeles, CA 90068

# H DIRECTORIES

*Telephone Directories* for major cities, your area, plus selected cities such as Manhattan, Washington, Chicago

*Social Registers, Club Directories, Service Organization Directories*

*City Directories* in areas of concentration of constituencies. Lists residents both alphabetically and by street index.

R. L. Polk & Co., 431 West Howard, Detroit, MI 48231

**NOTE:** For some cities, a separate listing of telephone subscribers by street index is available through the telephone company; in most cases, requests for such a "reverse directory" are made through the local telephone company business office.

## *"Criss-Cross" Directories*

Haines & Company, 817 Morse Avenue, Schaumburg, IL 60193

## *Martindale-Hubbell Law Directory—7 Volumes*

Revised and published annually—provides "Complete Directory Service" for and about the legal profession.

Martindale-Hubbell, Inc., P.O. Box 1001, Summit, NJ 07901

*Directory of Bank Officials* in your state (usually available in back issues from your local bank)

## *Directory of Physicians*

## *Security Dealers of North America*

Lists of Offices of Dealers and Brokers—2 volumes per year.

Standard and Poor's Corp., 25 Broadway, New York, NY 10004

For church-related instructions, *annual report or directory of the denomination.*

## *The Official Catholic Directory*

P. J. Kennedy & Sons, 866 Third Avenue, New York, NY 10022

## *Handbook for Development Officers of Independent Schools*

CASE, Publications Order Dept., Box 298, Alexandria, VA 22314

## *Education Directory, Colleges and Universities*

U.S. Government Printing Office, Washington, D.C. 20402

**Education Directory: Education Associations 1982-1983—Supplement**

U.S. Government Printing Office, Washington, D C 20402

**Demographic Surveys of Your Area**

Chamber of Commerce, Local Bank, Local Public Utility, Local Railroad

**Bluebook of Your State**

Secretary of State

**Newsbriefs—Monthly**

A compendium of brief articles on foundations and government programs and other developments on the philanthropic front which pertain to educational institutions, health care institutions, churches, social welfare agencies and other nonprofit organizations.

Lutheran Resources Commission-Washington, Dupont Circle Building, Suite 823, 1346 Connecticut Ave., N.W., Washington, D.C. 20036

**Wall Street Journal**

Wall Street Journal, 200 Burnett Road, Chicopee, MA 01021

**Liberal Education**

Association of American Colleges, 1818 R. Street N.W., Washington, D C. 20009

**The Chronicle of Higher Education—48 Issues**

The Chronicle of Higher Education, 1333 New Hampshire Ave. N.W., Washington, D C. 20036

**2. Professional Publications****Council for Advancement and Support of Education—CASE**

CASE, Publications Order Dept., Box 298, Alexandria, VA 22314

**Gonser Gerber Tinker Stubr—Bulletin**

105 W. Madison Street, Chicago, IL 60602

**National Association for Hospital Development**

8300 Greensboro Dr., Suite 1110, McLean, VA 22102

**American Society for Hospital Public Relations—Directors**

840 N. Lake Shore Drive, Chicago, IL 60611

**National Society of Fund Raising Executives**

1511 K. Street, N.W., Suite 831, Washington, D.C. 20005

**National Association of Independent Schools (NAIS)**

18 Tremont Street, Boston, MA 02108

**National Catholic Educational Association (NCEA)**

Publication Sales Department  
1077 30th St NW Suite 100  
Washington, DC 20007-3852

**3. Newspapers**

Newspaper of the local community as well as one(s) from the nearly largest urban centers

**I SUBSCRIPTIONS****1. Business Publications****Fortune—Bi-monthly**

Time, Inc., 541 N. Fairbanks Ct., Chicago, IL 60611

**Business Week**

Business Week, 1221 Avenue of the Americas, New York, NY 10020

**Forbes**

Forbes Magazine, 60 Fifth Avenue, New York, NY 10011

## RESOURCE V

# *Special Services of Development Office/NCEA*

The Development Office of the National Catholic Educational Association was established as a distinct office in 1982. Prior to this development services were supplied to members through their constitutive department. The Development Office works very closely with constitutive departments, their executive committees and members to provide various development services needed by members. While leading development activity for the Association, the office also devotes much time and energy to the educational aspects of development for Association members.

Specifically the Development Office:

- publishes a series of "how to" books on development including the following titles:

**Understanding & Implementing Development** by Richard J. Burke. Development is much more than fundraising. It includes understanding, commitment, involvement, planning, a statement of the case and funding. The booklet presents practical suggestions which are now succeeding in Catholic institutions. 34 pp.

**Public Relations** by Cathy Campbell, SP. Planning and execution of a successful public relations program are essential to the success of Catholic institutions. Detailed steps are provided in this booklet, along with methods for use with all types of media and with all sizes of audience. 39 pp.

**Annual Fund—Estate Planning**, by Robert L. Stuhr and Jerry A. Jarc. This comprehensive "how-to" book is filled with practical suggestions helpful in two major development areas. The Annual Fund Drive and the Establishment of an Estate Planning Program can succeed by following the steps outlined. 22 pp.

**The Case Statement** by Robert J. Yeager. The second book in the "how to" series on development issues, details the use of institutional philosophy, mission, long-range plans, programs, effects on the broader community and resources as the basis of a dynamic Case Statement. Includes two outlines for writing a Case Statement and a sample of a successful statement. 26 pp.

**Development in Total Catholic Education**, a theme issue of *Momentum*. Experts discuss the concepts, the components, and the practical how-to's of development.

**Elementary School Finance Manual**. This volume treats key financial areas that are the responsibility of the Catholic elementary school. Daily Financial Operations; The Annual Budget; Tuition; Long-Range Planning, Fundraising; and Steps Toward Development. It offers many examples of ready-to-use forms. 126 pp.

- organizes and facilitates an annual symposium on development issues in conjunction with the Annual Convention, Exposition and Religious Education Congress. Recent symposia have had 60-65 individual sessions on all areas of development.
- publishes PASTORS DEVELOPMENT NEWSLETTER which is sent to all U.S. pastors introducing them to the use of development in the parish and with parish related programs especially religious education
- promotes the use of the Christian Brothers Investment Services, Inc. as a method to enhance return on current cash flow through an institution.
- serves as staff to the National Council for Catholic Education, (NCCE). The Council is an integral volunteer part of the National Catholic Educational Association whose objectives are:

1. to provide counsel to the President of the NCEA on the status of Catholic education on the national level;
2. to advise on the future directions and improvement of Catholic education;
3. to present recommendations for dealing with problems confronting Catholic education;
4. to assist in identifying prospective candidates and resources for service to Catholic education; and
5. to participate in the financial support of NCEA

Membership in the Council is by invitation from the NCEA President. The Council is influential in accelerating the spread of development throughout the U.S.

Members of the Development Office staff as well as departmental executive directors of constitutive departments take part in regional workshops and seminars which promote development. Special efforts will be mounted in 1986-87 to encourage and enable additional development activities on the part of elementary schools. Strong emphasis is placed on providing aid to elementary and secondary schools which serve large numbers of students from low-income families.

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# RESOURCE VI

## *Information Centers*

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### **A** RESEARCHING PRIVATE FOUNDATIONS

The purpose of this section is to suggest procedures to obtain information concerning giving patterns and other particulars about certain private foundations.

Careful reading of the Foundation Directory issued by The Foundation Center, 888 7th Avenue, New York, New York 10106 will show very specific aims and purposes of many foundations, plus policies which eliminate many institutions.

This book contains entries for approximately 3,363 foundations, i.e., all those having assets of \$1,000,000 or more or with annual giving of \$100,000 or more. Entries are based mainly on 1979 fiscal dates.

All private foundations are required to file an information return annually with the Internal Revenue Service listing gross income, receipts and disbursements. This information is submitted on Form 990AR and Form 990PF. These returns must be filed by a foundation on or before the 15th day of the fifth month following the close of the Foundation's annual accounting period.

All foundations file the returns with the Mid-Atlantic Service Center, Internal Revenue Service, Philadelphia, Pennsylvania. Here is how you can obtain, for inspection, a copy of a foundation return:

1. If your institution is near one of the 58 cities where there is a district director, Internal Revenue Service, you may write your local district director expressing your desire to examine the Form 990AR and 990PF return of a specific foundation. You must name the foundation by its full title, provide its address, and state the year of the return desired. The district director will then obtain the return for you and notify you when it is available. You can then visit the district director's office and hand copy the information desired. There is no cost involved.

2. Another method is to make your request in writing to the Mid-Atlantic Service Center and route a copy of your request letter to your local district director, IRS. The Center will then send a copy of the return to the local district director's office, which in turn will inform you when the return has been received. As in (1), the return may only be inspected. Notations must be made by hand. You may, however, purchase the photostat at \$1.00 a page.

3. It is also possible to secure directly from the Mid-Atlantic Service Center, IRS photostatic copies of the public information section of a foundation's Form 990AR and 990PF return. The charge is \$1.00 for the first page and \$ 10 for each additional page of your total order. If the number of pages is fewer than ten, the Center will send the copies to you with a bill for the amount. If there are ten pages or more, you will be billed first and then, upon receipt of payment, the Center will send the photostats.

Requests should list the names of the foundations alphabetically, by state, and should be addressed as follows:

Mid-Atlantic Service Center  
Internal Revenue Service  
Post Office Box 187  
Cornwell Heights, Pennsylvania 19020  
Attention: Public Inspection  
DP 511

There is frequently a lengthy delay in the response. You may receive quicker service through one of the various Cooperating Collections of the Foundation Center (See #5 below and attached list of these Collections).

4. Should you wish to visit the Mid-Atlantic Service Center to examine returns, you must write giving names of the foundations (alphabetically by state) whose returns you wish to examine, and the date you should like to be at the Center. You must include your name, address, and phone number as it is the policy of the Service Center to phone you when they have scheduled your appointment.

Information from the returns may be hand-copied there, or if you have a portable tape recorder its use there is permitted.

The street address of the Office of Public Inspection of the Mid-Atlantic Service Center is:

10551 Decatur Road  
Philadelphia, Pennsylvania 19154

It should be noted that this address is different from the central office of the Mid-Atlantic Service Center, located at 11601 Roosevelt Boulevard, about one mile away. Both offices are in the extreme northeast section of Philadelphia.

5. Film copies of all foundation returns are also available for inspection, together with news clippings, new releases, books, directories, periodicals and biographical data, in the library of The Foundation Center, 888 Seventh Avenue, New York, New York 10106, telephone 212/975-1120. It also provides a national set of IRS returns for its Washington office, a regional set of cards for its field offices in Cleveland and San Francisco, and state sets of cards to over 80 cooperating regional collections in all 50 states, Canada, Mexico, Puerto Rico and the Virgin Islands. The Center, a non-profit organization incorporated in 1956 to disseminate information about foundations, obtains its copies of the private foundation returns on a monthly basis from the Mid-Atlantic Service Center, IRS. The Foundation Center is open weekdays from 10:00 a.m. to 5:00 p.m.

Some of the services and publications from The Foundation Center are:

**The Foundation Center National Data Book** (Annually in January). A list of more than 22,000 currently active foundations. Foundations are listed by state in descending order of annual grants amounts. Listings include foundation name, address, principal officer, assets, amount of grant made, and gifts received in the most recent year of record, which is specified. There is an alphabetical index to the listings.

***Foundation Fundamentals: A Guide for Grantseekers.***

This totally new edition of the paperback guide to foundations describes in detail basic techniques for doing foundation funding research, as well as the use and contents of primary foundation information tools. Background information on the foundation field, as well as guidelines for proposal preparation, are included.

***Foundation Center Source Book Profiles*** is an annual subscription service providing analytical profiles of more than 500 foundations per year; top 1,000 foundations are covered on a two-year cycle. Each profile is approximately 2-4 pages in length and includes a detailed factual breakdown of each foundation's giving by subject area, by

grant type, and by grant recipient type. In addition to the grant analysis, descriptions contain full addresses, telephone numbers when available, the names of persons to contact for grant information, and complete lists of officers and pertinent staff. A complete up-to-date fiscal analysis includes assets, gifts received, and grants awarded figures. Background information on the foundation's founding, donors, and related activities is presented, as are details on the foundation's publications and application guidelines and procedures. Updated quarterly:

***Foundation Grants to Individuals*** profiles the programs of more than 900 foundations that will make grants to individuals. While most foundations only make grants to nonprofit organizations, the foundations described in this book have made awards to students, artists, scholars, foreign individuals, minorities, musicians, scientists, and writers. It contains never before published information on foundation funds for scholarships, fellowships, internships, medical and emergency assistance, residencies, and travel agents.

The book is arranged by broad program areas and includes a detailed subject index. Entries include the foundation's address, telephone number, the name of the person to whom correspondence should be addressed, the foundation's asset size, the total amount of grants awarded, the portion of the grant total awarded to individuals, the number of individuals receiving grants, application information, and a description of that portion of the foundation's program relating to individuals

In 1975 The Foundation Center inaugurated the Associates Program for organizations and individuals needing specialized information service on private foundations. Personal service of the staff and personal response to requests for information by phone or mail are available only to those who are Associates. (All persons visiting Center libraries are assisted by staff without charge.) Toll free telephone reference service has been available to Associates since January 1977. Customized searching of the computerized data bases of The Foundation Center is now available only to Associates. However, persons needing a single computer search or limited access to computerized foundation information can now access The Foundation Center's three data bases directly via the Lockheed DIALOG commercial communication system.

Using the DIALOG system, it is possible to search the *Foundation Directory* for information on the 3300 largest foundations, including location, structure, personnel, financial data, purpose and activities

***The Foundation Grants Index*** lists grants records and more than 400 American foundations. DIALOG searches can obtain information such as name and location of foundation and recipient; size, date and number of

grants; descriptions and limitation, of grants. In both data bases, DIALOG's full text indexing allows a natural language approach to subject and name searching. The *National Data Base* contains key information on all U S foundations as extracted from foundation IRS returns.

Searching is \$60 per hour for computer connect time and \$ 30 for each complete citation printed offline.

*For further information contact:*

Lockheed Information Systems  
3251 Hanover Street (15-50/201)  
Palo Alto, California 94304  
415/493-4411, ext. 45635

The Foundation Center  
888 Seventh Avenue  
New York, New York 10019  
212/975-1120

The file of IRS forms 990AR and 990PF for all private foundations should be complete and available on aperture cards at The Foundation Center. During 1986 the Center will have received 1985 returns in monthly installments as they are processed and filmed by IRS. The cards may be used, free of charge, by visitors to any of The Foundation Center library collections. Microfilm and paper copies may be ordered only by Associates, however, requests should include full foundation name and its geographic location. It is recommended that large blocks by state should be ordered from the Internal Revenue Service.

Prices when ordered by Associates from The Foundation Center:

*Aperture Cards*—\$.90 first card of an order, \$.45 each additional card (15 microimages, one image for each page of the original return)

*Paper Copies*—\$.90 first page of an order; \$.45 each additional page.

6. Foundation Center Field offices opened late in 1977 in Cleveland and San Francisco. Each field office has a library facility with a fully developed collection on foundation funding and a supplementary collection on government and corporate funding and foundations, foundation annual reports, news releases, and often statements or materials prepared specifically by local foundations for the field office. The California office will have IRS returns for all foundations in the 11 Western states and the Ohio office will receive returns for 6 Central states.

Field Representative: Jeanne Bohlen  
Address: Kent H. Smith Library  
Foundation Center—Cleveland  
739 National City Bank Building  
629 Euclid  
Cleveland, Ohio 44114  
Telephone: 216/861-1933

Field Representative: Caroline McGilvray  
Address: Foundation Center—San Francisco  
312 Sutter Street  
San Francisco, California 94108  
Telephone: 415/397-0902

7. A regional collection of The Foundation Center is housed at The Donors' Forum of Chicago, 208 South LaSalle Street, Suite 600, Chicago, Illinois 60604.

It has a collection of current information on Midwest organizations filing as private foundations with the Internal Revenue Service.

The library is open to the public. Its hours are 9:00 a.m.-4:00 p.m. Monday through Friday. Susan Levy, Librarian. The telephone number is 312/726-4882.

8. The Foundation Center also maintains a duplicate set of all foundation returns at its Washington office, 1001 Connecticut Avenue, N.W., 20036, telephone 202/347-1400.

9. The Foundation Center also maintains over 80 regional collections in host libraries in 50 states, Canada, Mexico, Puerto Rico and the Virgin Islands. These reference collections are generally located in public, university or foundation libraries and contain copies of all of the Center's publications, as well as the aperture cards containing the filmed IRS returns for foundations in their state. An address list for these cooperating library collections found on page 38. For current information about newly designated library collections or other Center publications or services call toll-free 800/424-9836. All Center publications may be ordered via this WATS line if the purchase is to be charged to VISA or MASTER CHARGE accounts.

10. Some 480 foundations, chiefly the larger ones, publish and distribute annual reports. These reports are available for inspection at the library of The Foundation Center and at its regional libraries. You may wish to build your own library of reports of these foundations serving your geographic area or whose programs coincide with those of your institution, by writing to the executive secretary of the particular foundation.

11. IRS Form 990AR must be made available to the public at the principal office of the foundation for 180 days after publication of a notice of the report's availability according to the Tax Reform Act of 1969.

## **B** FOUNDATIONS AND DONORS INTERESTED IN CATHOLIC ACTIVITIES, INC. (FADICA)

Organized in 1976, Foundations and Donors Interested in Catholic Activities, Inc. (FADICA), is an effort among a growing number of private foundations and donors across the country and in Europe to establish contact and maintain communication with one another. In addition to facilitating the exchange of information among its members, FADICA serves as a forum for the discussion of common grant requests and programs of mutual interest. FADICA also serves as a means of coordinating joint efforts by member foundations, and helps its members keep abreast of recent developments in the Church. FADICA is not a clearinghouse for information about fund raising nor does it give grants directly.

*For further information contact:*

Dr. Francis Butler, President  
FADICA  
Suite 401  
1730 Rhode Island Avenue, N.W.  
Washington, DC 20036

## **C** FOUNDATION CENTER PUBLICATIONS

Publications of The Foundation Center are the primary working tools of every serious grantseeker. They are also used by grantmakers, scholars, journalists, regulators, and legislators: in short, by everyone seeking any type of factual information on foundation philanthropy. Copies of all publications are available for examination free of charge at any of the regional collections listed on page 38. Publications may be ordered from The Foundation Center, 888 Seventh Avenue, New York, NY 10106; please include prepayment and complete shipping address. For additional information or to place credit card orders, call toll-free 800/424-9836.

### 1. Source Book Profiles

*Source Book Profiles* is an annual subscription service offering a detailed description of the 1,000 largest foundations, analyzing giving patterns by subject area, type of support, and type of recipient. The service operates on a two-year publishing cycle, with each one-year Series cov-

ering 500 foundations. Each quarterly installment includes about 125 new profiles as well as information on changes in address, telephone, personnel, or program, and a revised, cumulative set of indexes to all 1,000 foundations covered in the two-year cycle by name, subject interest, type of grants awarded, and city and state location or concentration of giving.

### 2. National Data Book, 7th Edition

Lists the 22,000 currently active grantmaking foundations in the U.S. in one easy-to-use volume arranged by state in descending order by their annual grant totals. A separate alphabetical index to foundation names is also included. Foundation entries include name, address, and principal officer, plus full fiscal data (market value of assets, grants paid, gifts received, and fiscal period) and an indication of which foundations publish annual reports. *The National Data Book* will help you find the address of any active U.S. foundation, locate all foundations in a particular city or state, identify all foundations in a particular city or state, identify all foundations which issue annual reports, and profile foundation assets or giving levels by state or region.

### 3. Corporate Foundation Profiles, 3rd Edition

Includes comprehensive analyses of 234 of the nation's largest company-sponsored foundations, with full subject, type of support, and geographic indexes. Summary financial data is provided for 467 additional corporate foundations. Entries are drawn from *Source Book Profiles* and include address and telephone number, complete information about the parent company, financial data, an analysis of the foundation's giving program, and information regarding the foundation's policies, guidelines, and application procedures.

### 4. Foundation Grants to Individuals, 4th Edition

The only publication devoted entirely to specialized foundation grant opportunities for qualified individual applicants. The third edition provides full descriptions of the programs for individuals of about 950 foundations. Entries also include foundation addresses and telephone numbers, names of trustees and staff, financial data, and sample grants. This volume can save individuals seeking grants countless hours of research.

### 5. Foundation Grants Index Annual

Lists the grants of \$5,000 or more awarded to nonprofit organizations by about 450 major U.S. foundations. The 13th edition is the largest *Index* ever, listing over 27,000



grants and including an expanded analytical introduction. The volume is arranged alphabetically by state and foundation name. Each entry notes the amount and date of the grant, name and location of the recipient, and a brief description of the grant. Indexes to grant recipients and subject keywords and phrases, a combined subject and geographic category index, and a new combined index by type of recipient and type of support awarded are provided.

## 6. Foundation Grants Index Bimonthly

This new current awareness service for grantseekers and grantmakers provides descriptions of over 2,000 recent grants—fully indexed by subject and recipient name—in each bimonthly issue. The service also includes cumulative lists of annual reports and information brochures issued by foundations and corporate grantmakers; a calendar of events and seminars of interest to the philanthropic community; an update service listing changes in grantmakers' policy, priorities, personnel, etc.; information on new books, articles, speeches, and other publications on fundraising and philanthropy; plus special reports and grants analyses.

## 7. COMSEARCH Printouts

This popular series of computer-produced guides to foundation giving derived from The Foundation Grants Index Database is now issued in four separate categories.

**COMSEARCH: Broad Topics** indexes and analyzes recent foundation grants in 11 broad subject categories. Each listing includes all grants in the particular subject area reported to The Foundation Center during the preceding year, along with an index of foundations with addresses and notes about specific limitations on their giving program, a detailed subject index, and an index of all recipient organizations listed. **COMSEARCH: Broad Topics** includes:

- *Grants for Arts & Cultural Programs*
- *Grants for Business & Employment*
- *Grants for Children & Youth*
- *Grants for Higher Education*
- *Grants for Hospitals & Medical Care Programs*
- *Grants for Museums*
- *Grants for Science Programs*
- *Grants for Social Science Programs*
- *Grants for Women & Girls*
- *Grant for International & Foreign Programs*
- *Grants for Minorities*

**COMSEARCH: Subjects** includes 68 specially focussed subject listings of grants reported to The Foundation Center during the preceding year. Listings are arranged by the state where the foundation is located and then by

foundation name, and include complete information on the name and location of the grant recipient, the amount awarded, and the purpose of the grant. **COMSEARCH: Subjects** may be purchased as a complete set on microfiche or individually by particular subject area of interest in paper or microfiche form. A full list of categories is available on request.

**COMSEARCH: Geographic** provides customized listings of grants received by organizations in two cities, eleven states, and four regions. These listings make it easy to see which major foundations have awarded grant in your area, to which nonprofit organizations, and what each grant was intended to accomplish.

**COMSEARCH: Special Topics** includes three of the most frequently requested special listings from the Center's computer databases. The three special listings are:

- The 1,000 Largest U.S. Foundations by Assets
- The 1,000 Largest U.S. Foundations by Total Giving
- 1,300 Operating Foundations Which Administer Their Own Projects or Programs

## 8. Foundation Fundamentals: A Guide for Grantseekers

This comprehensive, easy-to-read guidebook written by Carol Kurzig presents the facts you need to understand the world of foundations and to identify foundation funding sources for your organizations. Over 45 illustrations take you step-by-step through the funding research process. Worksheets and checklists are provided to help you get started in your search for funding. Comprehensive bibliographies and detailed research examples are also supplied.

## 9. America's Voluntary Spirit: A Book of Readings

In this thoughtful collection, Brian O'Connell, President of INDEPENDENT SECTOR, brings together 45 selections which celebrate and examine the richness and variety of America's unique voluntary sector. O'Connell researched nearly 1,000 selections spanning over 300 years of writing to identify those speeches, articles, chapters, and papers which best define and characterize the role that philanthropy and voluntary action play in our society. Contributors as diverse as de Tocqueville and John D. Rockefeller, Thoreau and Max Lerner, Erma Bombeck and Vernon Jordan are unified in a common examination of this unique dimension of American life. The anthology includes a bibliography of over 500 important writings and a detailed subject index.

## THE FOUNDATION CENTER

The foundation Center has a nationwide network of reference collections for free public use which fall within four basic categories. The reference libraries operated by the Center offer the widest variety of user services and the most comprehensive collections of foundation materials, including all Center publications; books, services and periodicals on philanthropy; and foundation annual reports, newsletters and press clippings. The New York and Washington, D.C. libraries contain the IRS returns for all currently active private foundations in the U.S. The Cleveland and San Francisco field offices contain IRS records for those foundations in the midwestern and western states, respectively.

Cooperating collections contain IRS records for those foundations within their own state, and a complete col-

lection of Foundation Center publications. Local affiliate collections (★) provide a core collection of Center publications for free public use.

Some reference collections (●) are operated by foundations or area associations of foundations. They are often able to offer special materials or provide extra services, such as seminar or orientations for users, because of their close relationship to the local philanthropic community. All other collections are operated by cooperating libraries or other nonprofit agencies. Many are located within public institutions and all are open to the public during a regular schedule of hours.

Please telephone individual libraries for more information about their holdings or hours. To check on new locations call toll-free 800/424-9836 for current information.

### Where to Go for Information on Foundation Funding

#### Reference Collections Operated by The Foundation Center

The Foundation Center  
888 Seventh Avenue  
New York, New York  
10106  
212-975-1120

The Foundation Center  
1001 Connecticut Avenue,  
NW  
Washington, D.C. 20036  
202-331-1400

The Foundation Center  
Kent H. Smith Library  
739 National City Bank Bldg  
629 Euclid  
Cleveland, Ohio 44114  
216-861-1933

The Foundation Center  
312 Sutter Street  
San Francisco, Calif. 94108  
415-397-0902

#### Cooperating Collections

##### ALABAMA

Birmingham Public  
Library  
2020 Park Place  
Birmingham 35203  
205-254-2541

Auburn University at  
Montgomery Library  
Montgomery 36193  
205-279-9110

##### ALASKA

University of Alaska,  
Anchorage Library  
3211 Providence Drive  
Anchorage 99504  
907-263-1848

##### ARIZONA

Phoenix Public Library  
Social Sciences Subject  
Department  
12 East McDowell Road  
Phoenix 85004  
602-262-4782

Tucson Public Library  
Main Library  
200 South Sixth Avenue  
Tucson 85701  
602-791-4393

##### ARKANSAS

Westark Community  
College Library  
Grand Avenue at  
Waldron Rd.  
Fort Smith 72913  
501-785-4241

Little Rock Public Library  
Reference Department  
700 Louisiana Street  
Little Rock 72201  
501-370-5950

##### CALIFORNIA

• California Community  
Foundation  
Funding Information  
Center  
1151 West Sixth Street  
Los Angeles 90017  
213-413-4719

★ Riverside Public Library  
3581 7th Street  
Riverside 92501  
714-947-7201

★ California State Library  
Reference Services,  
Rm. 309  
914 Capitol Mall  
Sacramento 95814  
916-322-0369

San Diego Public Library  
820 E Street  
San Diego 92101  
619-236-5565

★ Orange County  
Community  
Development Council  
1440 East First Street,  
4th floor  
Santa Ana 92701  
714-547-6801

Santa Barbara Public  
Library  
Reference Section  
40 East Anapamu  
P.O. Box 1019  
Santa Barbara 93102  
805-962-7653

★ Central Sierra Arts  
Council  
19411 Village Drive  
Sonora 95370  
209-532-2787

★ North Coast  
Opportunities, Inc.  
101 West Church Street  
Ukiah 95482  
707-462-1954

##### COLORADO

★ Pikes Peak Library District  
20 North Cascade Avenue  
Colorado Springs, CO 80901  
303-473-2080

Denver Public Library  
Sociology Division  
1357 Broadway  
Denver 80203  
303-571-2190

##### CONNECTICUT

Hartford Public Library  
Reference Department  
500 Main Street  
Hartford 06103  
203-525-9121

★ D.A.T.A.  
81 Saltonstall Avenue  
New Haven 06513  
203-776-0797

##### DELAWARE

Hugh Morris Library  
University of Delaware  
Newark 19711  
302-738-2965

##### FLORIDA

Jacksonville Public Library  
Business, Science, and  
Industry Department  
122 North Ocean Street  
Jacksonville 32202  
904-633-3926

Miami-Dade Public Library  
Florida Collection  
One Biscayne Boulevard  
Miami 33132  
305-579-5001

★ Orlando Public Library  
10 North Rosalind  
Orlando 32801  
305-425-4694

★ Leon County Public  
Library  
Community Funding  
Resources Center  
1940 North Monroe Street  
Tallahassee 32303  
904-487-2665

★ Selby Public Library  
1001 Boulevard of the Arts  
Sarasota 33577  
813-366-7303

##### GEORGIA

Atlanta Public Library  
1 Margaret Mitchell  
Square at Forsyth and  
Carnegie Way  
Atlanta 30303  
404-688-4636

**HAWAII**

Thomas Hale Hamilton  
Library  
General Reference  
University of Hawaii  
2550 The Mall  
Honolulu 96822  
808-948-7214

- ★ Community Resource Center  
The Hawaiian Foundation  
Financial Plaza of the Pacific  
111 South King Street  
Honolulu 96813  
808-525-8548

**IDAHO**

Caldwell Public Library  
1610 Dearborn Street  
Caldwell 83605  
208-459-3242

**ILLINOIS**

- ★ Belleville Public Library  
121 E. Washington Street  
Belleville 62220  
618-234-0441
- Donors Forum of Chicago  
208 South LaSalle Street  
Chicago 60604  
312-726-4882
- ★ DuPage Township  
300 Briarcliff Road  
Bolingbrook 60439  
312-759-1317

Sangamon State University  
Library  
Shepherd Road  
Springfield 62708  
217-786-6633

**INDIANA**

- ★ Allen County Public Library  
900 Webster Street  
Fort Wayne 46802  
219-424-7241
- ★ Indiana University  
Northwest Library  
3400 Broadway  
Gary 46408  
219-980-6580

Indianapolis-Marion  
County Public Library  
40 East St. Clair Street  
Indianapolis 46204  
317-269-1733

**IOWA**

Public Library of Des  
Moines  
100 Locust Street  
Des Moines 50308  
515-283-4259

**KANSAS**

- Topeka Public Library  
Adult Services Department  
1515 West Tenth Street  
Topeka 66604  
913-233-2940
- ★ Wichita Public Library  
223 South Main  
Wichita 67202  
316-262-0611

**KENTUCKY**

- ★ The Louisville  
Foundation, Inc.  
623 West Main Street  
Louisville 40202  
502-585-4649

Louisville Free Public  
Library  
Fourth and York Streets  
Louisville 40203  
502-584-4154

**LOUISIANA**

East Baton Rouge Parish  
Library  
Centroplex Library  
120 St. Louis Street  
Baton Rouge 70802  
504-344-5291

New Orleans Public  
Library  
Business and Science  
Division  
219 Loyola Avenue  
New Orleans 70140  
504-524-7382 ext. 33

- ★ Shreve Memorial Library  
424 Texas Street  
Shreveport 71101  
318-226-5894

**MAINE**

University of Southern  
Maine  
Center for Research and  
Advanced Study  
246 Deering Avenue  
Portland 04102  
207-780-4411

**MARYLAND**

Enoch Pratt Free Library  
Social Science and History  
Department  
400 Cathedral Street  
Baltimore 21201  
301-396-5320

**MASSACHUSETTS**

- Associated Grantmakers of  
Massachusetts  
294 Washington Street  
Suite 501  
Boston 02109  
617-425-2606

Boston Public Library  
Copley Square  
Boston 02117  
617-536-5400

- ★ Walpole Public Library  
Walcott Avenue at Union  
Street  
East Walpole 02422  
617-668-0232

- ★ Western Massachusetts  
Funding Resource Center  
Campaign for Human  
Development  
Chancery Annex,  
73 Chestnut Street  
Springfield 01103  
413-732-3175 ext. 67

- ★ Grants Resource Center  
Worcester Public Library  
Salem Square  
Worcester 01608  
617-799-1655

**MICHIGAN**

Alpena County Library  
211 North First Avenue  
Alpena 49707  
517-353-6188

Henry Ford Centennial  
Library  
16301 Michigan Avenue  
Dearborn 48126  
313-943-2337

Purdy Library  
Wayne State University  
Detroit 48202  
313-577-4040

Michigan State University  
Libraries  
Reference Library  
East Lansing 48824  
517-353-8816

- ★ Farmington Community  
Library  
32737 West 12 Mile Road  
Farmington Hills 48018  
313-553-0300

University of Michigan-  
Flint Library  
Reference Department  
Flint 48503  
313-762-3408

Grand Rapids Public  
Library  
Sociology and Education  
Dept.  
Library Plaza  
Grand Rapids 49503  
616-456-4411

Michigan Technological  
University Library  
Highway U.S. 41  
Houghton 49931  
906-487-2507

**MINNESOTA**

- ★ Duluth Public Library  
520 Superior Street  
Duluth 55802  
218-723-3802

St. Paul Public Library  
Sociology Department  
300 Nicollet Mall  
Minneapolis 55401  
612-372-6555

- ★ Saint Paul Public Library  
90 West Fourth Street  
Saint Paul 55102  
612-292-6311

**MISSISSIPPI**

Jackson Metropolitan  
Library  
301 North State Street  
Jackson 39201  
601-944-1120

**MISSOURI**

- Clearinghouse for Mid-  
continent Foundations  
Univ. of Missouri, Kansas  
City  
Law School, Suite 1-300  
52nd Street and Oak  
Kansas City 64113  
816-276-1176

Kansas City Public Library  
311 East 12th Street  
Kansas City 64106  
816-221-7685

- Metropolitan Association  
for Philanthropy, Inc  
5600 Oakland, G-324  
St. Louis 63110  
314-647-2290

Springfield-Greene County  
Library  
397 East Central Street  
Springfield 65801  
417-866-4636

**MONTANA**

Eastern Montana College  
Library  
Reference Department  
Billings 59101  
406-657-2262

- ★ Montana State Library  
Reference Department  
1515 E. 6th Avenue  
Helena 59620  
406-449-3004

**NEBRASKA**

W. Dale Clark Library  
Social Sciences  
Department  
215 South 15th Street  
Omaha 68102  
402-444-4822

**NEVADA**

Clark County Library  
1401 East Flamingo Road  
Las Vegas 89109  
702-733-7810

Washoe County Library  
301 South Center Street  
Reno 89505  
702-785-4190

**NEW HAMPSHIRE**

- The New Hampshire  
Charitable Fund  
One South Street  
Concord 03301  
603-225-6641

- ★ Littleton Public Library  
109 Main Street  
Littleton 03561  
603-444-5741

**NEW JERSEY**

- ★ The Support Center  
17 Academy St., Suite 1101  
Newark 07102  
201-643-5774

New Jersey State Library  
Governmental Reference Unit  
185 West State Street  
P. O. Box 1898  
Trenton 08625  
609-292-6220

**NEW MEXICO**

- ★ Albuquerque Community  
Foundation  
6400 Uptown Boulevard,  
N.E., Suite 500-W  
Albuquerque 87110  
505-883-6240

New Mexico State Library  
325 Don Gaspar Street  
Santa Fe 87503  
505-827-3824

**NEW YORK**

New York State Library  
Cultural Education Center  
Humanities Section  
Empire State Plaza  
Albany 12230  
518-474-7645

Buffalo and Erie County  
Public Library  
Lafayette Square  
Buffalo 14203  
716-856-7525

Levittown Public Library  
Reference Department  
One Bluegrass Lane  
Levittown 11756  
516-731-5728

- Plattsburgh Public Library  
Reference Department  
15 Oak Street  
Plattsburgh 12901  
518-563-0921
- Rochester Public Library  
Business and Social  
Sciences Division  
115 South Avenue  
Rochester 14604  
716-428-7328
- Onondaga County Public  
Library  
335 Montgomery Street  
Syracuse 13202  
315-473-4491
- ★ White Plains Public Library  
100 Martine Avenue  
White Plains 10601  
914-682-4483
- NORTH CAROLINA**  
North Carolina State  
Library  
109 East Jones Street  
Raleigh 27611  
919-733-3270
- The Winston-Salem  
Foundation  
229 First Union National  
Bank Building  
Winston-Salem 27101  
919-725-2382
- ★ **NORTH DAKOTA**  
Western Dakota Grants  
Resource Center  
Bismarck Junior College  
Library  
Bismarck 58501  
701-224-5450
- The Library  
North Dakota State  
University  
Fargo 58105  
701-237-8876
- OHIO**  
Public Library of  
Cincinnati and Hamilton  
County  
Education Department  
800 Vine Street  
Cincinnati 45202  
513-369-6940
- ★ Ohio Dept. of Economic  
and Community Development  
Office of Grants Assistance  
30 E. Broad Street,  
24th floor  
Columbus 43215  
614-466-6652
- Toledo-Lucas County  
Public Library  
Social Science Department  
325 Michigan Street  
Toledo 43624  
419-255-7055 ext. 221
- OKLAHOMA**  
Oklahoma City University  
Library  
NW 23rd at North  
Blackwelder  
Oklahoma City 73106  
405-521-5072
- Tulsa City-County Library  
System  
400 Civic Center  
Tulsa 74103  
918-592-7944
- Tulsa City-County Library  
System  
400 Civic Center  
Tulsa 74103  
918-592-7944
- OREGON**  
Library Association of  
Portland  
Education and Documents  
801 S.W. Tenth Avenue  
Portland 97205  
503-223-7201
- PENNSYLVANIA**  
★ Northampton County  
Area Community  
College  
Learning Resources Center  
3835 Green Pond Road  
Bethlehem 18017  
215-865-5358
- ★ Erie County Public Library  
3 South Perry Square  
Erie 16501  
814-452-2333 ext. 54
- ★ Dauphin County Library  
System  
Central Library  
101 Walnut Street  
Harrisburg 17101  
717-234-4961
- ★ Lancaster Public Library  
125 North Duke Street  
Lancaster 17602  
717-394-2651
- The Free Library of  
Philadelphia  
Logan Square  
Philadelphia 19103  
215-686-5423
- Hillman Library  
University of Pittsburgh  
Pittsburgh 15260  
412-624-4528
- RHODE ISLAND**  
Providence Public Library  
Reference Department  
150 Empire Street  
Providence 02903  
401-521-7722
- SOUTH CAROLINA**  
★ Charleston County Public  
Library  
404 King Street  
Charleston 29403  
803-723-1645
- South Carolina State  
Library  
Reader Services  
Department  
1500 Senate Street  
Columbia 29211  
803-758-3181
- SOUTH DAKOTA**  
South Dakota State Library  
State Library Building  
322 South Fort Street  
Pierre 57501  
605-773-3131
- TENNESSEE**  
Knoxville-Knox County  
Public Library  
500 West Church Avenue  
Knoxville 37902  
615-523-0781
- Memphis Public Library  
1850 Peabody Avenue  
Memphis 38104  
901-528-2957
- ★ Public Library of Nashville  
and Davidson County  
8th Avenue, North and  
Union Street  
Nashville 37203  
615-244-4700
- TEXAS**  
• The Hogg Foundation for  
Mental Health  
The University of Texas  
Austin 78712  
512-471-5041
- Corpus Christi State  
University Library  
6300 Ocean Drive  
Corpus Christi 78412  
512-991-6810
- Dallas Public Library  
Grants Information Service  
1515 Young Street  
Dallas 75201  
214-749-4100
- El Paso Community  
Foundation  
El Paso National Bank  
Building, Suite 1616  
El Paso 79901  
915-533-4020
- ★ Funding Information  
Center  
Texas Christian University  
Library  
Ft. Worth 76129  
817-921-7000 ext. 6130
- Houston Public Library  
Bibliographic &  
Information Center  
500 McKinney Avenue  
Houston 77002  
713-224-5441 ext. 265
- Funding Information  
Library  
1120 Milam Building  
115 E. Travis Street  
San Antonio 78205  
512-227-4333
- UTAH**  
Salt Lake City Public  
Library  
Business and Science  
Dept.  
209 East Fifth South  
Salt Lake City 84111  
801-363-5733
- VERMONT**  
State of Vermont Depart-  
ment of Libraries  
Reference Services Unit  
111 State Street  
Montpelier 05602  
802-828-3261
- VIRGINIA**  
Grants Resources Library  
Ninth Floor  
Hampton City Hall  
Hampton 23669  
804-272-6496
- Richmond Public Library  
Business, Science, &  
Technology Department  
101 East Franklin Street  
Richmond 23219  
804-780-8223
- WASHINGTON**  
Seattle Public Library  
1000 Fourth Avenue  
Seattle 98104  
206-625-4881
- Spokane Public Library  
Funding Information  
Center  
West 906 Main Avenue  
Spokane 99201  
509-838-3361
- WEST VIRGINIA**  
Kanawha County Public  
Library  
123 Capitol Street  
Charleston 25301  
304-343-4646
- WISCONSIN**  
Marquette University  
Memorial Library  
1415 West Wisconsin  
Avenue  
Milwaukee 53233  
414-224-1515
- WYOMING**  
Laramie County  
Community College  
Library  
1400 East College Drive  
Cheyenne 82001  
307-634-5853
- **CANADA**  
Canadian Centre for  
Philanthropy  
185 Bay Street, Suite 504  
Toronto, Ontario M5J 1K6  
416-364-4875
- ENGLAND**  
★ Charities Aid Foundation  
12 Crane Court  
Fleet Street  
London EC4A 2JJ  
1-583-7772
- MEXICO**  
Biblioteca Benjamin  
Franklin  
Londres 16  
Mexico City 6, D.F.  
525-591-0244
- PUERTO RICO**  
Universidad del Sagrado  
Corazon  
M.M.T. Guevarra Library  
Correo Calle Loiza  
Santurce 00914  
809-728-1515 ext. 343
- VIRGIN ISLANDS**  
College of the Virgin  
Islands Library  
Saint Thomas  
U.S. Virgin Islands 00801  
809-774-9200 Ext. 487

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# RESOURCE VII

## *Membership*

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### **A** NATIONAL

#### **1. National Catholic Educational Association**

The National Catholic Educational Association has been providing leadership and service to Catholic educators since 1904.

NCEA is a voluntary membership organization serving the professional needs of its members at every educational level, both in school and out, through its many departments and service bureaus.

Every constituent department regularly meets with members' representatives to plan and implement needed projects and publications.

NCEA's purpose is to promote and encourage the principles and ideals of Christian education and formation; to encourage and provide means whereby Catholic educators and their institutions can work cooperatively and effectively for professional growth; to promote and interpret the Catholic educational endeavor and its contribution to the total national educational enterprise and to the general welfare of the nation; to seek and foster cooperation nationally and internationally between Catholic education institutions and agencies which promote the general welfare of society.

The NCEA issues publications available through membership.

These include:

- NCEA NOTES
- SEMINARY NEWS
- SEMINARIES IN DIALOGUE
- SPECIAL EDUCATION NEWSLETTER
- POLICYMAKER
- FORUM NEWSLETTER

- FARISH COORDINATOR OF RELIGIOUS EDUCATION
- PRIVATE SCHOOL LAW DIGEST
- CURRENT ISSUES IN CATHOLIC HIGHER EDUCATION
- UPDATE
- THE CATHOLIC PARENT
- MOMENTUM—NCEA'S professional journal, geared to the interests of administrators and teachers in Catholic schools, colleges and universities, and religious education centers. Sent to all members, it is also available by subscription. Yearly theme issue frequently available at half-price for bulk orders. Annual subscription: \$16. Single copies: \$4.50.

In addition to issuing regular periodicals dealing with professional information and insights, the NCEA publishes books and pamphlets on current educational issues and research. All NCEA books, pamphlets and multimedia materials are offered to NCEA members at special discount prices. As a member, you will be kept abreast of everything that NCEA publishes through special announcements and a publication brochure which is mailed periodically. The NCEA Standing Order Service is also available.

NCEA offers an excellent insurance program for members at special low-cost group rates:

- \$500,000 Professional Liability Plan
- \$1,000,000 Medical Protector
- Medicare Supplement
- Term Life
- Accidental Death
- Hospital Helper
- Salary Payer
- Cancer Coverage
- Headstart
- Life After 50

NCEA offers the following special services

- NCEA Annual Convention
- NCEA Computer Conference
- NCEA Development Conference
- Annual Chief Administrators Meeting
- Annual Supervision, Personnel and Curriculum Workshop
- NCEA Inservice Programs
- REDI/REOI/REKAP/IFG
- National Center for Research in Total Catholic Education
- NCEA Data Bank
- Vision and Values in the Catholic School
- National Center for Justice and Peace Education
- Education of Handicapped Persons
- Early Childhood Services
- NCEA Services for Boards
- NCEA Services for Parent Organizations
- Financial Consulting Services
- Special Travel Services
- Credit Card Program

*For further information contact:*

**Mrs. Rhoda Goldstein**  
**Vice President for Financial Affairs**  
**National Catholic Educational Association**  
 Suite 100  
 1077 30th Street, NW  
 Washington, DC 20007-3852

## 2. National Catholic Development Conference

### *A History of Commitment*

Since 1968, the National Catholic Development Conference has been the leader of the religious fund raising community. Its continuing commitment is to . . .

- foster and maintain the general public's confidence in the integrity of religious fund raising. NCDC Active Members agree to support the ethical framework embodied in the NCDC *Precepts of Stewardship* and the U.S. Bishop's *Guidelines for Fund Raising in the United States*.
- assist members in developing effective, up-to-date methods and strategies of fund raising for the efficient achievement of their goals.
- bring members together in their common interests and encourage unified action in their concerns.
- represent members' interests and positions before law makers, governmental agencies and other publics.
- inform the general public as well as the media of the important human needs met and outstanding services performed with the funds raised by NCDC members.

- provide a central office to serve as a forum through which members can learn, exchange information and discuss ideas and problems

### *Membership Categories*

NCDC welcomes as members the development officers and key fund raisers of charitable institutions and agencies, religious orders, dioceses, hospitals and educational institutions. In addition, commercial organizations professionally involved with fund raisers are eligible for membership.

*Active*—For Catholic organizations, all of which enjoy voting privileges. Annual dues are based upon philanthropic income. Groups listed in the Official Catholic Directory may only join this membership category.

*Professional Affiliation*—For non-Catholic organizations. All full time development staff are eligible for NCDC benefits and services.

*Associate*—Also for non-Catholic groups, this is an individual, personal membership, designed for the small development office. If you're a one man shop, this is for you.

*Corporate*—For commercial firms, providing products and services to fund raisers. Dues vary, depending upon exhibit and advertising benefits selected.

*For information about NCDC write:*

**Mr. George Lopez**  
**Director of Membership Services**  
**National Catholic Development Conference**  
 86 Front Street  
 Hempstead, NY 11550

## 3. National Catholic Stewardship Council, Inc.

The National Catholic Stewardship Council, Inc. is an organization primarily concerned with encouraging dioceses and parishes in implementing various programs of stewardship.

It was founded by the late Father Paul F. Kaletta, of the Archdiocese of St. Louis. It was in 1962, when under the sponsorship of Joseph Cardinal Ritter, a meeting was held in St. Louis, to which were invited, from the various dioceses of the United States, representatives, primarily priests, to exchange information and share ideas concerning church support. As head of the Archdiocesan Expansion Fund, Father Kaletta recognized the need for the development of a Catholic theology and philosophy of church support and envisioned the many benefits which would accrue to the Church by the sharing of information about the practices and methods used by the various dioceses in solving their financial problems.

Three years after this initial and highly productive meeting, another conference was scheduled. It was in August, 1965, at this meeting in St. Louis, Missouri, that officers were elected to serve for two years and charged with the responsibility to plan for the expansion of the organization.

From this point on, conferences were held annually, on a national basis, moving from St. Louis to Oklahoma City in October, 1966, to Kansas City, Missouri in November, 1967, at which approximately one hundred delegates from over fifty arch/dioceses were in attendance. A constitution was adopted and new officers were elected for a two-year period. A Board of Directors was also formed and the Most Reverend Albert R. Zuroweste, Bishop of Belleville, accepted an invitation to serve as the Council's Episcopal Moderator.

Columbus was to be the site for the National Catholic Stewardship Council's Fifth Annual Conference. Accepting Bishop Elwell's invitation to come to Ohio, were some one hundred delegates representing sixty arch/dioceses. As Annual Conferences continued through the years, more Ordinaries from many areas of the country expressed an interest in hosting the conferences. As a result, such meetings were held in Denver, Colorado; San Antonio, Texas; Pittsburgh, Pennsylvania; Tucson, Arizona; Arlington, Virginia; Detroit, Michigan; and New York, New York. St. Louis, Missouri and San Antonio, Texas were the sites chosen on more than one occasion.

At NCSC's Ninth Conference, the Most Reverend Edward E. Swanstrom, Auxiliary Bishop of New York, and Executive Director of Catholic Relief Services, accepted an invitation to serve as Associate Episcopal Moderator for the NCSC. In 1974, a national office was established in Washington, D.C. Bishop Zuroweste, because of age and the pressure of other duties, asked to be relieved as Episcopal Moderator, and the Most Reverend William G. Connare, Bishop of Greenburg, became Co-Episcopal Moderator, together with Bishop Swanstrom.

NCSC is, therefore, a service center whose goal it is to assist dioceses, parishes, religious communities, and organizations to: encourage adoption of the total Stewardship concept; foster the exchange of ideas among dioceses and other Church-related groups; promote the doctrine of shared responsibility and accountability as presented by the Council Fathers at Vatican II; help pastors and parish councils to educate and motivate parishioners to become better stewards by taking more active and meaningful roles in the mission areas of prayer and worship, Christian education, service and administration; and to help all Church members to recognize the importance for Church support to be based on the need for a person to give and to do so dependably and in proportion to one's blessings.

Members of NCSC benefit from many of the services and resources that are presently available. Among them are: the new Wills Awareness Seminar Kit; the Parish Stewardship Kit For Time and Talent, the Increased Offertory Parish Stewardship Kit; the Manual on Stewardship of Time and Talent for Lay Ministries (also printed in Spanish); and the Stewardship of Money Manual. Additional membership benefits include special registration fees for annual conferences, reduced rates on all publications, voting privileges, local seminars, personnel referral service, the exchange of program materials, and NCSC News.

The organization founded by Father Paul Kaletta has grown over the years, having had widespread influence on diocesan and parochial fund-raising activities throughout the United States and the Universal Church. His dedication, leadership, and foresight played a key role in founding NCSC and in nurturing it through its formative years. His appreciation for the principles of organization provided the NCSC with a steady and sustained growth. Of great importance, his wisdom helped to prevent it from making some of the fatal mistakes so characteristic of many other movements within the Church during the 60's.

The National Catholic Stewardship Council was originally founded as a fundraising oriented organization. With the development of a Catholic theology and philosophy of church support, however, the concept of total stewardship became better known and more universally accepted. As a result, NCSC committed itself to promoting Christian Stewardship as a way of life—that privilege and duty that is ours, as clergy, religious, and laity to share our gifts of Time, Talent, and Treasure . . . our very personhood . . . so that the Church in this day may be a "true reflection of Jesus and His way of Life".

*For information about NCSC write:*

**Mr. Amato A. Semenza**  
Executive Director  
NCSC, Inc.  
1 Columbia Place  
Albany NY 12207

#### **4. Council for Advancement and Support of Education**

The Council for Advancement and Support of Education (CASE) offers programs and services to help institutions

- build public understanding,
- step up the level of alumni involvement and support,
- improve government relations,
- recruit more students,
- strengthen communication with internal and external audiences, and
- increase private financial support.

CASE accomplishes these objectives in two major ways. First, it serves nationally as a principal public affairs arm for education, thus helping to create a favorable climate for the important work an institution is doing locally and regionally. Second, it offers a wide variety of programs to help members do a more effective job in their institution.

Membership in CASE is open only to nonprofit educational institutions listed in the *Accredited Institutions of Postsecondary Education* published by the Council on Postsecondary Education; to accredited independent elementary and secondary schools; to institutions listed in the *Universities and Colleges of Canada* and the *International Handbook of Universities*; and to independent alumni associations, college-related foundations, and system/central offices of universities.

No institution is eligible for membership unless it is entitled to exemption from federal income tax under Section 115(a) of the Internal Revenue Code of 1954 as a public education institution or under Section 501(c)(3) and Section 509(a)(1), (2), (3) of this code or similar provisions of prior or subsequent statutes.

*Further information about CASE programs, conferences, publications and memberships can be obtained from:*

**Office of the President  
Council for Advancement and Support of Education**  
Suite 400  
11 Dupont Circle  
Washington, DC 20036

## 5. National Society of Fundraising Executives (NSFRE)

The National Society of Fund Raising Executives, (NSFRE) is a professional organization of more than 4,500 fund raising executives with a national office in Washington, D.C. It is the only organization of its kind that operates within a strong, local chapter framework where persons of a variety of fund raising backgrounds meet together monthly in the interests of the profession.

Through over fifty chapters located in most states and major metropolitan areas, and through regional and national events as well, NSFRE offers meetings and educational programs that are affordable and convenient to attend.

Participation in NSFRE provides members with continuing education in their professional field, and with the opportunity to become well acquainted with their colleagues. As one new member said recently, "Since joining NSFRE, I no longer feel I'm on an island. I now know I'm part of a true profession."

As a professional society, NSFRE assists its members in their professional efforts . . . by providing a forum for dis-

cussion of common concerns . . . by providing opportunities for continuing professional education . . . by developing and disseminating pertinent information . . . and by fostering ethical standards for the management, direction and counseling of fund raising programs for philanthropic institutions and agencies.

A central purpose of NSFRE is to foster the development and growth of professional fund raising executives. Among the services provided to NSFRE members are:

- The annual International Fund Raising Conference.
- A Survey Course on Fund Raising Fundamentals offered throughout the country each year.
- Local meetings for addressing fund raising concerns and for the exchange of ideas.
- The opportunity to meet, work with and learn from other fund raising professionals in the field.
- *The NSFRE News*, the Society's newsletter, published ten times a year.
- Regular listings of job openings around the country printed in each issue of *The NSFRE News*.
- *The NSFRE Journal*, a magazine for fund raising professionals published twice a year.
- The quarterly *Sightlines*, an issues and analysis paper.
- Information on state and national legislative activity through *Legislative Alerts*.
- The availability of national staff for consultation and information.
- Career information.
- A program of professional certification to provide "credentials" for fund raising executives.
- Information from studies and research affecting fund raising.

*For further information contact the Society's national office:*

**National Society of Fund Raising Executives**  
Suite 3000  
1101 King Street  
Alexandria, VA 22314

## 6. Public Relations Society of America

The Public Relations Society of America (PRSA), headquartered in New York City, is the world's largest professional society for public relations practitioners. The Society's 12,372 members represent business and industry, counseling firms, government, associations, hospitals, schools and not-for-profit organizations.

Since it was chartered in 1947, PRSA has continued to provide a forum for the discussion of issues affecting the profession, and the resources for promoting the highest in professional standards.

PRSA has 91 chapters throughout the United States. Some 10 national committees, boards and task forces monitor and act upon such national concerns as First



Amendment freedom, educational affairs and social responsibility.

Members can choose to belong to one or more of the Society's 14 professional-interest sections. Sections offer members the opportunity to explore issues and concerns unique to their fields of specialization.

PRSA's major service to its members is an integrated professional development program. Guidebooks, conferences, seminars, publications, and other materials aid members at every career level in maintaining existing professional skills and acquiring new ones.

PRSA firmly believes that professional integrity is based on sound and ethical practice. Upon joining the Society, members agree to adhere to the PRSA "Code of Professional Standards."

In 1965, PRSA established a voluntary Accreditation program. Members with at least five years of professional experience may earn Accredited status by passing written and oral examinations. Accredited status attests to a professional's competency in the practice of public relations. Upon successful completion of the examinations, individuals may use the letters APR (Accredited in Public Relations) next to their name.

The PRSA Information Center, located at the national office, contains the world's largest library of public relations texts, articles, guidebooks and other relevant materials. Information is available on some 600 subjects. Each year the Center answers more than 17,000 requests for information and receives more than 1,000 visitors.

Each month, members receive the *Public Relations Journal*, which provides members with current information on public relations theory and techniques, and covers the issues that affect society and its institutions. *PRSA News Briefs*, published in the *Journal*, contains information on PRSA and professional development programs.

"The Professional Connection" is PRSA's career referral service, which is available to members and nonmembers. Job seekers can dial a special telephone number, 212/308-7284, and hear a recording, updated weekly, of available public relations positions. Employers who would like available public relations jobs listed with the service should call 212/826-1750, extension 49, or write the national office.

Available from PRSA is the *National Directory of Speakers on Public Relations Topics* containing some 250 qualified speakers with expertise on a variety of significant public relations topics. The *Directory* is a valuable resource for planning public relations workshops.

The Foundation for Public Relations Research and Education, established in 1956, undertakes projects that benefit the entire profession.

PRSA's commitment to professional development extends to the student level. The Public Relations Student Society of America (PRSSA) has 5,000 members and 140 chapters on college campuses across the country. An internship program, PRIDE—Public Relations Internships to Develop Expertise—gives qualified PRSSA members the opportunity for at least one internship during their academic careers.

The Information Center, located in PRSA Headquarters, is maintained as a lending and reference service for public relations professionals. Material consists of articles, brochures, manuals, kits and speeches dealing with public relations and related subjects.

For many PRSA members the Center has long been considered one of the most important services. In 1983, the Center responded to over 20,000 queries, most within 24 hours. With the maintenance of 800 subject files, the Center claims the largest collection of public relations materials in the world. To assist you in receiving the maximum benefit from the Center please follow the simple procedures outlined below.

- Please address all requests and return all material to: PRSA Information Center, 845 Third Avenue, 12th Floor, New York, NY 10022 212/826-1776.
- When requesting material please be as precise as possible so as to receive appropriate items. When you need information on a topic not shown, ask for it. We may have it; if not we will try to get it for you.
- Please limit requests to three subjects at a time.
- Because of the volume of requests, the maximum loan period is three weeks.
- A charge slip accompanies each loan packet specifying fees. Cost: Members \$13 (\$10/usage plus \$3 postage/handling); Nonmembers \$43 (\$40/usage plus \$3 postage/handling).
- Members who visit the Center have free use of directories and winning Silver Anvil entries. For use of all other materials, member visitors pay \$10. Nonmembers who visit the Center pay \$10 for use of directories and \$20 for use of all other materials. Note: If a nonmember joins PRSA within 60 days of using the Center, fees paid will be subtracted from the new member's dues.
- A bibliography of public relations books and periodicals is prepared annually and is available through the Center.

# **B** LOCAL

There are many local, diocesan or state-wide organizations which development personnel may find helpful. These include:

- Diocesan Pastoral Council
- Local Parish Organizations
- Chamber of Commerce
- Local Advertising Clubs
- Publicity and Public Relations Organizations
- Service and Community Clubs