

CONSULTANTS For Philanthropy, Inc.

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HOME OFFICE: 311 California Street / San Francisco, CA 94104 / (415) 392-8950

January Eleventh
Nineteen Seventy-Seven

Mr. Clarence K. Chu Hing
Chairman, Board of Trustees
Kawaiahao Church
957 Punchbowl Street
Honolulu, Hawaii 96813

Dear Mr. Chu Hing:

In accordance with your request we are pleased to submit our firm's credentials and recommendations for fund raising consultative services.

Consultants For Philanthropy, Inc., is a regional fund raising corporation of experienced accredited professionals who specialize in fund raising for religious, educational, health, social and cultural causes.

CPI is incorporated in the State of California. It has offices and local consultants in San Francisco, Seattle, Portland, Los Angeles, San Diego and Honolulu.

CPI serves clients only in the Western States. Because its resources are concentrated on a regional basis it operates on a low overhead. Therefore, it can offer clients greater availability and services at lower costs.

CPI's service fee is \$5,500 per month for full-time on the scene direction or \$275.00 per day for consultative direction.

CPI provides all clients with year round executive consultation and supervision on pre-campaign, active campaign and post campaign matters.

CPI raises capital funds, operating funds and endowment funds. Depending on the nature of the plan, all CPI directed development programs include aspects of deferred gifts.

In the fiscal period August 1, 1975, through July 31, 1976, CPI was called upon to serve more clients in the West than any other fund raising firm in the United States.

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1975 - 1976 CPI CLIENTS

Notre Dame High School, Salinas, Calif.	Rev. Msgr. Thomas Earley
Bellormine College Preparatory, San Jose, Calif.	Rev. Robert Mathewson, SJ
Christian Brothers High School, Sacramento, Calif.	Bro. Ronald Roggenbach, FSC
Sacred Heart High School, San Francisco, Calif.	Bro. Arnold, FSC
Serra High School, San Mateo, Calif.	Rev. Carl Schipper
Grace Cathedral, San Francisco, Calif.	Very Rev. Stanley F. Rogers
Center for the Performing Arts, San Francisco, Calif.	Mr. Samuel Stewart
Kahuku Community Hospital, Kahuku, Hawaii ✓	Ms. Donna Maiava L51.00 75.00 71.00
Diocese of Monterey, Monterey, Calif.	Mo. Rev. Harry A. Clinch
Archdiocese of San Francisco, San Francisco, Calif.	Mo. Rev. Joseph T. McGucken
Notre Dame High School, Belmont, Calif.	Sr. M. Paula
Notre Dame High School, San Jose, Calif.	Sr. Mary Jean
Holy Spirit Church, Sacramento, Calif.	Rev. Msgr. Edmund O'Neill
Church of the Nativity, Menlo Park, Calif.	Rev. Clement A. Davenport
Mercy High School, San Francisco, Calif.	Sr. Maguerite Buchanan
St. Vincent's School for Boys, San Rafael, Calif.	Rev. Msgr. Peter Armstrong
St. Peter's Church, Pacifica, Calif.	Rev. William O'Connell
Archdiocese of Portland, Portland, Oregon	Mo. Rev. Cornelius M. Power
Moreau High School, Hayward, Calif.	Rev. Gordon Wilcox, CSC
Sisters of the Holy Names, Spokane, Wash.	Sr. Shelia McEvoy
Holy Family Church, Las Vegas, Nevada	Rev. Ben Franzinelli
St. Andrew's Priory School, Honolulu, Hawaii ✓	Rev. Fred G. Minuth



CURRENT PATTERNS IN PHILANTHROPY

Discussion of a development program should take into consideration an understanding of the pattern of philanthropy as it exists today throughout the United States.

Concerns over inflation, recession, the energy shortage, the vagaries of the stock market, farm prices and other factors can often be intimidating and misleading. They can result in invalid conclusions regarding a given constituency's ability to support a fund raising program.

In 1975, despite the continuing problems of inflation and unemployment, philanthropy in America reached a new record high. TOTAL GIVING amounted to \$26.88 BILLION, a 6.5% increase over 1974 as follows:

LIVING INDIVIDUALS gave \$21.44 BILL. or 79.7%, up 8.3% and BEQUESTS represented \$2.23 BILL., or 7.7%. Thus, INDIVIDUALS living and deceased accounted for 87¢ out of every dollar contributed in 1975.

FOUNDATIONS gave \$2.01 BILL. or 7.5%, a decrease of 4.7% from 1974, resulting from lower asset values and a cut by the Ford Foundation.

CORPORATIONS gave \$1.20 BILL. or 4.5%, a decrease of 1% from 1974.

Continued
RELIGION continued to rank first in priority of the American peoples charitable dollar. Giving to religion reached a record high of \$11.68 BILL. or 43.5% of the total, up 7.6% over 1974.

HEALTH & HOSPITALS is the second largest recipient of the \$26.88 BILL. that was given away, receiving \$4.01 BILL. or 14.9%, up 2.8% over 1974.

EDUCATION, which ranked second in the decade of the sixties, fell further behind, receiving \$3.59 BILL. or 13.3% of the total, down 3.5%.

SOCIAL WELFARE received \$2.46 BILL. or 9.2%, up 5.1%.

ARTS & HUMANITIES received \$1.94 BILL. or 7.2%, up 5.2%.

CIVIC - PUBLIC received \$.82 BILL. or 3.0%, up 15.4%.

OTHER (Foreign Assistance) received \$2.38 BILL. or 8.9%, up 1.3%.

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PHASES OF SUCCESSFUL INSTITUTIONAL DEVELOPMENT

A. ACTION PLANNING PHASE - Research and Planning

- . Tests and measures, plans and objectives
- . Obtains advice and assistance of leadership
- . Identifies and determines donor potentials
- . Determines costs, resources and procedures

B. THE CAPITAL FUND - Multi year (3-5) pledge campaign

- . Includes immediate and long range plans and objectives
- . Includes case for capital, operations, and endowment
- . Seeks 3-5 year pledge and cash gifts
- . Cultivates individuals, corporations, and foundations
- . Establishes framework for subsequent development activities

C. THE ANNUAL APPEAL

- . Low-keyed sustaining appeal each year
- . Usually for operations
- . Seeks one year cash or pledge gift
- . Presented to all past donors and regular constituents

D. THE ENDOWMENT PROGRAM

- . Seeks to build a corpus, the income from which can be used for general purposes
- . Presented to all past capital and annual donors
- . Seeks "special" new donors
- . Offers "quid-pro-quo" tax and income benefits
- . Involves bequests, stocks, insurance, land and other assets

Ways to increase sales

• Increase prices

• Increase quality of products

• Increase advertising budget

• Increase promotional activities

• Increase number of sales staff

• Increase number of sales calls per customer

• Increase number of sales calls per day

• Increase number of sales calls per week

• Increase number of sales calls per month

Marketing

• Increase prices

• Increase quality

• Increase advertising budget

• Increase promotional activities

THE BASIC FUND RAISING FORMULA

A fund raising campaign cannot be conducted properly unless four basic factors can be demonstrated.

- A. A VALID CASE TO MERIT SUPPORT FROM DONORS
- B. COMMITTED LEADERSHIP TO ADVOCATE THE CASE
- C. A SUFFICIENT NUMBER OF PAST AND PRESENT DONORS, AS WELL AS NEW PROSPECTIVE DONORS
- D. A REALISTIC PLAN FOR LEADERSHIP TO PRESENT THE CASE TO PROSPECTIVE DONORS IN A DIGNIFIED MANNER IN ACCORDANCE WITH A SPECIFIC TIMETABLE

SEQUENCE OF A DEVELOPMENT PROGRAM

Every fund raising program must evolve through six sequences. The extent of activities in each sequence are determined by the nature and scope of the project.

<u>SEQUENCES</u>	<u>ACTIVITIES</u>
1. EVALUATION	OUTLINE GENERAL CASE INTERVIEW KEY LEADERS IDENTIFY PRIME PROSPECTS IDENTIFY PRIME LEADERSHIP FORMULATE SPECIFIC PLAN
2. ORGANIZATION	FINALIZE COMPREHENSIVE CASE FINALIZE MASTER LIST OF PROSPECTS FINALIZE OPERATIONS AND PR TIMETABLE FINALIZE EXECUTIVE COMMITTEE FINALIZE INDIVIDUAL, CORPORATE AND FOUNDATION COMMITTEES
3. ORIENTATION	OVERALL PLAN, OBJECTIVES, TECHNIQUES INDIVIDUAL CORPORATE AND FOUNDATION COMMITTEES RECRUIT ADDITIONAL VOLUNTEERS EXPAND PROSPECT POTENTIALS KEY ADVANCE ASSIGNMENTS

Journal of Health Politics, Policy and Law, Vol. 27, No. 4, December 2002
ISSN 0361-6878 • 10.1215/03616878-27-4 © 2002 by The University of Chicago

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Sequence Of A Development Program (cont'd.)

<u>SEQUENCES</u>	<u>ACTIVITIES</u>
4. CULTIVATION	BROCHURE PRESS CONFERENCE TOURS, GUEST SPEAKERS SEMINARS SMALL DINNERS, RECITALS
5. SOLICITATION	TRAINING, ASSIGNMENT, REPORTS ADVANCE GIFTS (I.C.F.) SPECIAL GIFTS (I.C.F.) GENERAL GIFTS (I.C.F.) PUBLICITY
6. FOLLOW-UP	FINAL REPORT FOLLOW-UP RECOMMENDATIONS THANK-YOU & RECOGNITION PLAN POST-CAMPAIGN NEWSLETTER PLEDGE PAYMENT SYSTEM MONTHLY PROGRESS REPORTS

WHAT QUESTIONS MUST BE ANSWERED BEFORE WE BEGIN A FUND RAISING PROGRAM?

- 1.) The "Case" --- Is the "Case" for Kawaiahao Church worthy enough in the minds of prospective leaders and donors to attract meaningful support?
- 2.) The Leadership --- Exactly who are the leaders and how much of their advice and support can be relied upon during a specific period of time?
- 3.) The Donors --- Who are the donors? What support can be expected from individuals, corporations, and foundations? What is the potential for major gifts, special gifts and general gifts?
- 4.) Management Resources --- Are the present management resources sufficient enough to achieve the maximum potential? How long will it take? What resources will be necessary? How much will it cost?

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RECOMMENDATIONS

- January 21,*
1. It is CPI's recommendation that the Leadership of Kawaiahao Church initiates an Action Planning Phase to begin ~~January 15~~, 1977.
 2. It is recommended that CPI's services be retained to plan, direct, organize and supervise all fund raising activities.
 3. It is recommended that the results of the Action Planning Phase and the entire Fund Raising Program be presented to the Church membership at the biannual meeting scheduled for March.
 4. It is recommended that an Action Planning Phase Committee be recruited as soon as possible to assist and advise CPI.
 5. It is recommended that a Development Office be opened and that a secretary be hired as soon as possible to assist CPI and the Action Planning Phase Committee.

To assist you and others in evaluating our recommendations, we feel that the following explanation of the proposed Action Planning Phase would be appreciated.

THE REASONS FOR THE ACTION PLANNING PHASE

The Action Planning Phase is the logical first step in assuring the success of the subsequent Fund Raising Program. It will provide the necessary information to conduct the Fund Raising Program in the most efficient and dignified manner at the lowest possible cost.

It must be noted once again that the strength or weakness of any one or all of the factors presented in question form on page 6 will have a direct bearing upon:

- A. The amount of money that can be raised.
- B. The amount of time that will be necessary to raise the funds.
- C. The ultimate costs that will be incurred to raise the funds.
- D. The methods and procedures that will have to be used to raise the funds.

THE OBJECTIVES OF THE ACTION PLANNING PHASE

In addition to providing the most realistic plan possible to the Church membership, the manner in which the Action Planning Phase will be conducted will also:

- A. Foster a positive image of the Church and the leadership's plans to improve its activities and functions.
- B. Serve to disclose new leadership potential.
- C. Serve to disclose new prospect potential.

THE OBJECTIVES OF THE ACTION PLANNING PHASE (cont'd.)

- D. Disclose possible pitfalls and fences to be mended.
- E. Increase potential and decrease subsequent fund raising costs.

THE REPORT TO THE MEMBERSHIP WILL INCLUDE:

- A. A professional assessment of attitudes and dispositions towards the Church and its plans for development.
- B. A complete timetable and plan to achieve all financial potentials.
- C. A projection of all costs that would be involved.
- D. The "Case" statement.
- E. Gift plans.
- F. The organization chart.
- G. An explanation of how and who developed the Fund Raising Program.

THE VALUE OF PRESENTING THE PLANS AND REPORT

The membership's response to the needs of the Development Program are crucial to the success of the entire Fund Raising Program. Without whole hearted support from the membership, Church leadership can expect minimal support from the community at large. If, on the other hand, the fund raising plans are well founded and based on membership input and presented in a clear cut fashion, it would only be reasonable to expect extensive membership support. Therefore enhancing the Church's chances of soliciting greater support from the community in general.

The entire two and one-half months will not be spent in evaluating the membership's potential. ^{only} Only a certain portion of the Action Planning Phase will devote itself to evaluating corporate as well as foundation potentials

THE PROCEDURES OF THE ACTION PLANNING PHASE

To begin the Action Planning Phase, I will meet with a key group of individuals (Suggestions will be taken at this meeting.) who will be the nucleus of the Action Planning Phase Committee. It will be our responsibility to select the remainder of the Action Planning Phase Committee. The Action Planning Phase will number between twelve and fifteen individuals and will be required to devote between fifteen and twenty hours towards the program between now and the membership meeting. *Great* The prime responsibility of the committee will be:

- A. To interview approximately ten fellow Church members.
- B. To assist in the preparation of letters and questionnaires to be distributed.

THE PROCEDURES OF THE ACTION PLANNING PHASE (cont'd.)

- C. To assist in the evaluation of collected data.
- D. To assist in the selection of those to be interviewed.
- E. To assist CPI in whatever way possible to further the objectives of the Action Planning Phase.

Once the Committee has been formed it will meet to discuss the "Case Statement" and review the Action Planning Phase Timetable. (All preliminary materials will be provided by CPI.) A list of approximately one hundred individuals will be selected to be interviewed and a questionnaire will be developed.

After the selections and questionnaires have been developed, a letter will be prepared and mailed to the prospective individuals. The Committee will be trained by CPI to know how to interview.

A second letter and questionnaire will be developed and mailed to all the members of the Church. This letter will outline the present plans and objectives of the Action Planning Phase.

During the next ten to twelve weeks it will be our objective to also initiate and complete as much of the following as possible:

- A master file of prospective donors from among foundations, corporations, and most important of all, individuals.
- A review and analysis of all past and current donors.
- A revised method by which to receipt, record and follow-up all gifts.
- Establish a list of general community leaders. Corporate-Foundation.
- Develop a public relations timetable that will coincide with the fund raising effort.
- Obtain endorsements for the Church's plans and fund raising project.

Many items can, and will, be added to the list. The important thing to realize is that the Action Planning Phase is the first step in the Fund Raising Program and that this effort will insure the success of the subsequent phases.

COSTS

The professional fee for the proposed Action Planning Phase would be \$4,950, payable as follows:

January 21, 1977, four days of service	\$1,100.00	275
February 1, 1977, six days of service	1,650.00	18 day
March 1, 1977, eight days of service	2,200.00	2200 275 49 50

If there is a need to continue the services of CPI as fund raising counsel after March 31, 1977, Kawaiahao Church has the option to continue the services of CPI at the base rate of \$275.00 per day as long as an agreement has been entered into by February 15, 1977.

April

The operating budget for the proposed project would cover the following items:

1. The cost of local transportation. \$10.00 per day for each day of service. January \$40.00, February \$60.00, March \$80.00, or a total of \$180.00.
2. The cost of paper, postage and letter shop would not exceed \$200.00.
3. The secretarial staff is a must and will cost approximately \$1,000.00.

Initiation of the Action Planning Phase should begin as soon as possible. You will find that TIME is the biggest and ultimately the costliest problem in church development. If our credentials and this proposal prove satisfactory to you and your Board, we do hope we can soon discuss a convenient date to meet with the Committee to begin.

We would welcome the opportunity to assist you and would be honored to become associated with such a fine church.

Sincerely and respectfully yours,

Edward R. Monahan

Edward R. Monahan
Executive Vice President
Consultants For Philanthropy, Inc.

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TO: KAWAIAHAO BOARD OF TRUSTEES
DATE: August 17, 1977
FROM: KAHU AKAKA

Dear Trustees of our Beloved Kawaiahao:

1. Owen and Mary K. Burman Scholarship Gift

I have received a gift of \$14,377.00 from dear friends Owen and Mary K. Burman, the interest from which is to be used by Kawaiahao for scholarship assistance to our young people in furthering their careers. Mrs. Burman's father was a fine Christian philanthropist, one of whose interests was in helping young people prepare for the Christian Ministry, or serving our Lord in other fields as Christians. His children have decided to convert the assets of his Foundation into cash, and to distribute them to beneficiaries they have chosen. I first met the Burmans while preaching at Corona, California. I have asked them if they could write in a special letter to me and to trustees her specific instructions for the deposit or investment and use of this scholarship gift. I have conveyed the check to our Business Office.

2. Harold Hutchison Will

Attached to my report is a copy of the will of my dear friend Harold K. Hutchinson of Seattle, in which he names Kawaiahao as a beneficiary. Mr. Hutchinson died last year.

Sunday Nov. 7, 1977

3. Re next meeting of Membership: Sunday, October 30th. or

Our next meeting of Kawaiahao's Membership comes in about two months. This is our meeting to approve the Budget for 1978. Program sectors have usually prepared their budget in September, discussed them in Budget-Preparation Workshop a month before the semi-annual meeting. In our membership meeting of Nov. 1, 1976 members asked that "trustees prepare a Budget for 1978 BEFORE THE Council Workshop participate in the Council Workshop of which it is a part, and thus with other church leaders in preparing and evaluating church programs and budget for the coming year." The purpose is to effect better coordination and cooperation in and programming the life and work of Kawaiahao. I suggest that the Finance Committee chairman of our Board meet with the Chairman of the Council and work out a way of implementing this mandate from Kawaiahao members.

4: RESTORATION FUND: MEMBERSHIP PORTION OF THE CAMPAIGN

Trustees and I are expected to provide key inspiration and leadership. Frank Stephan has asked my help in securing preliminary gifts for Kawaiahao's portion of the overall campaign, that it would be a source of great encouragement and inspiration to our members if we could secure special gifts from twelve members of Kawaiahao who are able to give amounts totaling half our goal as follows:

One gift of \$15,000.....	\$15,000
Two gifts of \$10,000.....	20,000
Four gifts of \$5,000.....	20,000
Five gifts of \$1,000.....	5,000

We have no inside knowledge of how much members have and what they can give. All we can do is make our need known, let them pray over the need and give what they feel they can give as a generous and sacrificial gift.

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It would be helpful if the first pledges come from me and our trustees. What we do as leaders of our Church will set the pace for all our members.

Let's do our best before October 2nd and try to help Brother Sammy Mokuahi and Committee launch an enthusiastic campaign on October 2nd. Sammy has a plan for a potluck dinner the last Sunday of this month, before I go on my vacation. Please give priority to this. Mahalo Nui Loa.

Me ke Aloha iloko o Kristo,

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