

# Marketing Elements in Fundraising: An Analysis of Foundations in the State of Santa Catarina /Brazil

Dr. Lucila Maria de Souza Campos  
Universidade do Vale do Itajaí  
[lucila.campos@terra.com.br](mailto:lucila.campos@terra.com.br)

Ricardo Boeing da Silveira, MSc.  
Universidade do Vale do Itajaí  
[boeing@univali.br](mailto:boeing@univali.br)

Dr. Rosilene Marcon  
Universidade do Vale do Itajaí  
[rmarcon@univali.br](mailto:rmarcon@univali.br)

## Abstract

*The Social Economy growth in Brazil, according to the literature, has caused a fierce competition for resources that finance their projects. This fact has developed into actions previously considered exclusively from organizations in the private sector, such as segmentation, communications and relationship marketing. With this in mind, an investigation was carried out about the current differences between the executions of those marketing elements (segmentation, communication and relationship marketing) in foundations of the State of Santa Catarina, located in the southern region of Brazil. These foundations were identified by the Brazilian Public Minister and were separated in two different groups: the ones with educational characteristics and the ones with non-educational characteristics. The method used was the discriminant analyses. The results of the analyses showed evidence that both groups would make the communication/promotion, segmentation and relationship marketing in specific ways, saved some expectations, besides presenting a lack of focus on their objective.*

## Abstrait

La croissance de l'économie sociale au Brésil, selon la littérature, cause une forte dispute à la recherche des ressources qui financent leurs projets. Cela a suscité le développement des actions de caractère autrefois considérés d'exclusivité du second secteur (le marché), comme la segmentation, la communication et le marketing de relations. Devant celui-ci, les recherches ont été faites pour identifier les différences existantes à l'exécution de ces éléments de marketing dans des fondations à l'État

de Santa Catarina, située à la région sud du Brésil. Les deux fondations ont été identifiées à travers le Ministère Public et ont été séparées dans deux différents groupes: celles avec des caractéristiques éducatifs et celles avec des caractéristiques non éducatifs. La méthode utilisée a été l'analyse discriminante. L'analyse des résultats a prouvé que les deux groupes réalisent communication/promotion, segmentation et marketing de relations de manières spécifiques, sauf quelques exceptions et de plus, elles ont manqué l'objectif de leur finalité.

## Resumen

*El crecimiento de la Economía social en Brasil, de acuerdo con la literatura, ha causado una disputa cada vez más exacerbada por recursos que financien sus proyectos. Tal hecho ha acarreado el desarrollo de acciones de carácter anteriormente considerado de exclusividad del segundo sector (mercado), como segmentación, comunicación y marketing de relacionamiento. Delante de eso, se han investigado las diferencias existentes entre la ejecución de esos elementos de marketing en fundaciones del Estado de Santa Catarina, localizado en la región sur de Brasil. Dichas fundaciones fueron identificadas por intermedio del Ministerio Público y fueron separadas en dos grupos distintos: aquellas con características educacionales y aquellas con características no educacionales. El método usado ha sido el análisis discriminante. El estudio de los resultados ha evidenciado que los dos grupos realizan la comunicación/promoción, segmentación y marketing de relacionamiento de maneras específicas, salvo algunas excepciones, además de que presentan falta de foco en su finalidad.*

## **1. Introduction**

Currently, competition between the organizations that compose the third sector – foundations, non-governmental organizations, private social assistance entities and communitarian associations – is growing, intense and due to two perspectives: competition between non-profit organizations and their competition with profit making organizations. These concepts can be defined due to two corresponding factors: firstly, the growth in number of organizations grouped in the third sector, that causes a more difficult fight for the attainment of third party financial resources that allow the performance of their projects; secondly, the competition between non-profit and profit making organizations, that happens when the first group decides to offer commercial goods in order to obtain financial resources for their activities and that guarantee their self-subsistence, diverting these organizations from the obligation of obtaining resources from other sources, such as for example individual, business or partnership donations, (TENÓRIO, 1999; MURPHY, J., 2000; MARCUELLO, 2001; SAYER, 2004).

Many third sector organizations such as foundations and associations use tools that facilitate management, leadership, organization and control of their work routines. Marketing is one of the tools used and that can help in the attainment of these important financing sources. However, third sector marketing, according to Newman and Wallender (1978), and Shapiro (1978), is different from how it is practiced in private, profit making businesses, where marketing allows more sales, that reverted in profit, can be distributed between their employees as well as reinvestment, turning into resource sources. In non-profit organizations, financial surplus is not distributed, and the entire donations and/or sales sum is used for the preparation and development of projects.

Different actions can be analyzed in this situation, because a marketing action wanted by the sponsor, whether the government or a private institution, is totally different from a

campaign aiming the collection of funds from citizens. In other words, segmented actions for individuals shall be prepared in a differentiated form of strategies developed to pursue resources arising from government or legal entities (SHELLEY and POLONSKY, 2002). Differences can also be found in works where marketing promotes a social cause, such as awareness regarding the dangers caused by drugs, for example. Thus, it is understood that the marketing used in third sector organizations goes beyond client-supplier relationships, which characterizes the market and that although has a connection with the marketing performed in this environment, presents a group of specific methodologies that shall be taken into consideration (SCHIAVO, 1999). In the market, the client is the provider of resources and in the third sector the client is benefited, not the sponsor.

Market positioning, brand reinforcement, segmentation, relationship marketing, internal marketing, compound marketing strategies are some of the marketing elements used by organizations in the market in order to improve business to grow and succeed. The elements chosen within this work (promotion/communication, segmentation and relationship marketing) are distinctly important and deserve deeper study. Peattie (2002), Gainer & Padanyi (2002) certify that promotion (communication) utilized by third sector organizations have great potential that should be explored. Sargeant (1999a) identified a series of variables that demonstrate the differences in behavior among people, highlighting the importance of market segmentation, where each segmentation has similar characteristics, facilitating the preparation of actions focusing client retention programs, even regarding non-profit organizations. To complete the group of elements to be studied, we have relationship marketing. Bowen *et al* (1989) and Levitt (1990) reinforce the idea of increased product, asserting that, in order to conquer differentiation, it's not enough to give what the client expects, but to deliver more than they think they need or more than they are used to expect. In the case of the third sector, actions that produce a positive and long lasting relationship can produce partnerships that guarantee the survival of such organizations.

This study is intended to analyze the behavior of promotion/communication, segmentation and relationship marketing performed in two different groups of third sector organizations – foundations with educational characteristics and foundations with non-educational characteristics, when taken into account fundraising to achievement planned activities. This was performed through an interpretive research methodology with quantitative characteristics.

## **2. Theoretical Statement**

Several researches analyzed the utilization of promotion, segmentation and relationship marketing in fundraising in third sector organizations. Gainer and Padanyi (2002); Stephens (2004); Higgins and Lauzon (2003); Arnold and Tapp (2003); Martinez (2003); Shelley and Polonsky (2002); Kotler and Levy (1969); Arnett, German and Hunt (2003); Varadarajan and Menon (1988); Sargeant (1995); Romney-Alexander (2002); Andreasen (1996); Murphy, J. (2000); Abdy and Barclay (2001); Sargeant (2001); Kottasz (2004); Nichols (2004); Peattie (2002) found in their studies subsidies to state that these three elements positively influence the fundraising. On the other hand, Shelley and Polonsky (2002) encountered results contrary to the aforementioned.

For the correct management of the third sector organizations' activities it's necessary, according to Marcuello (2001), to analyze three aspects of critical importance for its efficiency. The first is the theory of organizations; considered a scientific body of knowledge, a conceptual system that studies organizations' social and economic realities; scientifically explaining their structures and functions. The second is the economic theory that studies organizations and the organizational phenomenon, using concepts arising from the organizational theory, organizational behavior and micro economics. This doctrine offers the basic theory for the understanding managers should have, such as resources allocation and

structural interrelations. The third aspect is strategic management, because it facilitates the choice of different businesses and determines the way in which businesses compete. This process aggregates organizational design's characteristics, choice and implementations of strategies, decision making, restructuring, organizational learning and objectives of control.

Traditional administration techniques, applied for both public and private sectors, find limitations when simply transferred to the third sector. In social organizations, the lack of profit and an owner with a central focus make values, such as participative management, priority on target public assistance, commitment with the mission, human being valorization and commitment with others, prevail (HUDSON, 1999; MEREGE, 2000; TENÓRIO, 1999).

Wolf (1999) cites that there are some methods through which non-profit organizations obtain financing: Unrestricted donations and individual contributions; Corporate support; Foundations and public agencies; Delayed donations. Several tools are utilized aiming at achievement of financing for the implementation of projects developed by third sector organizations. Marketing is one of these, with its varied range of elements that allow the aggregation of value and attainment of competitive advantage in the market. However, does it work this way in an environment where profit isn't the aim?

Shapiro (1978) highlights that although the marketing function is differentiated in non-profit organizations, certain business concepts can be adopted to enhance their operations. Kotler and Zaltman (1971) tried to frame marketing into a new sphere, a social sphere, and they defined it as being the project, implementation and control of programs that look to increase the idea's acceptance, cause or social practice among a target-group, utilizing concepts of segmentation and communication, in order to maximize the reaction of such target-group.

According to Cruz and Estraviz (2000) a professionalized management in third sector organizations requires fundraising area structuring. The organization needs, in a first stage, to

bring together the history, and background in its process of attaining resources. It is also important that the organization knows the possible financiers, the sources that can potentially provide greater financing; those that can restrict them and those that are the most alike the institution. This process has the objective to pursue the organization's financiers portfolio diversification, avoiding its' financial dependence with only one source.

Adapting marketing compound to third sector organizations we have: product - offered programs and services; promotion – communication performed to promote such programs and services; price – or the cost to participate or prepare them; market – or where the products, programs and services are available (WOLF, 1999).

Kotler (1978) highlights that in the promotion, because it includes personal contact, advertising, publicity and sales promotion must have standards established in order to reach their targets (that in the case of this research is fundraising), having to select its target-public and the media to be utilized.

Authors such as Nichols (2004); Peattie (2002); Murphy, J. (2000); Desmet (1999); Andrade (2002) highlight the importance of promotion (communication) in non-profit organizations, not only as a fundraising strategy, but as the organization's main activity of continuous image building, facilitation of the establishment of partnerships and implementation of developed projects.

Other actions are considered extremely important in order to maximize the organizations' results. Choosing their target public and strategies management can be crucial in winning clients, once all attentions are focused on their needs. Market segmentation enables this reality, allowing a greater business interaction with its consumers. Researches performed by Kottasz (2004); Nichols (2004); Andreasen (1996); Romney-Alexander (2002); Sargeant (1995); Sargeant (1999a); Kotler and Levy (1969); Higgins and Lauzon (2003); Wagner and Ryan (2004); Desmet (1999) demonstrate the importance of segmenting markets,

and with this, attracting resources in a more efficient and easier way.

Arnold and Tapp (2003); Martinez (2003); Arnett; German and Hunt (2003); Varadarajan and Menon (1988); Sargeant (1999b); Romney-Alexander (2002); Andreasen (1996); Nichols (2004); Abdy and Barclay (2001); Sargeant and Lee (2002); Sargeant (2001); Fisher (2005) found similar results in their research regarding relationship marketing and the formation of fundraising partnerships/alliances. This comes to reinforce the importance of this element of marketing for third sector organizations and the continuity of their projects, seeing as the number of competitors searching for external resources grows daily.

Various strategies are necessary in order to collect the intended resources and established projects can be made viable. Some authors (PETTIE, 2002; MARTINEZ, 2003; SHELLEY and POLONSKY, 2002; ARNETT, GERMAN and HUNT, 2003) cite marketing actions that are utilized by organizations that wish to increment their financial budget asking for resources to individuals and legal entities. Therefore, the marketing function must be treated in a special way, once it can cause important differentials when fundraising.

### **3. Methodology**

This research is quantitative, exploratory and descriptive and can be characterized as a survey, performed *ex post facto*. In order to analyze the elements of the marketing function, studied in this research, three variable categories were utilized: (1) Segmentation, (2) Promotion or Communication and (3) Relationship Marketing, taking fundraising into consideration.

Two large groups with similar characteristics were identified. It was understood that approximately fifty percent of foundations had as purpose the educational development and research. These organizations were denominated “educational foundations” and organizations with different causes were named of “non-educational foundations”.

As the main objective was the behavior of promotion, segmentation and relationship marketing in the two studied groups (educational foundations and non-educational foundations) analyzed in relation to fundraising, it was selected to be used a multivariate statistical analysis.

Perreault Junior, Behrman and Armstrong (1979) performed researches having discriminating analysis as a method, where groups with different characteristics were separated, aiming at finding peculiarities that could define them as belonging to this or that group. The object of this analysis is to allocate an individual in one of the studied groups based on its measurement (HAIR, Jr. *et al*, 2005).

Some alterations became necessary in the present study, seeing as Classic Discriminating Analysis is specific for quantitative and this work's data are qualitative, because the Likert scale, with five points for identification of respondent qualities and preferences, was utilized. It was applied a derivative method known as Qualitative Discriminating – QUALDISC. For such effect, the qualitative data were processed by the corresponding multiple Analysis and, afterwards, retained the factorial score of this application in order to develop, with this new base already transformed into quantitative data; the final discriminating analysis and the end linear equation.

All 113 foundations that were registered were researched. Consequently, the performance of a census research was chosen, in other words, the entire existent population of the organizations. Of these 113 foundations, 64 were foundations with educational characteristics and 49 had non-educational characteristics. The chosen criterion in researching the organizations was given by the fact that they were located in the same region and had data together with a governmental control agency. The questionnaires were sent by e-mail. Two phone calls for each organization were made reinforcing the importance of the research for

the development of the work. Eight organizations, four being in each group, were also pre-tested, in the need to obtain semantic validations and judgment.

The variable dependent “fundraising” was utilized as a base to differentiate the behavior of the two variable independents. Higgins and Lauzon (2003), Sargeant (2001), Murphy, T. (2000), Kingston and Bolton (2004), Tyminski (1995), Wayson (1998), O’Heffernan (2000), Nichols (2004), Stephens (2004) and Sargeant (1999b) reinforce the importance of fundraising and the use of marketing activities to increase the sum received by third sector organizations. Consequently, this variable was chosen in order to obtain more precise data regarding the previously mentioned tools and the differences in each group of researched foundations.

The questionnaire applied during the research was prepared with the help from the bibliography regarding the subject and classified in the following way: part 1 – profile of researched organizations; part 2 – communication means, financing sources, and the establishment of partnerships; part 3 – promotion in the third sector organizations; part 4 – segmentation as a fundraising strategy; and part 5 – relationship marketing in the third sector organizations.

This research utilized the statistical application Statistica, which works with the concepts discriminate analysis (DA) application for variable qualitative. From the original data the application internally produced a complete disjunctive matrix and, then, applied in a corresponding multiple analysis (CMA). The coordinates of the respondents above the factorial axes, generated in the corresponding analysis formed the new data matrix to be discriminated.

#### **4. Results**

From the 113 foundations selected, 41 decided to participate from the research completing the questionnaire. Of these 41 foundations, 21 were considered educational (also named “e”) and 20 non-educational (also named “ne”). Of the 20, only two defined themselves as being exclusively returned to culture and recreation, the rest (18) checked more than one option. This produced greater disparity of answers in relation to the non-educational foundations, since all the foundations classified as educational only responded to the education option and research as being its area of operation.

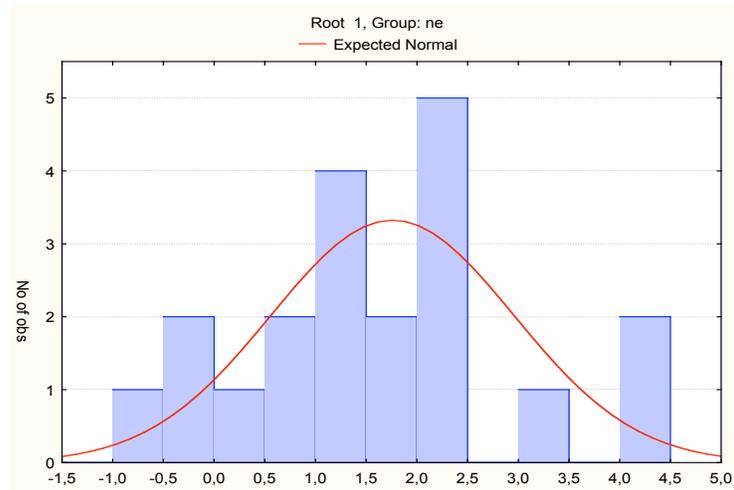
Such fact brought reflection to the respect of difficulty in managing and even fundraising. As a result of not being well defined, many projects don't secure financing, becoming necessary to re think the organization's objectives in order to increase focus in the area of operation. The item of the questionnaire linked to foundations' financing sources required that these answers which the percentage that better represented the composition of financial resources sources in 2004. This question also was prejudiced, seeing that the majority did not present these data. An average composition of financing sources between the researched foundations was established. In this part, there were answers from 41 organizations. However, in the following question that questioned regarding the sum of resources utilized in 2004 only 22 gave response.

It can be perceived that the greater origin of resources is as a consequence of own revenue. As 21 foundations belong to the educational group, one of the reasons for this to happen must be the fact that these resources are obtained through monthly payments of offered courses; already the government comes in second place. In this case, the great part of educational foundations affirmed the redemption of resources arising from government, beyond the non-educational foundations, that receive a lot of support from this agency also. Further sources are related to two foundations, some in greater scale and others less. Private

business and individual donations appear more in the non-educational group. A difference is perceived in relation to the research performed by Andrade (2002), that in its study, it researched assistance organizations; that depend much more on private business and individual donations. Results show that the majority of resources sources came from private business (43.32%), followed by individuals with 33.28%. This demonstrates a significant difference in the origin of resources between these types of organization and foundations studied here, seeing that their greatest resources sources are their own and government revenues.

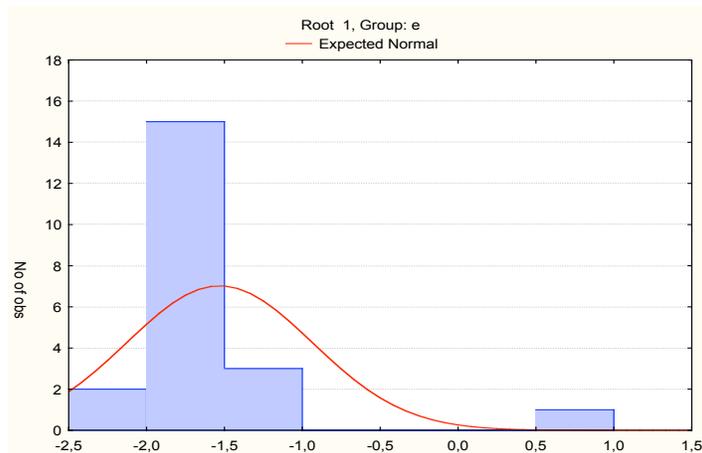
In the case of the present research, to transform the semantic data into quantitative it was necessary to produce a complete disjunctive matrix from the tables with each of the foundations' answers. After making this transformation, the data is processed by the corresponding analysis (CA), which uses information from a qualitative data matrix of "n" lines or observations by "p" columns (the sum of the modalities of all variables). The object was to synthesize the information contained in this matrix, namely identifying relational order between the variables and the possible data redundancies. In an indirect way it was intended to reduce the dimensionality of space in which individuals and ownership are projected, losing the minimum data loss.

The Graphs 1, below, shows the promotion/communication in the non-educational foundations group ("ne").



**Graph 1** - Discriminating function for the non-educational foundations group (“ne”) in relation to promotion/communication

Analyzing only the promotion, it is understood that three foundations were badly classified, in view of that the vertical part is quantity of foundations and in the horizontal the discriminating function value. Also checking that the normal curve presents perfect symmetry. The centroid, in this case, is located close to +2.0. These three foundations observed as badly classified use promotion as a foundation pertaining to the educational group. The following notes graph 2 for the educational foundations group (“e”):

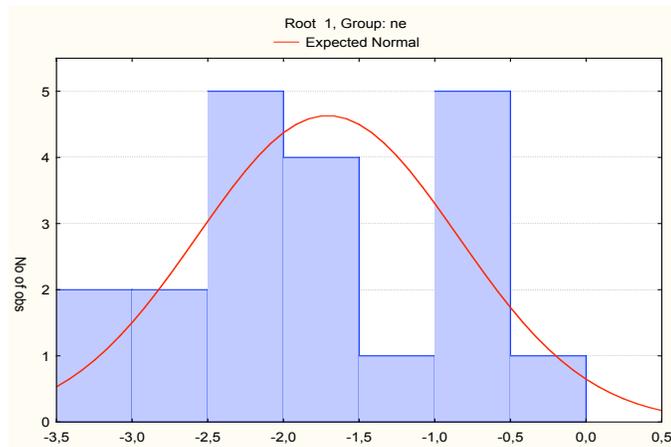


**Graph 2** - Discriminating function for the educational foundations group (“e”) in relation to promotion/communication

In this case, only one foundation was badly classified, when promotion/communication is taken into consideration. The centroid is close -1.5 and the

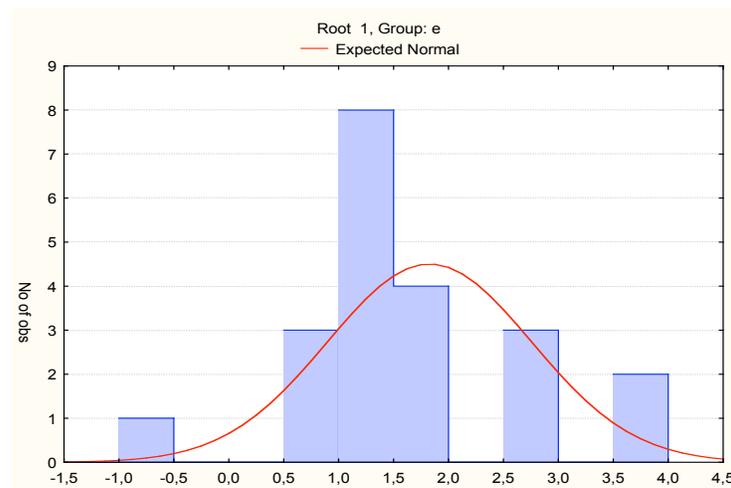
normal curve also presents symmetry. This observation leads us to believe that the foundation works promotion actions as if it were a “ne”.

Graphs 3 and 4, relate to the segmentation in the non-educational foundations group (“ne”) and educational foundations (“e”) researched are presented accordingly.



**Graph 3** - Discriminating function for non-educational foundations in relation to segmentation

Analyzing segmentation only, it is understood that the discriminating function value remains negative and not one foundation is classified incorrectly, allowing the conclusion that they all segment their publics in a similar way. The centroid, in this case, is located close to -2,0 and the normal curve presents perfect symmetry. The following notes graph 4 for the educational foundations group (“e”):

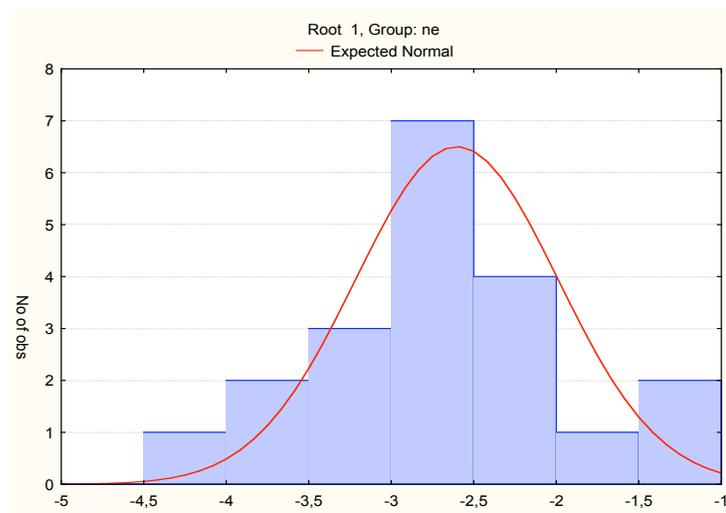


**Graph 4** - Discriminating function for educational foundations (“e”) in relation to segmentation

To check the segmentation, the discriminating function assumed a positive value and only one remained badly classified. The centroid is close to +1.5 and the normal curve also presents symmetry. This observation leads us to believe that the foundation works segmentation actions as if it were a “ne”. It is understood that the same foundation that presented previously classified problems, demonstrated failings in the development of their actions, as much as promotion/communication as of segmentation, seeing that all posterior analyses to calculate the discriminating function, which presented as badly classified.

After performing the discriminating function calculation, differences caused by two results were seen. When corresponding analysis and posterior discriminate analysis is had reliability of results increases, therefore it identifies the variables with bigger differences between the groups and determines a discriminate coefficient that considers each variable in order to reflect these differences, enabling the maximum possible separation between them.

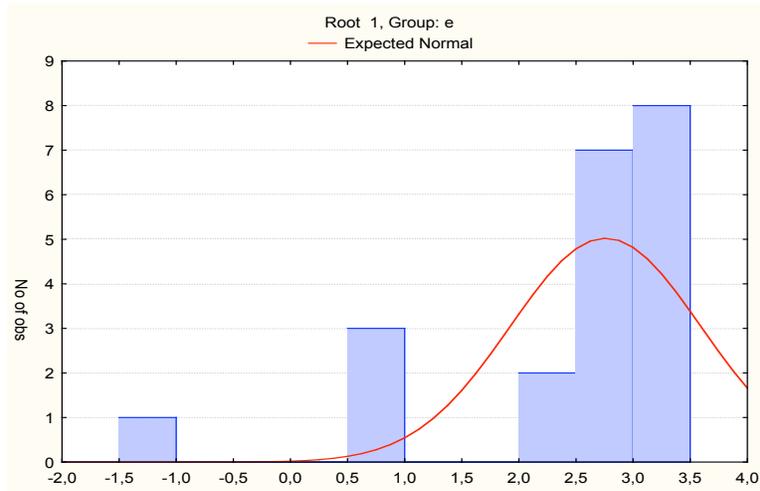
The following Graphs 5 and 6 present the correspondents to relationship marketing in two researched groups (“ne”) and (“e”):



**Graph 5** - Discriminating function for non-educational foundations group (“ne”) in relation to relationship marketing

Checking relationship marketing only, it is understood that the discriminating function value remains negative and not one foundation is classified incorrectly, allowing the

conclusion that they work their relational exchanges and the establishment of alliances in a similar way. The centroid, in this case, is located close to  $-2.5$  and the normal curve presents perfect symmetry. The following notes graph 6 for the educational foundations group (“e”):



**Graph 6** - Discriminating function for educational foundations group (‘e’) in relation to relationship marketing

To check relationship marketing, in Graph 6, the discriminating function assumed a positive value and only one remained badly classified. The centroid is close to  $+3,0$  and the normal curve also presents symmetry. This observation suggests that the referent foundation performs its relationship marketing actions as if it were a "ne".

## 5. Final Considerations

The present research had the objective of checking if the segmentation, relationship marketing and promotion behavior in the two different groups of third sector organizations in Brazil were discriminatorily researched, when taking fundraising into account. A sample of 41 foundations served as the study base.

In relation to the perceptions that brought the discriminate analysis, it can be proved that the majority of researches of both groups tended to develop marketing elements in the

study in a similar way. A foundation is denominated itself as being educational, however all discriminating function were framed as being badly classified.

The found results don't allow the inference that the behavior of the marketing elements is discriminatory between the educational and non-educational foundations.

These analyses were performed as a result of this article, demonstrating the many foundations still do not observe market actions described here as they should, leaving their teams ill prepared. Another interesting note was the relation to the raised sums. The majority of foundations didn't answer this item, however those that did present their amounts surprised by such a big amount demonstrated as by lacking fundraising actions. This produced an antagonistic relationship.

Noting the limitations and difficulties encountered in the process of analyzing foundations, it is highlighted that the achieved results served for verification such as the marketing activities in question that are developed. From this study new perspectives deepening researches in other foundations are proven as in other third sector organizations, that are assistance organizations or not.

Therefore, new studies are glimpsed as the following highlights: performance of similar research in these other foundations and other types of third sector organizations, highlighting primarily the pertinent groups and verifying their differences; the comparison between the different types of third sector organizations, the different purposes, utilizing the same method; the deepening of study regarding fundraising and marketing activities through a qualitative research, in order to verify the depth of their dynamics and difficulties.

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