

# FUNDRAISING FORUM™

## Transforming South Africa's social impact sector: thinking small, thinking big

**T**here's never been a better time for the NPO sector in South Africa to make a huge difference. Your first reaction may be "what is he smoking"? But I didn't say there has never been a better time to fundraise. And I didn't say it has never been easier.

"Ja but" you argue "things are tough".

And that's exactly the message I received after two weeks of speaking in South Africa. I heard dozens of fundraisers lament that things were tough . . . with good reasons.

- Triple BBBE is changing and while an advantageous to some, it's a disadvantage to others;
- The economy is stagnant – donors are more reluctant to give;
- There is increased competition in the NGO marketplace;
- Corporate donors are being pressed more than ever before,
- and many NGOs have fallen into a crisis fundraising mode, and to contemplate growth and development seems impossible.

Yes, things were tough with the Covid pandemic. And yes, things got even tougher. But it is in the very times that we need to think big.

If we want to contemplate tough, we need to consider this:

- Consider working in some of the toughest fundraising environments in the world
- Consider working in former communist countries where civil society was destroyed
- Consider working in an environment where public trust has all but been destroyed, decimated, and where the fight to rebuild civil society is only 20 years old
- Consider working in environments where countries used to bask in the generosity of foreign dollars, but those countries are no longer designated as "developing countries". (Does that sound familiar). So foreign dollars are no longer as plentiful.

So, what's the answer?

At the end of the day, we must become

masters of our own destiny. We're called to the most honourable and important work known to the NGO sector. We are called to support those in need. We are called to support those who are unable to support themselves. What more honourable profession is there, than to be a change-maker and to create a better world, one person at a time?

Nobody ever said to us as fundraisers, I want you to think small. I've never met a funder who said go forth, think small, and just get a little bit.

It is big ideas that attract big money. It is small ideas, that attract small money. During my time in South Africa, so many reinforced the notion that the country was in transformation – it was changing – and it was transforming – and the NGO sector was in many ways, leading that change.

### Think big

Transformative ideas attract transformative gifts. If we think big, we attract big gifts. If we think small, we attract small gifts.

At a time when South Africa is engaged in the transformation of a country and society, there's never been a better time to design transformational giving opportunities. Big ideas attract big money. Transformational ideas attract transformational gifts.

We have two options. We can view the world as one of abundance or we can choose to view the world as one of scarcity. If we see a world of scarcity, we will attract scarcity. If we see a world of abundance, we will attract abundance.

I believe there may never be a better time for the NPO sector in South Africa to think big, and to pursue its vision for a better future for all.

*Tony Myers is a fundraising consultant based in Canada who has more than 25 years of fundraising experience working on five continents around the world for NGOs big and small. In August 2019 he last travelled to South Africa with the Resource Alliance to present the Major Donor Masterclass Series for leading thinkers and practitioners in the NGO sector in South Africa. Contact: Tony@MyersCan.com*

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# Use the hierarchy of fundraising asks

*For every prospect you have at your organisation, you should be prepared to approach them with different asks, after you have properly cultivated them.*

**H**ere is a complete hierarchy of asks that you should be making at your organisation, in the order they should be asked. Not every ask will fit into your non-profit's development strategy, but that's O.K.

In general, though, this is the order that you should be using as you approach your donors. In between each ask, of course, you should leave a sufficient amount of time for thanks, recognition, and stewardship:

## 1 – Asking for a gift

The first and simplest ask you should make is to ask for a monetary gift for your organisation. This is the donor's opportunity to invest financially in your work.

## 2 – Asking for referrals

The second ask you should be making of your donors is to ask them for referrals. This means opening up their address book to introduce you to people who might be interested in the work of your non-profit.

## 3 – Asking for an upgrade/recurring gift

The third ask you should be making of your donors is to ask them to either upgrade (by giving more this year than they did last year) or to make a commitment to monthly giving or another type of recurring gift. If you ask your donor for an upgrade and they say no, then try to get them to at least renew their gift by giving the same amount again this year.

This is an ask you should be making of your donor every year. This ask should be made whether or not your donor agrees to make referrals.

## 4 – Asking for a planned gift

A fourth ask that you should be making is asking your donors to make a planned gift to your non-profit by remembering your organisation in their Will (or through another planned giving vehicle, depending on how advanced your development process is).

This ask should only be made to donors who have demonstrated strong support for your non-profit through a multi-year series of gifts or pledges to your organisation.

## 5 – Asking for a leadership gift for a campaign

Another advanced ask you can make of your donors is to ask them to make a large leadership gift to a fundraising campaign at your organisation. This type of ask should only be made to donors who have demonstrated strong support for your non-profit by a series of gifts, and who have the financial capacity to make a large gift.

Is your non-profit using the entire

hierarchy of fundraising asks as part of your individual giving programme? If not, now is the time to start thinking through your current donors and prospects to see how you can make these types of asks in a systematic way.

For example, many non-profits will find and cultivate prospects and then, when the time is right, ask for a gift. Then, they set a goal of asking for referrals approximately 4-6 months after the donor makes the gift. They also set a process in place of asking for upgrades every year and new referrals every other year, and set up a meeting to solicit a planned gift after the donor makes his or her 4th gift to the organisation.

The process looks different for every non-profit, and depends on the size of your staff and fundraising budget and the sophistication of your development programme. The important thing is that you think through this hierarchy and see how you can be making different kinds of asks at your organisation.

## Tactical asks

Of course, as part of your fundraising plan, you will also have lots of "tactical asks". These are asks that are made through mass-communication or as part of an individual fundraising tactic, such as asking for an event sponsorship or selling tickets to an event, mailing out your direct mail appeals, sending out an e-mail solicitation to your list, etc.

These tactical asks should be made in addition to the asks spelled out above. Thus, you should still be making an upgrade ask each year to your current donors, even if those donors will also be getting an invitation to your annual gala and a letter about your annual fundraising appeal. Be mindful of the timing of your asks, but remember that just because someone sponsors your event this year it doesn't mean you shouldn't be asking them for a planned giving commitment as well.

## Build a monthly giving programme

Monthly giving programmes allow your organisation to collect a certain amount from your donors' credit cards or bank accounts every month to support your work.

With these programmes, your donors preauthorise your non-profit to withdraw a gift every month, and your non-profit reaps the rewards of having a stable base of recurring income that comes in every single month, without you having to make calls or send out reminder letters.

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### On-target observations in brief

It's important to impress donors because they talk, and they talk to one another.

#### The NonProfit Times

Acquiring new members or donors is one of the biggest challenges in the fundraising world – and typically the most costly. The second most difficult task may very well be getting these new supporters to renew their commitment for a second year.

**Mal Warwick**

To improve performance, non-profits should pick out key pieces of data from each of their departments and review them regularly at staff meetings. Looking at important data regularly helps organisations stop making decisions based on hunches and identify potential problems early.

#### The Chronicle of Philanthropy

Don't rush out and do surveys without ensuring you can follow them up, record the results and actually use the data in communications with donors.

**Sean Triner**

In donor communications, untrained opinions are not only worthless, they're dangerous to your non-profit's bottom line. In a professionally run operation, the chief fundraiser will have full, autonomous control over all donor communications.

**Tom Ahern**

Speak from the heart. Sometimes, a sincere message that gets to the point is more convincing than any other approach. Write your letter as though you were having a conversation with someone.

#### Successful Fundraising

Make building and maintaining good relationships with donors a greater priority than asking for money. First gauge a potential donor's interests, and when it's clear that the interests of the donor and the charity overlap, don't be timid about asking for support.

#### The Chronicle of Philanthropy



## A haven of love and care

**H**elderberg Hospice, founded in 1986, was one of the early hospices established in South Africa. This service to care for terminally ill patients has grown and developed in response to the needs of the Helderberg community.

Today it offers a comprehensive palliative care service for persons living with life-threatening illnesses such as cancer, end stage organ failure, degenerative neurological disorders and HIV/AIDS.

Palliative care is an approach which focuses on improving the quality of life of patients through the prevention and relief of suffering, by means of early identification, impeccable assessment and treatment of pain and other problems, and by

providing the emotional, physical, psychosocial and spiritual support the patient and their family may require.

Helderberg Hospice aims to provide support and care for patients and their loved ones at a time when it's most needed. With a long track record, competence, and highly qualified Palliative Care Nursing Consultants, and Palliative Care Social Work Consultants working with the back-up of a 24 hour Palliative Care Support Centre, the hospice staff are well qualified to be called Palliative Care Specialists.

Services offered by the hospice include home based care, a Palliative Care Support Centre, psycho-social support, bereavement counselling and a day hospice.

For more details visit [www.helderberghospice.org.za](http://www.helderberghospice.org.za)

## FUNDRAISING FORUM™

**F**undraising Forum is a regular newsletter dedicated to the enhancement of management, fundraising techniques and the promotion of community service, welfare and non-profit organisations of all kinds.

It is published by Downes Murray International and circulated, free of charge, to anyone with an interest in the growth and improvement of the non-profit sector and those served by it. In addition to regular features written by Downes Murray International staff, there are extracts from international fundraising publications which are reprinted with acknowledgement to the publishers.

We welcome submissions for publication from all writers involved in non-profit work. Visit [www.dmi.co.za](http://www.dmi.co.za) for more information.

# How to master the soft skills of fundraising

*Once you learn how to pick up on social cues, decipher body language and better understand your audience your messaging will be stronger than ever. Stephanie Dotto explains.*

**To get ahead in fundraising you need to have the right tools – but how can you be sure you’ve got what it takes to be a truly successful fundraiser? Your skills are your most important currency in the workplace and you spend years developing proficiencies that can propel you forward in your career.**

But we often overlook that softer side of fundraising that is necessary for building great relationships and instilling long-lasting trust with our donors.

Sure, having impeccable writing skills and a killer sense of organisation can get you far in your career. But if you don’t have the right soft skills you’ll miss important cues that could have drawn more money in for your cause.

Not sure how to bulk up your people skills? Here are a few sure-fire ways to strengthen your soft skills for better fundraising results.

## **Develop your social awareness**

Even though we live in a golden age of technology, with more connectivity and real-time reporting than ever before, we’re not as connected as we like to think. People exist in social media bubbles, where the news and people they interact with are dictated by algorithms that match their personal interests. That means it’s harder to break into someone’s social ‘safe space’ and to appeal to their altruistic side without seeming too pushy or cash-hungry.

Social awareness gives you the ability to analyse, understand and respond to the needs of others. Examine how people react to your fundraising messaging – if someone responds negatively, reach out and start a conversation to see how you can educate them further and get them on your side. This reminds your audience that you’re not just an automated message on their social feed – you’re a human with a strong connection to the cause and a passion to make a difference.

When dealing with donors face-to-face, keep a close eye the way your body language may come across. Less than ten per cent of communication is actually verbal – that means body language and eye contact can go a long way in establishing an immediate rapport and making your donors feel special.

## **Learn to flex your critical thinking skills**

It’s safe to say that fundraising isn’t always a science. Although we have a breadth of tools that provide us a closer look into who our key donor demographics are, we need to consider the social and political trends that may impact the way people view our fundraising campaigns. What things are happening in the world that

may affect someone’s desire to do good? And what sort of messaging may be interpreted as ignorant and offensive? The worst thing you can do is say something the wrong way and alienate your donors.

The better you are at viewing your audience through a critical lens, the more in tune your fundraising efforts will be with the people you’re trying to reach. Ask yourself obvious questions and consider all the perspectives. And don’t be afraid to adapt your messaging if your gut says things aren’t going according to plan. In fact, an effective fundraiser is one who is quick on her feet and can change course at the drop of a hat.

## **Apply active listening skills**

We hear what people are saying, but how often are we truly listening? Communication is more than just appealing to donors and providing biscuit-cutter answers to the questions we get time and time again. The more actively we listen to our donors, the more we understand the way they think and can tailor our messaging to them. Make your ears your secret weapon. Ask follow-up questions and provide feedback. It’s the easiest way to build trust and long-lasting relationships with your audience.

The information we gain from actively listening to our supporters enhances our ability to motivate and inspire them to get involved in the cause. Remember, it’s about them, not you. Active listening enables us to ask the right questions. It gives us a deeper insight into how they feel about the issues and even allows us to step into their shoes and see things from their point of view.

“Beyond the spoken words, there’s invaluable information to be deciphered through tone of voice, body language and what isn’t said. In other words, failing to keep your ears (and eyes) open could leave you out of the game.” – Dr. Travis Bradberry, co-author of Emotional Intelligence (TalentSmart, Inc).

Once you learn how to pick up on social cues, decipher body language and better understand your audience your messaging will be stronger than ever. Especially when dealing with online audiences – you don’t want to find out that something could be interpreted negatively after you’ve already pushed it live. Remember to apply empathy in every situation and don’t forget that your donors are driven by diverse motivations and all have different lifestyles.

This content was provided by CharityJob, the largest and most specialised job board for the charity and non-profit sector in the UK.

[www.charityjob.co.uk](http://www.charityjob.co.uk)

# Who needs a fundraising consultant?

**The ideal client/consultancy relationship is a partnership. An arrangement where the consulting staff develop a sense of 'ownership' in the non-profit organisation and work together towards agreed goals.**

These goals are usually defined in two ways – fundraising programme growth and income budgets. Programme growth targets often consist of a defined number of new donors on the database, or the implementation of a properly planned major gifts component, or the introduction of a new programme. Financial budgets are usually measured in additional net income which can often be achieved by investing more rather than less money in fundraising.

Too often there is a misconception within non-profit organisations that the consultant whom they see on a day-to-day basis is the only person involved in their campaign.

Nothing could be further from the truth – especially in a direct mail fundraising programme. Within the consultancy, a team of at least four people (the Account director, media director, copywriter and creative director) meet to discuss and plan strategies for the coming year.

Once the creative brief is decided and the number and nature of mailings agreed, the next step is the selection and negotiation of rented mailings lists. This too requires a specialist knowledge and often a long-standing relationship with list brokers and list owners.

A timing schedule is drawn up to ensure that each mailing is produced and posted on time, because one of the great dangers of a badly planned programme is that one mailing arrives almost on top of another.

After the mailing is over and the responses are in, another person within the consultancy team compiles and analyses statistics – comparing results and preparing the conclusions to increase responses and income in the future. Finally, a team of creative, management and media staff critically examine each mailing package and note ideas for improvements.

Apart from the whole range of skills that go into strategising, designing and providing a successful mail appeal programme there are many other roles which professional counsel can fill. These include:

- Facilitating strategic planning sessions
- Executive recruitment
- Team building
- Fundraising software guidance
- Implementation of thanking and donor recognition programmes
- Feasibility studies to prepare for capital fundraising campaigns

- Advice on improvements and additions to existing development programmes
- Proposal writing and support for corporate, trusts and foundation giving
- Leadership, staff, volunteer and board development and training
- Bequest promotion
- Public relations, marketing and awareness programme guidance

The American Association of Fundraising Counsel lists four main reasons to use outside consultants:

## 1. Productivity

Consultants increase the efficiency and productivity of the organisation by allowing the non-profit staff to concentrate on their true role – that of service delivery.

## 2. Objectivity

Outside Consultants see the organisation more objectively than permanent staff and can often raise concerns and suggest solutions that internal staff may be reluctant to discuss.

## 3. Expertise

Fundraising consultants are expert at working with all kinds of programmes and institutions. As a result they bring many options for the client to consider and can advise on what works and what doesn't.

## 4. Cost control

Most importantly, good fundraising consultants are cost-effective and have a high success rate. As most consultants depend, for future business, upon referrals from satisfied clients, they have every reason to ensure that a client's fundraising programme succeeds.

In conclusion, a good partnership between a non-profit organisation and a fundraising consultant has the following essential ingredients:

- A mutual respect and trust which recognises the knowledge and expertise which exists in both parties.
- Commitment to meeting agreed deadlines both from the consultant and client.
- A sharing of ideas and experiences.
- From the consultant – advice on what is 'hot' and what is not in other parts of the country and the world and an objective assessment of fundraising ideas and propositions which may have been offered to the client by others.
- Regular review meetings where progress is assessed and open, frank discussion ensues on matters of mutual concern which may affect fundraising success.

When these are in place, then your fundraising programme is virtually assured of successful growth and sustainability.

*With acknowledgement to Terry Murray.* ■

*With more and more non-profit charities employing full-time funding development staff – one would think that fundraising consultants would be struggling to find employment. Yet the opposite is true – in South Africa, the USA, UK and Australasia, more organisations than ever before are employing counsel to work alongside their own fundraising team.*

# The power of curiosity in fundraising communications

*Have you ever seen an ad on a website that started, 'Use this one weird trick?' or, have you ever seen a link or an e-mail subject line that said something like, '8 Ways to Do (Something) – #5 is really great!' Do you know why marketers use ads like those? You can bet those ads and subject lines were heavily tested by the companies sending them out, before they shelled out lots of money on the ads. So you know those ads are working. Do you know why? Joe Garecht reports.*

**M**illions of people click on ads because they just can't resist the urge to find out what's behind them. People need to know . . . curiosity is such a powerful motivator that many people who know that the ads are just marketing ploys still click on them, hoping to have that curiosity satisfied.

As non-profit fundraisers, there's a lot we can learn from our for-profit marketing counterparts. One thing is how to harness the power of curiosity to get people's attention.

Most non-profits send out boring communications. When donors see our letters, e-mails and ads, they're not filled with a sense of wonder, excitement, or curiosity. They know you are sending them one of three things: a thank you, a fundraising solicitation, or a news update.

That's why so many of them throw your letters and newsletters out before opening them. And why so many people, even those who support you financially, click 'delete' on the vast majority of your e-mails, before looking inside.

In my experience, many of your donors who do read your e-newsletters and annual reports do so as a favour to your organisation. They read them because they support you and your work, not because they actually want to.

Building curiosity and excitement for donors.

Have you ever seen someone who buys a scratch-off lottery ticket? What's the first thing they want to do? Scratch it off to see if they won!

Even if they stick the ticket in their pocket, you can bet that as soon as they get wherever they are going, they are going to scratch it. Why? Because winning money is a powerful motivator for human curiosity. They're anxious (curious!) to see if they won, and there's only one way to find out . . . by scratching off the ticket.

Imagine if your donors were that excited to rip open your letters and click open your e-mails to see what was inside! How powerful would that be for your organisation? How much would your fundraising increase as a result? What if people couldn't wait to read your fundraising letters, because they were so curious about what your organisation was up to?

You may think it is impossible to make donors that curious about your communications – but have you ever tried? Chances are you haven't. Chances are you have resigned yourself to sending out letters that won't get read and e-mails that won't get clicked. As a result, you're probably making much less of a connection with your donors than you should be, and raising less from them than you could be.

Your goal, as a non-profit fundraiser, is to build 'honest curiosity' into your donor

communications. I say 'honest curiosity' because we have all seen far too many examples of dishonest curiosity-building. Those 'one weird trick' ads border on the dishonest. I guarantee you can get close to 100% of your donors to open your next fundraising letter if you print envelopes that say 'Keep this letter out! There's a real R100 note inside.' But of course, that would be dishonest, because there's no way you could put R100 notes inside the letter.

So, how can you build honest curiosity for your donors? First, you need to build a relationship with your donors that includes an element of excitement and adventure. You need to wrap your donors up into a story that is bigger than themselves, with an inkling of danger and intrigue.

Does your organisation run homeless shelters? No you don't! You fight to save the poor and downtrodden from life on the streets, bolstered by your team of donors and friends.

Does your non-profit build water pumps in Africa? No you don't! You send out emissaries to a far-away land to save children from disease and thirst. And your donors help you do that.

Second, you need to make sure your donors feel like part of your team. In fact, they should think of your organisation as 'our organisation' and 'our team'. When a donor gets a letter from some organisation they donate to, they throw the letter out. When a donor gets a letter from their team, a team that they think about every day, they read it.

Third, you need to set big goals – goals that are so big, you're not sure that you can accomplish them.

When your donors hear that you want to raise the same amount this year as last year, to serve the exact same amount of people, they don't care about your newsletters or updates.

When your donors hear that your team (their team!), which is fighting to save a village in Africa from a drought, is trying to raise enough money to save that village this month, you can be sure that those donors will eagerly click on your e-mail update when it comes out, because they donated R150 to the cause and they want to see if the team was successful in raising the money and saving the village.

Building honest curiosity is not only possible for non-profits; it's essential if you want to get your donors excited and engaged with your communications efforts.

Once you do all three of these things, then you can work on writing better subject lines, better envelope teasers, and better newsletter headlines that make donors curious about what's inside, and eager to open your communications to see what your non-profit is up to.

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# Launching a planned giving programme

**F**or many of us, we never quite get around to launching a planned giving campaign at our charity, even though we talk about it at board meetings and put it on annual 'to-do' lists.

The reason so many non-profits keep putting off planned giving is because it seems like it's complicated. But the truth is, though, that setting up your first planned giving effort can be relatively smooth and painless.

'Planned giving' is the act of making a commitment to give a charitable organisation a major gift, over time or at death, as part of the donor's overall financial and estate planning.

Start with launching a campaign to generate bequests – that is, supporters who agree to leave a portion of their estate to your non-profit. Then, once you have your planned giving campaign gaining momentum, you can investigate all of the other forms of planned giving available to your charity.

Every non-profit should be focused (in part) on finding benefactors to leave them planned gifts because there is no better way to plan for the future growth and strength of your organisation.

Planned gifts are an excellent return for relatively little cost or upfront investment. You can ask for planned gifts on a regular basis without it costing much money or time, and yet reap amazing windfalls for your organisation.

## Step 1: Research

You'll want to make sure you understand (at a basic level) how planned giving works, and what basic Wills look like. If you're going to be focused on bequests, you won't need to do much more research than that. Of course, if you're going to be using more complicated instruments like charitable remainder trusts, you'll need to spend more time doing research. In either case, spending an hour or two with an attorney focused on estate law would also be worth your time.

## Step 2: Write

Once you've gotten a basic understanding of planned gifts, you'll want to write up a short (1-2 pages would be fine) document explaining why people should remember your organisation in their Will, and briefly explaining just how easy it is to do so. You should also provide a contact person at your organisation who will handle calls relating to planned gifts.

## Step 3: Publish

Next, I always suggest non-profits publish the information they developed in Step 2 in several places to make sure

prospects and donors can find it easily.

First, create a planned giving page on your website. Second, create a quick and easy planned giving brochure that you can hand out to prospective donors. Such a leaflet could be a more expensive full-color brochure, or something as cheap and simple as a flyer run off on your copy machine.

## Step 4: Launch

You've done your research, written compelling copy, and published the information to make sure your donors can find it. Now, you're ready to launch your first ever planned giving campaign.

First, go to your board. (Preferably, the board chair should launch this type of campaign at a board meeting, by seeking 100% board participation). Ask your board members to take the lead by remembering your non-profit in their Will.

Next, go to your key donors and supporters, and ask them to make a planned gift to your organisation. This should be treated like any other fundraising ask – and for significant donors, should be done on the phone or in person.

Finally, depending on how often you make direct mail asks of your donor file, consider sending a mailing to your entire donor base asking them to consider remembering your organisation in their Wills.

## Step 5: Recognise

One great way to encourage participation in your planned giving efforts is to recognise your planned giving donors in a Legacy Club or other donor group comprised of everyone who has told you that they have written your non-profit into their Will.

As you approach new planned giving prospects, showing them a list of people who have made planned gifts to your organisation will help them feel as if they are making a wise investment. Likewise, a Legacy Club will allow you to stay in constant contact with your planned givers to ensure that they don't fall off of your radar and move their support to another organisation.

## Step 6: Include

Finally, be sure to include a small note on planned giving in almost everything your non-profit does. Planned giving information should be on your website, included in your newsletters, mentioned on your reply devices ('Tick here to receive information on how to support our organisation through a planned gift'). The more you remind your donors that you are seeking planned gifts, the more likely they will be to make them.

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DMI offers feasibility studies, strategic planning workshops, direct mail fundraising, telephone stewardship, corporate and capital fundraising campaigns, online fundraising and website design, church fundraising and bequest promotion programmes.

In addition, DMI has close links with a number of fundraising consultancies across the globe, and represents DVA Navion International Consultancy in Africa, enabling DMI to keep a finger on the pulse of international trends and techniques. For more information, contact us:

**PO Box 394**

**Gillitts**

**3603**

**Tel. 031 584 5000**

**Website**

**www.dmi.co.za**

**E-mail**

**info@dmi.co.za**

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