21 YEARS
1987-2008

FUNDRAISING FORUM

Number 81 September 2008

Published by Downes Murray International

Harnessing the Internet

Despite the hype about the Internet's big fundraising success stories, relatively few donors have given online, writes Mal Warwick.

INSIDE INFORMATION

Partnerships in fundraising 2
Philanthropy in focus 3
Make your million-Rand goal ... 4
Measuring the health of your donor file 5
Approaching businesses 7
Does your non-profit appeal to the wealthy? 8

Get out your pencil and notebook now. It's time for a quiz.

Question: Which one of the following statements is true?

- The most important thing for raising money online is the capacity to accept donations on your website.
- E-mail costs so much less than direct mail that it is rapidly replacing it as a fundraising medium of choice.
- Non-profit organisations in the United States are raising more than 10% of their revenue online, and that proportion is expected to rise to 50% by 2013.
- The way to raise money online is to take your direct mail letters and send them out by e-mail to all your donors.
- Almost everyone in the United States is now online, so it's only a matter of time before non-profits can expect their donor lists to grow exponentially through an influx of younger donors who will join through the World Wide Web.

Careful now – that was a trick question.

Have you got it? You figured out that not one of these answers is true? Go to the head of the class! But if you're unsure about whether these statements reflect current reality, listen up. Fundraising online is a highly promising field, but it's a world in itself, with its own rules, quirks, and culture.

Challenges

If you plunge in blindly, heedless of the idiosyncrasies and challenges of communications online, you may find that fundraising via e-mail and the Internet is anything but cheap.

For starters, here are a few of the things you can (and can't) expect from online fundraising:

E-mail, not the Web, is the key to raising money online. A strong website is absolutely necessary, but it's far from sufficient. If you build it and just let it sit there, they won't come.

Online fundraising revenue is growing at an astounding rate – an estimated 35-40% annually – but it's building on a very small base. The most reliable estimates I can find indicate that e-mail and the Web yielded approximately 1% of total philanthropic revenue in the United States in 2006, or a little more than 1% of giving by individual donors. Even if we assume straight-line growth at the rate of 37% per year (which is not a safe assumption), we'll have to wait until 2014 before online fundraising accounts for even 10% of philanthropic giving.

Online fundraising techniques don't work equally well for all non-profit organisations.

Emergencies

Those engaged in emergency humanitarian relief are the biggest beneficiaries – and those organisations with well-known brands, such as the Red Cross, the Salvation Army, and UNICEF, are the biggest of all. Prominent advocacy organisations such as Amnesty International and the Human Rights Campaign have also gained in major ways from the Internet, largely because they deal in hot-button issues that dominate the headlines. (The issues that have attracted the most attention are personal and civil liberties, environmental protection, and human rights.) High-profile political campaigns – with Barack Obama's extraordinary success the standard-setter here – have benefited, too.

Although organisations in other fields have sometimes managed to build significant online donor files, they tend to be the exception, not the rule. Not yet, anyway.

Despite the hype about the Internet's big fundraising success stories, relatively few donors have given online.

However, those who do make contributions online give significantly more money on average than do direct mail donors – frequently twice as much. Online gifts of $100 or more are common.

The Internet's competitive advantage against all other media is speed. In your direct mail fundraising programme, you may allow months to elapse between conception and the mailbox.

That would lead to utter failure online. It's no accident that the most successful online fundraisers are disaster relief agencies, advocacy organisations, and political campaigns – because all of them rise or fall with breaking news. To make the Internet

Continued on page 6

Partnerships in fundraising

Terry A. Murray is former chairman of Downes Murray International and recently retired president of DVA Navion South Africa.

Successful partnerships have one major thing in common – they benefit both partners. Let's look at five of the most important partnership opportunities in what I believe is the reverse order of importance:

5. Partnerships with other non-profit organisations

By combining with others to organise a special event like a fun run or charitable auction – you gain a number of benefits:

- You share the organisational load which falls on your staff.
- You're likely to raise more money and even greater publicity.
- You can attract new donors (although it is usually better to partner with an organisation which works in a different sector from your own).
- Then you can partner with other non-competing NPOs to exchange sections of your donor file. Reciprocal list exchanges can be hugely successful for both organisations.
- Combine with other NPOs to fund research which will benefit all of you.
- Combine with one or more other NPO's not in direct competition with you to share premises and overheads.

4. Partnerships with the corporate sector

Corporate giving has moved away from corporate social responsibility or 'handouts', to 'What's in it for us?'. They also want to be seen as being unique or making a unique difference. So first research their objectives in partnering with NPOs and then ask, 'What can we do for you that would encourage you to support us financially?' Then don't neglect the regular communication and feedback they deserve.

> **"... you need to fulfil your side of the partnership by telling them what you are doing towards ensuring that you will one day have the answer to all of their hopes and wishes ..."**

Here are some examples:

Cause-related marketing (CRM)

This is in fact a marketing tool for the company which uses your charity to encourage consumers to buy more goods. It's a long-term partnership which requires a good 'fit' between your organisation and the product or company and is easily measured in terms of additional consumer sales or brand recognition.

Affinity programmes

Possibly one of the best known is the Nedbank Green Trust, Sports Trust and Arts and Culture Trust. A simple arrangement allows Nedbank customers to link their current account, cheque account and credit card to one of these trusts and a percentage of each transaction goes towards the trusts.

Payroll giving

An old opportunity but still a valid one especially with the new tax benefits that are now available. You can encourage companies to get their employees to match the company's donations or you can do it the other way around and ask them to let you present your case for support to their employees.

In kind donations

Blankets, food, clothing, computers, office equipment and furniture, printing and executive expertise. List all your suppliers and see what you can negotiate with them in return for having their logo alongside yours in publications or giving them publicity.

Sponsorships

Many companies are willing to sponsor events, printed publications and other expenses provided that you can find the right 'fit' between the company and the item to be sponsored.

3. Partnerships with a fundraising consultancy

If you're looking to grow your donor base, increase your fundraising income and give yourself the time to concentrate on your core business – then a partnership with a fundraising consultancy can often provide the answer to all of this. To be successful it depends on two key factors: mutual trust and respect.

Some of DMI's successful partnerships have lasted for 20 years and more. And these organisations have grown to become some of the largest and most successful NPOs in the country with local and overseas donor bases exceeding most others in South Africa.

2. Partnerships with your volunteers

This is one of the most important partnerships but also one of the most neglected. In the USA some 26% of the population volunteer their time and in the UK the figure is about 39%.

We don't come anywhere close to these figures here in South Africa for two reasons: we have not developed a culture of volunteering, and we don't provide sufficient encouragement and support for those who do volunteer. So make your volunteers feel part of the team.

Then there are your board members – arguably the most important volunteers that you have. But how do we treat them? Do we:

- Provide them with a written job description that includes the fact that they are also expected to contribute financially to the best of their ability as an example to others?
- Give them a thorough orientation of the facilities and the work of the organisation?
- Explain that we would like them to advance our organisation and our cause to their influential friends and colleagues?

Continued on page 6

Milestone Thinking

On-target observations in brief

I have found that among its other benefits, giving liberates the soul of the giver.
Maya Angelou

Ask. Ask directly and ask often. Because when it comes to direct mail fundraising, is that too much to ask?
With acknowledgement to
Deborah Block and Paul Karps
Mal Warwick's Newsletter
August 2008

It's time to figure out how to best serve the constituents of organisations by giving them what they care about – compelling information, relevant content, and the opportunity to feel and experience something deeply.
The NonProfit Times
June 15, 2008

Idealists . . . foolish enough to throw caution to the winds . . . have advanced mankind and have enriched the world.
Emma Goldman
1869-1940

After securing a gift commitment, don't leave the donor's home or office without knowing how it will happen.
Reprinted with acknowledgement to
Successful Fund Raising
May 2008
Volume XVI, No V

Asking people to volunteer their time at a charity before asking for their money increases the amount they ultimately give to the organisation, a new study has found.
Reprinted with acknowledgement to
The Chronicle of Philanthropy
June 12, 2008

There's an old economics theory that the way to survive an economic downturn is to sell your way out of it. In the case of charities, it's investing in finding people who have not yet been asked to the dance.
With acknowledgement to
The NonProfit Times
July 1, 2008

Photo: Adrian Baillie-Stewart, PhotoCreative

Weaving a barrier against violence

Currently, two of the young men who were convicted of Amy Biehl's murder and granted amnesty, work for the Amy Biehl Foundation to make these programmes a success.

They're a living embodiment of values, such as forgiveness, reconciliation and tolerance which they strive to teach the youth.

The Amy Biehl Foundation aims to develop and empower township youth and contribute to community building efforts, in a bid to reduce the levels of crime and violence in these areas and to give these children a brighter future.

The foundation's programmes currently reach more than 1 000 children every week, and include after-school care, sports – including soccer, hockey, swimming, surfing and the first and only golf driving range in a township, music, HIV/Aids peer education, greening and environmental issues, creative arts and beading and youth reading role models.

These programmes focus on the creative side of the children's brains, and supplement the shortcomings of the educational systems. Providing these students with meaningful opportunities helps to grow the economy, as the next generation will be better equipped to deal with the challenges of tomorrow.

Visit www.amybiehl.co.za

(Readers are invited to submit photographs, together with a brief overview of their organisation's work, for inclusion in this regular feature.) ■

The Amy Biehl Foundation was founded in 1997 with its mission to 'Weave a Barrier Against Violence' by emphasising social, cultural and economic empowerment through its programmes.

FUNDRAISING FORUM

Fundraising Forum is a regular newsletter dedicated to the enhancement of management, fundraising techniques and the promotion of community service, welfare and not-for-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 not-for-profit work.

Visit *www.dmi.co.za*

How to make your million-Rand goal

P.S. All fundraisers: Read this even if you aren't engaged in a capital campaign. Why? Because the fundraising industry has a big *problem, writes Tom Ahern.*

Adapted from
Ahern E-News 5.9
www.aherncomm.com

Approval of fundraising communications is often ceded to those least qualified: people at the top of the organisational chart.

I write case statements for part of my income. I teach how to write case statements for another part.

And for the unmatched excitement of receiving a small royalty cheque every quarter, I've even written a book about case statements (out in November from Emerson & Church).

I don't guess at any of it. I don't dare: there's too much at stake. I've read every major text book on capital campaigns.

I work as a contract case writer for one of America's leading capital campaign consulting firms.

And I seek out and interview top solicitors at hospitals and universities, people who commonly raise millions. Why? Because these are the people who actually use case statements. As a writer of same, I need to know how.

To repeat: I taught case-writing, more than a dozen times this past year alone.

Jargon

And here's the lament that arises at every workshop, without exception, without fail: 'Well, that's fine, Tom; and I agree with you. But my dean/president/boss will never approve. He/she thinks more verbiage is better; and that jargon and lofty language are the best.'

Look, we all know what we know. But sometimes people in unassailable positions (think tenured) fall into an eerie intellectual trance.

They start to assume they know everything; and that what they don't know, they can easily guess at, using the mighty instrument of a big brain stamped Ph.D.

Common human failing? Absolutely. Tolerable human failing in a capital campaign attempting to raise millions? Please.

A case statement is a sales document.

As a sales document, its success depends on many things: an understanding of applied psychology, eye-motion studies, best practices in advertising, journalistic training. To name just the cream.

A case for support speaks to generalists, not specialists. Consider. The University of Toronto's $1 billion campaign convinced more than 112 000 individuals to make gifts. About half were first-time donors.

Altogether, a vast throng. Virtually none were specialists in any academic sense.

Jargon-riddled, lofty-leaning, and (hence) tedious writing does not impress this crowd. It fatigues this crowd. It frustrates this crowd. It confuses this crowd.

And pity the poor solicitor in a face-to-face solicitation (the font of most cash; 97% of the money is raised from just 3% of the donors, after all) who ends up blurting, 'Look, I know; it's kind of vague. Here's what they're trying to say.'

Competent

Consider this the first commandment for case writing: A competent, professional approval loop for case statements includes *no one* but:

1. Solicitors;
2. their designated writers;
3. and content experts.

Deans can be content experts. Chiefs of staff can be content experts. Content experts check facts. And that's *all* they do.

They do not rewrite for style. They do not put their 'stamp' on anything. That's not their job. And unless they've worked as a copywriter, it is certainly not their expertise.

A case statement is nothing like a grant proposal or a peer-reviewed article, things an academic might have some familiarity with.

Why does this distinction matter? Target audience. A case has to persuade a target audience of generalists, not specialists. Specialists read grant proposals and peer-reviewed articles.

You can reasonably expect specialists to grind their way through every tortured phrase. Call it professional courtesy.

Generalists read case statements. These are your gift prospects. They are volunteers, lending you a few minutes of their valuable time.

Peril

Keep in mind: outside of work, they mostly read for entertainment.

They're used to news articles that give them the whole story in under 50 words. Bore your generalists, confuse them, irritate them at your peril.

Specialists vs. generalists: know the difference ... or else.

Adapted with kind permission from Ahern E-News.

To subscribe or for back issues visit www.aherncomm.com – where you can also rummage through lots of sample non-profit communications and other tidbits.
E-mail: a2bmail@aol.com. ■

Measuring the health of your donor file

To create a successful fundraising strategy, you need to be able to see beyond individual donors' motivations – and be able to quantify the wider trends that are affecting your file's health.

Consider the following two examples, each of which, on the individual level, will result in the same outcome for your programme's performance:

1. Donor A decides to stop giving to your organisation because her husband died.
2. Donor B decides to stop giving to your organisation because she received a more compelling appeal from a similar organisation.

In the first example, the donor's decision will not affect your programme's results other than the loss of that individual's support. In the second example, the donor's decision may reflect a wider trend that could lead to a big decline in your revenue.

By aggregating your data and making decisions based on total donor file trends, rather than granular-level data, you can cut out a lot of the noise of individual decisions that have nothing to do with your organisation or your fundraising strategy.

With that in mind, what are the standard measures of file health that you should monitor, and how do you calculate them? Here are three measures of donor file health:

1. Active donors

I've seen active donors defined in many different ways. Some people feel that a donor who has given a gift within the past three years is an active donor, some say 24 months.

Active donors can be counted on a calendar year or a rolling 12-month basis, but it's most instructive to measure active donors by fiscal year.

You should also count active donors by their type of giving:

New donors: donors who gave their first gift ever in the current fiscal year.

Multi-year donors: donors who gave at least one gift in both the current fiscal year and the prior fiscal year. (You may also want to look at this category by years of consecutive giving, splitting out two-year, three-year, and four-plus-year consecutive donors.)

Reactivated donors: donors who are not new to your file and who did not give in the prior fiscal year, but who did give gifts in the current fiscal year.

2. Retention

Retention measures the percentage of donors who gave in a prior period and again in the current period.

Again, this is most instructively measured using the 12 months of a fiscal year. It can be calculated by taking the pool of active donors in the prior fiscal year and counting how many of them gave at least another gift in the current fiscal year.

For example, if you had 20 000 active donors in the previous fiscal year, and 12 345 gave gifts again in the current fiscal year, your retention percentage would equal: (12 345/20 000) x 100, or 61.7%.

Attrition is the opposite of retention and measures how many donors have stopped giving. Based on the above example, you could calculate attrition by subtracting the retention percentage from 100, which comes to 38.3%. You should measure retention and attrition for your overall pool of donors and along several more refined segments, such as new donors, multi-year donors, and sustainers.

3. Conversion and return on initial acquisition investment

Conversion measures how many first-time donors give a second gift to your organisation. Because new donors are often acquired with an investment, it's important to measure how many convert to long-term giving to your organisation.

Conversion can be tracked by the source the donor came from (e.g. a mailing list, an acquisition project, an event), but can also be tracked on a fiscal year basis, similar to retention. To calculate a fiscal year conversion percentage, you should count the number of new donors acquired in the prior fiscal year and then count how many of them have given at least two gifts by the close of the current year.

So, for example, if you acquired 75 000 new donors in the prior fiscal year, and at the close of the current fiscal year 28 000 of them had given two or more gifts to your organisation, the new donor conversion percentage for the fiscal year would equal: (28 000/75 000) x 100, or 37.3%.

You should also calculate the amount of the initial investment you've recouped from your new donors on a fiscal year basis. Similar to conversion percentage, this can be tracked by counting the total value of the gifts over two fiscal years from new donors acquired in the first of those two fiscal years – and then dividing by the initial acquisition expense needed to acquire those donors. For example, if the 75 000 new donors acquired above required an expense of R2.4m – and, at the close of the current fiscal year, those donors have given a total of R2.55m – the return on initial acquisition investment can be calculated as: (R2.55m/R2.4m) x 100, or 106%.

Of course, it would be best to measure the total return on investment for any given donor, but this requires a very strong database and quite a bit of work to track all of the costs involved in cultivating a donor. As long as your overall programme is netting revenue, return on initial acquisition investment can be a good proxy for assessing the value of donors acquired in different fiscal years or through different acquisition programmes.

Stay tuned: Next issue I'll discuss gifts per donor, revenue per donor, and upgrading, and downgrading.

Peter Schoewe is Senior Consultant, Mal Warwick Associates. Web www.malwarwick.com e-mail peter@malwarwick.com ■

With acknowledgments to Successful Direct Mail, Telephone and Online Fundraising™ *June 2008* *Visit www.malwarwick.com*

Partnerships in fundraising

This article is an edited version of a presentation made by Terry Murray at the recent SAIF AGM in Cape Town, and by Jenni McLeod for SAIF's KwaZulu-Natal branch members.

Continued from page 2

- Ask them to help recruit other well qualified board members?

1. Partnerships with your donors

There is good reason for this being Number One as it is the most important by far in securing and growing your future funding.

And it is relatively easy to get it right. Donors – particularly individual donors – should be seen both as friends and partners.

You should make certain that you reinforce your public image and give them the confidence they seek by reporting on your financial status and the stability of your organisation at least once a year by way of an annual report.

The all-important communication device with your donors is your donor newsletter – with emphasis on donor appreciation, not a deadly dull newsletter that only looks inward and acts as an ego-booster for board members and staff.

You also have an obligation to reinforce the good feeling they get from donating by thanking them using the old 3 P's of thanking:

- Promptly – make sure your thank you letters are sent within 48 hours of receipt of the donation.
- Personally – always use a personally addressed letter.
- Pertinently – reinforce their decision and refer to the aspect of your work that they have chosen to support.

I hope that I've convinced you of the importance of partnerships in fundraising and that you take away from this column at least one new idea. Sometimes it takes just one small prompt to spark a major turnaround in donor retention and ultimately in your fundraising income. ■

Harnessing the Internet

Continued from page 1

work for you as a fundraising tool, you'll need to find some way to introduce a strong sense of urgency into your appeals.

The demographics of Web users reflect a lower median age than that of direct mail respondents. After all, the median direct mail donor for most non-profits tends to be 55 or older, and for some organisations the median age can reach into the seventies.

Younger audience

But the fact that teenagers and twenty-somethings have grown up with the Internet and can often be found in cyberspace at any hour of the day or night doesn't mean that they're now rushing into philanthropy.

Yes, online donors tend to be younger than direct mail donors, typically in their forties and fifties rather than their sixties or seventies. But online communications reach older folks as well as youngsters – and it's the older ones who disproportionately respond to appeals for money.

Decades of research into the habits and expectations of direct mail donors have given us considerable insight into what's likely to work in the mail, and what isn't. (Even so, our best guesses are wrong far too often!) Research into the minds of online donors is, by comparison, in its infancy. At this writing, the Web is celebrating its 15th anniversary, and fundraising online on any meaningful scale dates only to the late 1990s.

Bluntly put, there's a whole lot more that we don't know than that we do know about raising money online.

One thing we know for certain, though: Many of the techniques that work in the mail most assuredly do not work online. There are profound differences in style, format, and approach between the two media.

If your website features brochures and direct mail appeals transposed intact, you've probably already discovered how ineffective they can be.

Oh, one last point: The technical demands of raising money online can be daunting.

Chances are, unless you or a member of your staff is a dyed-in-the-wool geek with a broad knowledge of what works online, you'll find your organisation's performance on the Internet to be limited if you try going it alone.

For starters, you'll need to sign up with an online service provider to manage the technical aspects of maintaining your list, sending out e-mail messages and e-newsletters, and hosting your website.

You're also likely to find it advisable to hire one of the growing number of online fundraising consultants.

Let the consultant keep up with the proliferation of online opportunities on your behalf – and stick to raising money yourself.

This article is excerpted from How to Write Successful Fundraising Letters, Second Edition, *by Mal Warwick (Jossey-Bass, 2008). Copyright © 2008 by Mal Warwick.* ■

Approaching businesses

Unlike foundations, companies are in business to make money, not give it away.

The company's priorities are its customers, shareholders, employees, and bottom line.

So why do companies give money, time, and resources to non-profit organisations?

Most people think companies give to take advantage of the tax break for charitable donations.

But a tax deduction is not the primary motivating factor behind most corporate philanthropy.

Giving can advance a company's business objectives by increasing its visibility in the community with positive attention.

Studies have shown that all else being equal, buyers will choose a product or service from a company that is viewed as socially responsible.

Therefore, some businesses want the 'reflected glory' of associating their names with non-profits.

Companies also give to be good corporate citizens by returning a portion of their profits to the communities in which they do business and where their employees live and work.

Here are a few options to pitch to potential corporate sponsors.

Grants

Corporations provide direct cash grants to non-profits through company-sponsored foundations, direct giving programmes, or both.

Company-sponsored foundations are separate legal entities from the businesses that establish them.

The foundations might have an endowment from which to draw or may be dependent on annual gifts from the company.

Researching a corporate foundation's giving is easier than researching direct corporate giving programmes, which are internal to the company, tied directly to company profits, and have no public disclosure requirement.

In kind support

In kind support might consist of donated products, equipment, services, or space.

Since in kind support could be easier and less expensive for a company to provide than a monetary grant, seeking it might be your first step in building a relationship with a particular business, which may lead ultimately to financial support as well.

Employee involvement

According to Matching Gift Details, more than 7 000 parent companies, divisions, and subsidiaries in the US currently match their employees' gifts to non-profits.

Some companies have formal employee volunteer programmes, for example, providing tutors for a local school or executive staff to non-profits that need expertise in such areas as accounting or public relations. Companies also may make small grants to organisations where their employees volunteer.

'Non-philanthropic' support

Corporate funding can also take the form of sponsorships or cause-related marketing (CRM). The funding comes not from money earmarked for charitable contributions but from another budget, such as marketing.

In the case of sponsorships, a corporation might underwrite an event or programme in return for exposure on a large scale, such as the Olympics, or locally, such as buying a table at your annual ball.

CRM is intended to promote the company's product or service while raising money for the non-profit.

CRM can be as simple as an agreement to donate a percentage of the purchase price for a particular item to a charity, or it can be more complex, such as an affinity credit card or the 'leasing' of a non-profit's logo to promote a product.

In most cases, companies are more likely to be interested in large, well-known non-profits with excellent reputations.

Smaller organisations, however, should not overlook opportunities with smaller companies. For instance, a local supermarket might set aside specific days when a percentage of profits will be donated to a particular organisation.

Tips

When looking to the business community for funding, grantseekers must consider the critical question, 'How do we align the work of our organisation with the philanthropic and business interests of the company?' Strategies to consider include:

- Companies tend to give where they do business, so your first tactic might be to find out who's in your backyard. Research where a company's headquarters, plants, field offices, and subsidiaries are located.
- While exploring your own backyard, don't forget local small businesses. They are a great source for in kind gifts, such as gift vouchers to use as volunteer incentives or products for your silent auction.
- Think about what your organisation has to offer the business. Does your non-profit offer services that could be used by the company's employees?

Could a partnership between your organisation and a specific company help that firm sell more products or reach new customers? For example, if your agency works with children, you could focus on toy companies.

- Know the work affiliations of your donors, board members, and volunteers.

Continued on page 8

Grantseekers need to understand both the motivations behind corporate giving and the options for partnering with corporations to be successful at attracting their support.

Adapted from
The NonProfit Times
June 15, 2008
Visit www.nptimes.com

Does your non-profit appeal to the wealthy?

There's an old adage: 'You need to hang around big dogs to attract big fleas'.

One cannot hope to attract major gifts without having programmes and strategies in place to invite such support.

Implementation of the following strategies will build the case for large gifts:

- Get major donors on your board.
- Build exclusivity into your fundraising events.
- Design a donor upgrading system (e.g. gift clubs with corresponding benefits).
- Get prominent people involved on advisory committees.
- Establish a major gifts rating committee.
- Have a public relations plan in place, then follow it.
- Make your budget understandable to major gift prospects.
- Establish a donor recognition programme.
- Develop a donor cultivation system.
- Conduct an internal audit.
- Involve and engage your constituents in planning.
- Feature prominent individuals in your literature (newsletter, brochures, flyers, etc.).
- Prepare an attractive and compelling case statement.
- Make all printed publications – letterhead, brochures, newsletter, etc. – look like your organisation is worthy of big gifts.

This major gifts checklist is reprinted with acknowledgement to Successful Fund Raising's *Special Report on Major Gifts.*

Visit www.stevonsoninc.com.

Successful Fund Raising *is published 12 times annually.* ■

Approaching businesses

Continued from page 7

If someone affiliated with your organisation is also affiliated with a specific company, that company may give grants where its employees volunteer, match employee contributions, or provide volunteers you could use.

Other considerations

When working with corporate partners, make sure you research the company and clearly understand all of their expectations up front to avoid conflicts with your organisation's programmes and values.

For example, many health-related charities will not accept funding from companies with tobacco interests. You might want to create a gift acceptance policy that outlines the conditions under which you will accept donations.

Your good name and position in the community are important assets to be protected.

Pattie Johnson has been the director of the Foundation Center's regional center in Atlanta since it opened in 1993.

She has worked in academic, public, special, and law libraries and has extensive experience in the non-profit sector. ■

"Reprinted with acknowledgement to ..."

Fundraising Forum prides itself on keeping South African fundraisers right up-to-date with developing attitudes, trends and techniques, both here and overseas. We are grateful to the following international publications, which are regularly quoted and highly recommended:

- *Successful Fund Raising*, PO Box 4528, Sioux City, Iowa, 51104, USA, (12 issues per annum $159) website: www.stevensoninc.com
- *The NonProfit Times*, 190 Tamarack Circle, Skillman, NJ08558, USA, ($129 per annum) website: www.nptimes.com
- *The Chronicle of Philanthropy*, PO Box 1989, Marion, Ohio, 43306, USA, (24 issues – one annum at $95) website: http://philanthropy.com
- *Successful Direct Mail, Telephone and Online Fundraising.* Subscribe for free at www.malwarwick.com/newsletter
- *Ahern E-News.* Subscribe for free at www.AhernComm.com

Fundraising Forum *is edited by Richard Solomon and Terry A. Murray and published by Downes Murray International.*

Downes Murray International

Downes Murray International are fundraising consultants, working with non-profit and non-government organisations of all kinds, to increase their fundraising effectiveness.

We offer feasibility studies, strategic planning workshops, direct mail fundraising, mail/phone, corporate and capital fundraising campaigns, Internet fundraising and website design, church fundraising and bequest promotion programmes. In addition, Downes Murray International has close links with a number of fundraising consultancies across the globe, and represents DVA Navion International Consultancy in Africa, enabling us to keep a finger on the pulse of international trends and techniques. For more information contact your nearest office.

Durban
Tel. 031 207-3755
Johannesburg
Tel. 011 465-7217
Cape Town
Tel. 021 674-0803

Website
www.dmi.co.za

E-mail
fundraisingforum@dmi.co.za

If you would like additional copies of *Fundraising Forum* or would like to add names to our mailing list please write to:

The Editor
Fundraising Forum
PO Box 3455
Durban
4000

e-mail: richard@dmi.co.za