

FUNDRAISING FORUM™

Time for non-profits to invest in their own development

Recently The Resource Alliance (www.resource-alliance.org) undertook a scoping study into the social impact sector in Southern Africa, with a specific emphasis on how organisations are attracting and sustaining the resources necessary for them to deliver on their missions. In this article, Downes Murray International consultant, Sarah Scarth – who is the Resource Alliance’s Southern Africa area representative – shares a summary of the key findings and recommendations with Fundraising Forum.

When we embarked on this scoping project in mid-2014, our aim was to hear from a wide range of voices in Southern Africa, so as to gain a comprehensive understanding of the current funding environment, the challenges and barriers faced by organisations who operate within it and what they most need/want in order to be more successful.

The Resource Alliance works globally to strengthen the social impact sector, by helping organisations of every size and type develop the resources needed to build a better world.

Through our global network we bring together the very best thinking and curate the knowledge, tools and connections most vital to help social impact organisations succeed in delivering on their missions and build a better world.

Through extensive face-to-face interviews conducted with funders, CEOs, fundraisers and consultants and an online survey completed by several hundred people in the region, we gained valuable information.

The following key findings emerged:

- The funding landscape is changing throughout the region and the majority of organisations are finding it harder to find sustainable sources of income;
- The majority of organisations are dependent on grant funding from a few donors and largely as a result of lack of know-how haven’t developed a diversified resource mobilisation strategy. This is seen as a major barrier to achieving financial sustainability;
- Whilst the importance of strong leadership is recognised as directly impacting on an organisation’s success, investment in the development of leaders is very low, largely as a result of a lack of resources;
- In more than half of the organisations surveyed, the fundraising and resource mobilisation responsibility rests solely with the director/CEO, i.e. there is no fundraising person/department, and in most cases this person is expected to deliver results without training and with little support.
- There are funders who recognise the need to invest in organisational capacity building, however too few grantees ask for this investment as part of their



grant funding.

We were encouraged by organisations that are growing and thriving as they find new, innovative ways to mobilise resources, largely as a result of the investment they have made in developing their fundraising capacity and know-how.

Strong organisations were characterised as those who have:

- Invested in fundraising and resource mobilisation (i.e. diversified programme);
- Have strong leadership; and
- Good financial management.

However they are in the minority and the reality is that most are battling to survive and are crying out for help. Weaker organisations were characterised as those with:

- Poor management (most common reason given); and
- A lack of fundraising expertise by leaders, who are expected to automatically know how to build strong organisations and attract and sustain resources.

Recommendations

The value and importance of social impact organisations in Southern Africa is undisputed. However their sustainability is dependent on their ability to invest in their own development (i.e. leadership; fundraising and resource mobilisation skills; financial management) so that they are able to adapt to a changing funding landscape and find innovative and creative ways to generate resources.

Whilst lack of resources was the main reason cited for lack of investment in resource development, money alone is not the issue. We need to shift attitudes around fundraising and resource mobilisation and make it a collective responsibility – one that is embraced by everyone in the organisation from the board down.

For the social impact sector to thrive we have a responsibility to allocate the time and resources to invest in ourselves and share our knowledge and experience with others through networking and peer learning. ■

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Looking at the local culture of giving in Southern Africa

Africa offers a swathe of giving practices based on indigenous giving cultures through to sophisticated strategic philanthropy. We live in fast changing societies and they are often geared to change.

In the African region we do not necessarily find commonalities as each country has different cultures and histories. However, most have a common history of colonialism, poor governance and, for many, on-going aid requirements.

The concept of “Ubuntu” is considered a key value in traditional African culture. It means “I am who I am because of who you are”. This implies an interconnectedness between all people and embraces community.

While many believe that the ideal of Ubuntu has lost its meaning, Ubuntu continues to function. This can be seen in South Africa when Zimbabwean immigrants and refugees combine their meagre resources to ensure that the bodies of the deceased can be shipped back to Zimbabwe for burial, or when the residents of Cape Town come together when fire threatens the city, volunteering their time, contributing water and food as well as financial resources. Ubuntu is still functional and should be encouraged at all levels.

In South Africa we have an emerging new elite – people who are often first time university graduates in their families and who are first generation wealth. There is always the criticism that they should be giving back to society and there are expectations that the public should be seeing grandiose donations. In reality, new wealth has massive demands on it. Individuals are expected to contribute to their extended families and there are significant obligations to their cultural roots. I predict that we are unlikely to see an immediate growth in formalised philanthropy until these obligations have been met.

Africa is a religious continent with various forms of Christianity as well as millions of Muslims. Faith-based giving falls into three categories: propagation of the faith; immediate charitable assistance to those of the same faith; and more extended social development amongst all inhabitants of their countries. Faith based organisations play a significant role in the charitable sector and their contribution is considerable.

Corporate giving has been in effect in South Africa since the 1970s with the disinvestment campaign to encourage foreign companies to leave the country. The Sullivan Codes of

that era outlined the conditions required for companies that chose to remain in South Africa. This included the importance of reinvesting in South African society, particularly to alleviate poverty. This led to a culture of corporate social investment which spread across the business sector and it remains to this day. However, corporate giving has been affected by the Broad Based Black Economic Empowerment (B-BBEE) legislation that compels corporate giving for socio-economic development. Companies receive certain rating points, depending on their social investment and it is important for companies

to be able to measure how many black people benefited from this investment. As a result, the kinds of civil society organisations that now receive corporate money

are those that can count the output. This has skewed corporate giving to organisations that undertake clear service delivery rather than those organisations that might be more activist.

The Southern African region also has a number of community and re-granting foundations that undertake important work to uplift communities that cannot often access regular donations from international aid agencies, the corporate sector, or private foundations.

Lastly, private foundations have existed in South Africa since the 1930s. They were established by wealthy individuals and some have substantial endowments that have grown over time. Most of these foundations operate under the radar and there is currently no research that has been done to identify the size and scope of this sector.

The foundations are registered as non-profit grant-making organisations and focus on a wide range of areas. This sector has potential for growth and South Africa is starting to see the emergence of a new black elite, some of whom have established private foundations. Currently, elements in this sector have come together to create a formal network called the Independent Philanthropy Association South Africa (IPASA) and this has led to a number of partnerships in their funding. However, we estimate that members are really only the tip of the iceberg and that the size of local institutionalised philanthropy is considerable. ■



With acknowledgement to Shelagh Gastrow, Director, GastrowBloch Philanthropies. shelagh@gbphilanthropies.co.za

MILESTONE THINKING

On-target observations in brief

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, print and digital-appeals, thanks, newsletters, donation landing pages on the website, social media, multichannel campaigns, whatever.

Tom Ahern

The life of a man consists not in seeing visions and in dreaming dreams, but in active charity and in willing service.

Henry Wadsworth Longfellow

The best way to dominate your donor visits, get more funds and create real, lasting connections with your nonprofit . . . is to *practice* every aspect of your ask.

www.nonprophub.org

A grant proposal that includes a passionate, uplifting articulation of your organisation's vision for the program can inspire funders to support your request. But that inspiration won't last long unless the proposal also describes the nuts and bolts of the approach – the specific activities and timelines you'll use to produce the desired outcomes.

www.nptimes.com

Enthusiasm is contagious. Passion is contagious. Lack of emotion is boring. To close more gifts more often, remember to keep up the emotional momentum.

Successful Fundraising

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.

Terry Murray

If you haven't got any charity in your heart, you have the worst kind of heart trouble.

Bob Hope

PHILANTHROPY IN FOCUS



Baby monkeys are traumatised and often orphaned or injured when their mothers are attacked by dogs or other monkeys, or mistreated by people.

More than a helpline . . . a lifeline

At least 10 very lucky vervet monkeys – babies and adults – are recovering in the Monkey Helpline (MH) high care unit right now.

In a few days, that number could well reach 20, as it often does, given the ever-increasing loss of these animals' natural habitat.

But thanks to the blood, sweat and tears – literally – of this one-of-a-kind organisation, hundreds of monkeys (and other animals) have been given a chance for survival.

As importantly, MH reaches thousands of learners through educational talks at schools and also advises farmers, businesses, residential estates and parks officials on the appropriate management of people/

monkey issues.

Many people don't realise that vervet monkeys are protected in terms of both national and provincial conservation legislation – and are also protected in terms of national animal protection legislation. Injuring or killing a monkey is a crime.

As the only dedicated monkey rescue project in KwaZulu-Natal, MH works with a network of vets, volunteers and other organisations to ensure the animals' recovery, rehabilitation and release.

Founded in 1995, MH fulfils a critical role in the province and is entirely funded by donations.

Visit www.monkeyhelpline.co.za for more information. ■

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 for more information. ■

Do you recognise the four early warning signs of donor withdrawal?

We've all been there . . . There's a donor that is extremely interested in your work. He or she gives regularly – at almost every opportunity – and is one of your organisation's biggest boosters. Until everything comes crashing down. Joe Garecht reports.

You suddenly realise you haven't heard from a loyal donor in six months, and haven't gotten a gift in almost a year. You look on social media, and the donor has stopped talking about your organisation. You call, and never get a call back. Your once dream donor has become . . . (yikes!) a lapsed donor.

It's painful, but true: even the best donors occasionally withdraw from organisations they support. The excitement wears off, and so does their involvement with your non-profit. But what if there was a way that you could head off donor withdrawal?

First, let's look at the four early warning signs that the excitement is wearing off and your donor is getting ready to withdraw. Then, we'll look at four ways you can bring that donor back into the fold . . .

1: Meetings/calls get shorter

Shorter meetings and calls are a key warning sign that your donor is growing disinterested with your organisation. The donor is still taking your calls and meeting with you out of a sense of obligation, but their heart is no longer in it.

2: The donors stops reposting/forwarding/replying

If a donor that normally reposts or likes everything you post on social media stops doing so . . . or a supporter who often replies to your updates stops, you may have a problem. Donors who stop social media activity and e-mail forwarding of your newsletters are showing you that they are becoming bored with your communications and work.

3: The donor RSVPs for events but fails to show up

This is a big warning sign, particularly for mid-level donors. If you have a donor who used to attend your fundraising events but who starts RSVPing for the events and not coming, it's a major clue that the donor is losing interest.

4: Missing a regular gift

If a donor was making regular gifts to your events, appeals, and annual campaigns, but has been slowly pulling away and missed a regular gift, you'll need to take drastic action to avoid permanently losing this donor.

How to bring your donor back into the fold

Ok . . . you've been vigilant, watching the warning signs listed above, and have noticed one or more of the signs cropping up in a group of donors. How can you bring those donors back into the fold? Here are four simple ways:

1: Recognise and reconnect

One great way to bring soon-to-be lapsed donors back into the funnel is by making a special effort to recognise their past support

in a way that reconnects the donor with your mission and vision.

For larger donors, this might mean things like offering them a lifetime donor achievement award or naming one of your programmes in

their honor. For smaller donors, you may want to stop by their office with a client that your organisation has helped (if appropriate) to allow the person to thank the donor for their support.

Or, you could do short, three-minute thank you videos from your office where you show them some of the good work you have accomplished through their donations.

2: Build the relationship outside of fundraising

For some donors, it may be appropriate for your staff to reconnect with them through one-on-one experiences that don't revolve around fundraising. For example, you could invite several withdrawing donors to a football game in your board chairman's VIP suite.

3: Provide volunteering opportunities

This strategy can be used with nearly every lapsing donor, no matter how large or small their average gift.

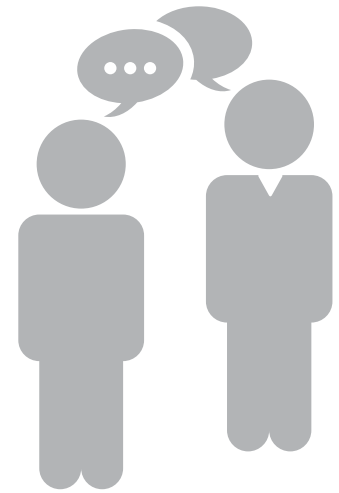
Your donor got involved with your organisation in the first place because they believed in your work. One of the main reasons why donors withdraw is because, over time, they become less passionate about your programmes. The best way to get them reconnected is to put them to work on the front lines.

4: Have an honest conversation

When all else fails, it is often beneficial to have an honest conversation with your withdrawing donors.

Many donors will tell you that they just don't have the time (or money) that they used to or that they are focusing on new philanthropic endeavours. If the donor gives you a reason for their withdrawal that you can easily and ethically address, the conversation will have been well worth it.

With acknowledgement to Joe Garecht. Visit www.thefundraisingauthority.com



A major donor tells you how to ask

MAJOR DONORS

I sat down with a major donor several weeks ago when I was in New York City. We started talking about her philanthropy, what she was trying to accomplish, what were some of her frustrations as a donor, and so on. Richard Perry and Jeff Schreifels report.

One of the things this major donor was adamant about was that “non-profits need to know their stuff”. I looked at her a bit confusedly, and I asked her to tell me more about this. She then went on to tell me several stories of sitting with executive directors and major gift officers who, when asked more probing questions, were caught not really understanding the complexity of the project they were pitching.

She said, “Jeff, if I’m the smartest or most curious person in the room, I’m probably not going to invest in that non-profit. I want these major gift officers to know what they are talking about.”

I said, “Okay, tell me then what would be the perfect meeting with a CEO of a non-profit or a major gift officer.” What she went on to say is what I want every major gift professional to take to heart.

I’m going to paraphrase and put her answers into bullet points so it’s easy for you to understand. I don’t often have opportunities like this; I have to tell you, it was fascinating. Essentially she said this:

1. Relationship – “I have to know the people that are asking me for money. If I don’t know you, if you haven’t tried to get to know who I am, I will not meet with you to talk about giving. Sometimes it can take years before I agree to sit down with someone; sometimes it could be weeks. It depends on how comfortable I feel.”

2. Meeting space – “I typically like to meet either in my home, if I really know the person, or at her organisation’s office. I want to see where the non-profit staff work and how they do their mission. I tell them no when they suggest a restaurant for lunch or dinner.”

3. Project or programme to be funded – “If I don’t have a passion for the project or programme they are asking me to invest in, I will not give. I have given a gift if I like the person, but nothing more than \$5 000. If someone is bringing me a project for which they want a very large gift (in the five or six

figures), they better know what I’m passionate about. I want them to do their homework. Don’t come to me without doing your homework.”

4. The ask – “If the organisation (CEO or major gift officer) has done their job right, then I will have a good idea of what I’m going to be asked for in our meeting. They should be talking to me and showing me the project well in advance. But what I like to do at the meeting is ask as many questions as I can to see if they are really passionate about what they want me to give to. If I sense that they are not as passionate as I am, I back away. However, if I see they have done their homework, and they tell me how my gift will change lives and how it will help the organisation into the future, I’m going to want to give to that project. I want to know the facts. I want to see a budget, but I also want to hear stories. I love a good story. Many times I never get to hear a good story, and it turns me off.”

5. Thanking – “I want to be thanked, but not too much. Send me a handwritten note. One of the best thank-yous I’ve ever received was from children at an inner-city school I gave to. They sent me a package of over 200 thank you cards, all written by the children. It was precious. I still have them in my house. And, of course, I want to know how they used that money. I make sure that if I don’t hear from them in six months, I call and ask to get a report.”

Clearly this donor is very experienced and has very strong opinions on how she likes to be asked for a gift. I think it would be wise for you to consider these words as you plan your next solicitation and how your donors want to be treated.

For me, the key point is that donors want to know you as much as they expect you to know them. That was a big takeaway for me as I spoke with her – and I hope this is something that will help you with your donors.

With acknowledgement to Richard Perry and Jeff Schreifels.

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With more and more not-for-profit organisations employing full-time funding development staff — one would think that fundraising consultants would be struggling to find employment. Yet the opposite is true — more organisations than ever before are employing fundraising counsel to work alongside their own development staff.

Who needs a fundraising consultant?

A look at the various functions of fundraising consultancy will begin to explain this trend. The ideal client/consultancy relationship is a partnership.

Goals are usually defined in two ways – fundraising programme growth and income budgets.

Targets for programme growth often consist of a defined number of new donors on the database, or the implementation of a properly planned major gifts component, or perhaps the introduction of bequest promotion. Financial budgets are usually measured in additional net income.

What are the various roles that the consultant can fill? 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, typically the account executive, 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 of mailings agreed, the next step is the selection and negotiation of rented mailings lists. This too requires specialist knowledge and often a long-standing relationship with list brokers.

Envelope, print and computer bureau prices are negotiated and compared with the previous and other recent quotations. Where necessary, competitive quotations are sought. A timing schedule is drawn up to ensure that each mailing mails on time.

Once 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 that will lead to the right decisions to increase responses and income in the future.

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
- Fundraising audits to advise on improvements and additions to existing development programmes
- Proposal writing

- Leadership, staff, volunteer and board development and training
- Bequest prospect identification and promotion
- Public relations and marketing.

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 not-for-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 experts 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. Counsel can also help recruit top business people to assist in not-for-profit cause – as corporate representatives often applaud the employment of consultants as a good 'businesslike' move.

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 each client's fundraising programme succeeds.

In conclusion, a good partnership between a not-for-profit organisation and a fundraising consultant has these essential ingredients:

- A mutual respect and trust which recognises the knowledge and expertise which exists in both parties.
- Commitment to meeting agreed deadlines.
- A sharing of ideas and experiences – from the not-for-profit organisation – stories of people being helped, letters from grateful recipients, details of new projects and directions.
- From the consultant – advice on what is 'hot' and what is not in other parts of the country and the world.
- Regular quarterly 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 the late Terry Murray.

How one organisation doubled its year-end fundraising

STRATEGY

This non-profit, which had one full-time fundraiser on staff, had been sending out year-end appeal letters, by snail mail, for the past eight years, with mediocre results. My first step, obviously, was to make sure that year's appeal letter was the best it could possibly be.

But – and this is important – the organisation's previous year-end appeal letters were pretty good. I figured we might be able to raise an additional 5-10% by making some small changes in that year's letter . . . but we needed to raise far more than that.

What else could we do?

When it comes to raising more money during the year-end giving season, there are lots of ways to go about it, particularly for an organisation whose year-end effort was to simply send out one well-written snail mail letter appeal.

We could send a follow-up postcard after our snail mail appeal letter to remind our donors about making their year-end gift. I estimated that if we did that, and the postcard was well done, we could add another 2-5% to our year-end revenue.

We could also send out an e-mail appeal to our entire e-mail list that complemented our snail mail letter, was well written, and asked people to make an immediate donation by clicking on a link in the e-mail. I figured that if we sent out one e-mail, we could raise an additional 5-10% through our year-end campaign, and that if we sent out two such e-mails, including one on December 31st, we might be able to raise even more. . . perhaps boosting our year-end giving by as much as 15%.

Social media push

Finally, we could really push our year-end campaign on social media. My best guess was that we could add 1-2% to our year-end revenue by effectively using social media.

I provided all of those options to the non-profit I was working with . . . each were good options, and I have successfully implemented all three at various organisations. I also presented them with a fourth option, what I call "The Mega Option" for year-end fundraising.

I call this option the "Mega Option" for year-end fundraising because it is the one tactic that has the potential to massively grow your year-end fundraising revenue. No other strategy, with the exception of a well-written snail mail housefile appeal letter, has the capacity to add so much income to your year-end appeal.

The "Mega Option" is to pick up the phone and make asks, one-on-one, to your

best donors.

It's a strategy that is almost never implemented by non-profits during the year-end giving season.

In fact,

when I have

suggested it in the past to organisations I was working with, several told me flat out that it simply was "not appropriate" as part of a year-end fundraising campaign. I was informed by those non-profits that year-end fundraising was primarily a direct mail affair, with perhaps some e-mails thrown in.

Ugh. When it comes to fundraising, the proof of a strategy's strength is its ability to generate revenue. Unless the tactic is unethical, if it raises more money than other tactics without hurting income in the long-run, you should implement it. Adding phone calls as a follow-up to year-end fundraising letters works – I have seen it time and time again. There's nothing unethical or inappropriate about it.

And yes, it can be done without infringing on people's holidays. You can call donors at the office. You can call them the week before Christmas. You can call them on December 30th. If you plan your appeal, you can make calls without making your donors feel angry or awkward. So why aren't you doing it?

Thankfully, the organisation I mentioned at the beginning of this article took my advice and added phone calls to their year-end fundraising mix. They figured out that with the help of the development director, executive director, and board chair, they would have time to make calls to the top 15% of their donor base . . . which they did.

The donors were delighted to hear from the organisation.

The phone calls were donor-focused, relatively short, and framed as a "thank you" for all of the past support and a follow-up on the vision for the coming year that was laid out in the snail mail appeal the donors had just received.

And, the best part: we raised 100% more during that year-end fundraising season than the year before. Simply by adding follow-up calls. It worked for that organisation, and it can work for yours!

www.thefundraisingauthority.com



Two years ago, I had the chance to consult with a small but growing non-profit in the Deep South. One of my challenges was to rapidly grow this organisation's year-end fundraising. Joe Garecht reports.

Set yourself apart in a crowded market



Setting yourself apart in a crowded fundraising market should start with an objective, fair assessment of how you raise funds, fulfil donor expectations and keep building support for your organisation.

Downes Murray International can help.

We have worked alongside South African and international not-for-profit organisations for more than 25 years, building fundraising capacity and helping charities to develop and implement sustainable funding and donor stewardship programmes.

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

- **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 – per annum at \$95) website: <http://philanthropy.com>
- **Ahern E-News**. Subscribe for free at www.AhernComm.com
- **The Fundraising Authority**. Visit www.thefundraisingauthority.com

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FUNDRAISING THOUGHT LEADERS

Downes Murray International (DMI) are fundraising specialists, working with charities and non-government organisations of all kinds, to increase their fundraising effectiveness.

DMI offers feasibility studies, strategic planning workshops, direct mail fundraising, mail/phone, 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:

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