

Staying ahead of the pack in 2002

Fundraising Forum approached leading fundraising practitioners around the world for their predictions for 2002. This is what they had to say ...

Decreased government funding, a surge in online giving, the expansion of monthly gift clubs and the need for superlative donor care are some of the trends to look out for this year.

That's the word from fundraising practitioners approached for their predictions for 2002.

'The world economic downturn, precipitated by the events of September 11 last year, will make 2002 a tough year for the non-profit sector,' says Terry Murray, President of DVA Navion in South Africa.

Rising interest rates and the devalued Rand will result in a drop in disposable income which was used to support favourite charities, he said.

'The corporate sector will further reduce donation budgets and focus on more partnerships offering a *quid pro quo* and a return on investment.'

Murray added that the situation in Zimbabwe and the South African government's attitude to that and other impending crises, are likely to spark a further rush of emigration by wealthier members of the 'giving' population.

But past events have proved that donors continue to be incredibly generous. He said that while the number of donors may drop, the average donation of those who continue to give often increases.

So, people with real wealth still retain it in hard times and often give more when made aware of the increased need.

'Fortunately bequest income continues to rise dramatically and remains the fastest growing source of fundraising income. And it is one source of income that is totally unaffected by recession!' said Murray.

Other predictions for 2002 include:

- 'Smart organisations will focus on joint strategic planning between their fundraising, communications and programme departments for maximum synergy and to maximise net revenue.'

Gwen Chapman, senior vice president, Mal Warwick and Associates Inc. California.



- 'The international stage has become more and more relevant. Fundraising with national boundaries alone, limits returns. Organisations with no structured plan to promote bequests, will miss out badly. Major gifts fundraising will remain a 'must do' in fundraising plans. Total development strategies integrating all types of budget, capital and endowment fundraising are a must for every annual fundraising plan. Needs must be well reasoned, urgent and compelling, in order to be funded, and must capture the imagination of people and motivate them to help. Their gift must be recognised, and their interest nurtured.'

Michael Downes, DVA Navion, Australia.

- 'Successful fundraisers must continue to focus on the basics: listening to donors, satisfying their needs and remembering to ask. E-mail will grow as a way to bond donors to a mission, but if used improperly, it will alienate them. Monthly pledge programmes will expand much faster than other forms of fundraising, because donors like them, and non-profits raise much more money at a lower cost.' (See page six).

Harvey McKinnon, President of Harvey McKinnon and Associates, Vancouver.

- '2002 will see online fundraising coming of age. Now that fundraisers can see examples of success, they'll want to maximise revenues online.'

Marc Nobr, Managing Partner, Kitcatt Nobr Alexander Shaw Ltd, London.

INSIDE INFORMATION

Why should I support you?.....	2
It's a dog's life.....	4
Enhance your CEO's image	5
Seven persuasion techniques	5
A monthly giving club could be just the ticket for you	6
An 'A' in penmanship – handwritten notes are working ..	7
Stay focused on bequests	8
Should callers ask 'is this a good time?'	8

Why should I support you?

Not that many years ago, the Corporate 'buzz phrase' was 'USP' – Unique Selling Proposition.

Coined by the late Rosser Reeves of the Ted Bates Advertising Agency, the Bates

Agency even made the phrase its own USP worldwide and went about gaining clients by showing them how to develop a USP and then use it in their marketing and advertising programmes.

Simply put, a USP in the for-profit sector set out to answer the question: 'Why should the consumer or customer choose to buy our product or service, over that of our competition?'

And the exercise of finding a USP for a product, a service, or a whole company serves to create focus on benefits to the customer, and satisfying consumer needs better than the next organisation.

In these highly competitive times with the vast proliferation of non-profit organisations throughout the world and ever-increasing competition for the attention and interest of donors, this same concept can be extremely beneficial to members of the non-profit sector.

I remember reading an article in one of the International Fundraising Journals last year, which referred to the non-profit USP as a Unique Serving Proposition – a very clever and apt switch of words.

To find a USP for your organisation, you need to get together a small group of key people representing your various constituencies.

Ideally, you might have your Director, the person in charge of fundraising, the person who heads up your provision of services, your Board Chair and one or two representatives of your donors and your beneficiaries, if this is appropriate.

Organise a two or three hour workshop session with these key players and then set out to answer three key questions:

- What makes us different?
- Why do we exist?
- Why should people support us?

The answers to the first question 'What makes us different?' will give you the points of difference which you can emphasise in your organisation's marketing, publicity and fundraising efforts.

These are the unique features that will help to make you stand out from other organisations in a similar field of endeavour – and particularly those whom you know are competing directly with you for funding.

By answering the question 'Why do we exist?' you'll arrive at a clear statement of the benefits you are providing, and you'll create the opportunity to review the relevance of those benefits to the beneficiaries of your services.

In these times of rapid and constant change, it is often surprising how something which was so relevant and important just a few years ago, has now become outdated and may even be obsolete.

Looking closely at the question, 'Why should people support us?' is an essential precursor to successful fundraising.

It focuses attention on the needs of the donor, so important in these days when so many people (especially in the Corporate sector) are asking the question, 'What's in it for me or my organisation if I support you?'

By putting on the donor's hat for a while and brainstorming what your potential donors might want in return for their financial support, you'll find that the answers help you to develop many new ideas for donor acknowledgement and recognition.

As importantly, you may be able to find ways of developing closer relationships between donors and your organisation and perhaps find some lucrative 'Cause Related Marketing' opportunities or ways of attracting 'in kind' donations of goods, services or valuable expertise in the form of executive time.

Starting to think like a donor rather than just accepting that the worthiness of your cause deserves automatic support, is often the first step to a whole new level of support for Non-Profit organisations.

So, in conclusion, why not take a leaf out of the corporate for-profit book and conduct a USP workshop for your organisation?

The results could generate renewed enthusiasm amongst staff and board members and give you some valuable new fundraising and marketing tools for years ahead. ■



Terry A Murray is Founder and former Chairman of Downes Murray International and President of DVA Navion in South Africa.

'Looking closely at the question, 'Why should people support us?' is an essential precursor to successful fundraising.'

Milestone Thinking

On-Target Observations in brief

Proofreading tip

Review text with your eyes to see what is printed rather than mentally vocalising the text. You can also try reading the page from bottom up and from back to front.

*With acknowledgement to
Successful Fund Raising
December 2001*

Discontented constituents deserve to be called upon

Do you ever find yourself avoiding constituents who might be angry with your organisation?

Some development officers argue that those discontented constituents make better prospects than those who are indifferent about your cause. Why? Because they care enough to become upset in the first place.

Don't avoid constituents who you believe to be upset with your cause. Rather, meet with them to resolve past issues.

*With acknowledgement to
Successful Fund Raising
October 2001*

Rule of thumb

Remember that every cultivation 'move' you make on a prospect is intended to bring him/her closer to the realisation of a gift. If it doesn't, you're wasting your time.

*With acknowledgement to
Successful Fund Raising
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E-mail press release tips: make your subject line attention-grabbing

Using e-mail to send out press releases for your organisation is an effective way to get your message out to the media. The subject line of your e-mail press releases is particularly important. Since it's the first thing the recipient will see, make the subject line a compelling attention-grabber.

*With acknowledgement to
Successful Fund Raising
July 2001*

Annual report tips

Include a 'bounce back' in your annual report that invites gifts for the current fiscal year and allows readers to ask for more information about available gift options.

*With acknowledgement to
Successful Fund Raising
November 2001*



Filling days with hope

On a busy day the patio and parking lot outside House Number 35 at McCord's Hospital in Durban is a hive of activity.

Men, women and their children exchange chatter, offer advice and help each other to solve problems.

And all the while their hands are busy ... creating beautiful beadwork in all shapes and sizes – from Christmas decorations to necklaces and key rings.

Sinikithemba means 'we give hope' – and to the people who come here, it does.

Because AIDS sufferers – especially women – are often left destitute when they disclose their HIV status, enduring hours of loneliness and despair, made worse by unemployment and being unable to feed their children.

But this is all changing, thanks to *Sinikithemba*. On some days, more than 300 people come here to do what they know best ... create vibrantly coloured works of art.

The beadwork is sold locally, and is finding its way onto the international market. *Sinikithemba* also caters for corporates, and produces beaded company logos, in frames, on keyrings – and almost anything else.

And for the people who work here, *Sinikithemba* offers dignity, hope, a sense of shared community, and most importantly, an income to support their families.

A percentage of the profits from the sale of the beadwork goes towards supplying free medication, counselling, education, home-based care, and other services to patients visiting the centre. To contact *Sinikithemba*, telephone (031) 268 5804/5718.

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

For the past six years Sinikithemba Christian Care Centre has been giving hope, opportunity and dignity to people living with HIV/AIDS in and around Durban.

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 DMI staff, there are extracts from worldwide fundraising publications which are reprinted with acknowledgement to the publishers.

We welcome submissions for publication from all writers involved in not-for-profit work.

It's a dog's life!



*What gives in Britain?
From her new home in
Edinburgh, Scotland,
Sheila McCallum reports
on trends from the UK.*

Britain is a great place to live ... especially if you're a dog.

British mutts are taken everywhere by their owners – to the park, on trips to the shops and even the pub, where they are fawned over by all the women and treated with fond indulgence by men who happily queue six deep for their drinks, rather than disturb a sleeping dog at the foot of the bar.

Britons are famous for their devotion to creatures great and small. So it's no surprise to find that (according to a list published by CharitasData) the British public donated a heartwarming £55.6 million to the RSPCA in 2000. A further £44 million was given to the RSPB (*Royal Society for the Protection of Birds*) while the *People's Dispensary for Sick Animals* attracted £32.5 million.

But this generosity does not extend to their fellow beings! *Help the Aged*, a well known, established organisation providing accommodation, food, heating and other essentials to the nation's frail and poverty-stricken elderly, garnered only £26.6 million during the same period – less than half the amount donated to the RSPCA.

In Scotland, the top fundraiser was the *English National Trust*, which already owns vast tracts of the country – while *Shelter*, an organisation campaigning against homelessness, failed to make the top 30.

So, are the British a nation more concerned by the thought of a puppy being kicked than an old lady freezing to death? Not necessarily. Because, of course, this is the land of the dole and the National Health; Britons expect their government to look after the needy.

South Africans appear to follow the same mindset – to some extent – as evidenced by the current demand for government to provide free anti-AIDS drugs for HIV-positive pregnant women, and land and low-cost housing to disadvantaged communities.

All well and good, perhaps; pay your taxes and let the government deal with the problems. But no matter how good the system, there is surely no substitute for philanthropy – that instinctive spirit deep within us all, that conditions us to unite for the common good.

We are not built to operate in selfish isolation. Since the dawn of time, human beings have gathered together in communities, to protect and help one another.

There's a feeling in the UK at the moment that all the hype surrounding the arrival of the new millennium, and the anticipated dawning

of some brave new world, was naïve, to say the least. Especially, given the events of last September 11, the on-going violence in the Middle East and, the recent gunning down of a young Catholic postman in Ireland.

People are realising that to change the world, we must all strive to change our own attitude ... to replace hatred and dissent with love and understanding.

Following on from this comes my own dream for 2002: to resurrect the spirit of philanthropy.

Imagine if every able-bodied person in the world gave up just a few hours a week ... to rock an AIDS baby to sleep, clear litter in a polluted river, collect jumble for a charity fête, or even perform mundane administrative tasks for a welfare organisation.

Imagine if we made a concerted effort to teach young people the value of caring for others. Many South African schools have wonderful outreach programmes – everything from visiting old-age pensioners and children's homes to involvement in literacy and education programmes for their less privileged peers. But these programmes don't go far enough. They're seen as fun extra curricular activities, not as a way of life.

Imagine the difference we could make if we went back to that old Biblical system of tithing – donating a percentage of everything we earn to help the poor and needy.

We might all experience for ourselves the truth of Rabbi Harold Kushner's words:

*'When you carry out acts of kindness,
you get a wonderful feeling inside.*

*It is as though something in your
body responds and says, Yes, this is
how I ought to feel.'*

Enhance your CEO's image throughout the community

When your organisation is raising funds – particularly major gifts during capital campaigns – it is crucial that your CEO be visible in the community, playing a top role in cultivating and soliciting leadership gifts, says Linda Lysakowski, a consultant for Capital Ventures.

A well-respected CEO can help your organisation build credibility for its programmes and can be a tremendous asset for your fundraising efforts, says Lysakowski. She gives this advice for getting your CEO recognised and thought highly of by the public:

- Have your CEO join and participate in local Chamber of Commerce events, and be sure he/she is a member of the largest Rotary or other community service organisation.
- Get your CEO on the speaking circuit to talk about your organisation.
- Have your CEO attend other nonprofit organisation's

events, especially the galas and dinners where major donors are likely to be.

- Have them write letters to the editor when issues affecting your organisation are in the news.
- Look for opportunities for your CEO to be published in trade journals and well-read publications.

Having trouble convincing your CEO of the need of these things? 'Ask any well-known organisation in your community that has recently run a successful campaign about the role of the CEO and then have that person talk to your CEO,' says Lysakowski.

Source: Linda Lysakowski, ACFRE, Principal, Capital Venture, Reading, PA. Tel.: (877) 540 2896. E-mail: linda@venturesinphilanthropy.com ■



Linda Lysakowski, a consultant for Capital Ventures, suggests that a well-respected and highly visible CEO is a valuable asset for your fundraising efforts.

With acknowledgement to Successful Fund Raising November 2001

Seven persuasion techniques

Whether you're trying to get a donation or convince a potential volunteer to join your cause, here are seven techniques to help persuade someone to your way of thinking.

1. **Keep it short and simple** – Today, being brief and to the point is essential when trying to sell your ideas, whether on paper or in person.
2. **Get to the point** – Nothing is more frustrating than having a person talk and talk but never seem to say anything.
3. **Be positive** – When fundraising, present your organisation or cause as a success, not as an about-to-be failure that needs the donor's money and help to survive. As Harold J. Seymour wrote in his book, *Designs for Fund-Raising*, 'sell the opportunities and not the deficiencies, never forgetting that money flows to promising programmes and not to needy institutions.'
4. **Be as personal as possible** – A phone call is always better than a letter. If you send a letter add a note or P.S. indicating that someone will follow up with a phone call.
5. **Find out their relationship to your group or cause** – Are they directly interested in your cause? Do they have a family member who was helped by your group or who was part of the organisation? Knowing that relationship can help present your case as to why the person should donate to your cause or join the organisation.
6. **Find some common ground** – Ask how long they've known of or been associated with your cause, and how and why they got involved. Build from those ties.
7. **Listen** – A key to success is effective listening. When trying to persuade others to your way of thinking, listen to what they say, and what they don't say. You'll be able to steer the conversation toward their interests, and yours as well. ■

Confidence and know-how are essential tools when convincing a potential donor or volunteer to support your cause.

With acknowledgement to Successful Fund Raising June 2001

A monthly giving programme might be the ticket for you

Harvey McKinnon, president of Harvey McKinnon and Associates in Vancouver, British Columbia, says a monthly giving programme is the ideal way to build donor loyalty and boost your organisation's income.



Harvey McKinnon

If you're looking for a way to build donor loyalty and boost your nonprofit's income, a monthly giving programme may be just what you need.

Harvey McKinnon, president of Harvey McKinnon and Associates in Vancouver, in British Columbia, says a monthly giving programme is a plan where you ask donors to make a contribution to your nonprofit 12 times a year. He says the advantages of such a programme are many:

Increased annual giving: 'On any database, you'll be able to find 3 to 10 percent of donors willing to make that monthly pledge. And you end up dramatically upgrading annual giving of a donor – on average, two to three times for most groups.'

Donors remain with the nonprofit longer: McKinnon says when donors give monthly through electronic funds transfer or credit card, they stay longer.

Convenient: 'It's convenient for both the organisation and donors,' he says. 'And by my calculations, it will increase your income by about 800 percent over the lifetime of the donor compared to what it would have been without the programme.'



Predictable: Organisations can depend on having money coming in through their monthly giving programme.

Cost effective: 'Transaction costs for the average gift are quite low,' says McKinnon. 'Plus organisations don't have to send donors all the mail they normally would, so they save money on that as well.'

Low attrition rate: McKinnon says one programme he worked with recently had an attrition rate of just 3 percent. 'Out of 4200 people, 97 dropped out. It's basically those people who are dying or moving out of the country.'

How to set up a monthly giving programme

Harvey McKinnon offers these steps and suggestions on how to set up a monthly giving programme at your nonprofit.

- 1. Select someone to process the gifts.** McKinnon says the first step is to find a bank or supplier who will process the gifts for you. Handling the monthly donations electronically through Electronic Funds Transfer (EFT) or credit card is the best solution. 'Large organisations can collect cheques and send out statements, but it's much more administratively expensive. Also donors drop off quicker and, on average, will give about eight or nine gifts a year.'
- 2. Give the programme a name.** Nonprofits need to name their monthly giving programme, he says. Having a name to identify the monthly giving programme will help with the next step.
- 3. Promote it.** 'Then they need to calculate what their strategy will be to promote it. And that's essentially integrated marketing so you promote it everywhere.'

After that, McKinnon says the rest is easy. He says one organisation he has worked with has one staff person who manages 6500 donors. 'And they're dealing with all the issues, like address and bank information changes, and they make over \$2 million a year.'

Source: Harvey McKinnon, CFRE, President Harvey McKinnon & Associates, Inc., Vancouver, British Columbia. Tel.: (604) 732 4351. E-mail harvey@harveymckinnon.com. McKinnon's book *Hidden Gold*, details the process of setting up a monthly giving programme. To order, call Harvey McKinnon and Associates. Tel.: (800) 815 8565.

*With acknowledgement to
Harvey McKinnon in
Successful Fund Raising
November 2001*

An 'A' in penmanship – handwritten notes are working

The *American Cancer Society* started outsourcing its thank you cards to \$100 and upped acquisition donors a year ago with handwritten note cards.

While the success of the ACS's note cards is pending, others in the sector are reaping hefty response rates and profits.

Pamela Muhammad, administrative specialist for the direct marketing department of the *American Cancer Society* in Atlanta, said, 'every time someone donates \$100 (or more) to our acquisition programme we send out a handwritten note thanking them.'

The handwritten note Muhammad is talking about is truly handwritten, not computer-generated, or mass-produced.

'In that note it basically talks about some things that their \$100 could possibly do,' she said. 'The message also conveys to the donor that their gift of \$100 or more touches so many lives in so many profound and lasting ways and thanks them for their monetary gift.'

ACS sent out roughly 5000 thank you cards in 2001, cards that they designed themselves. Louisville, Kentucky-based DNR Group, Inc. handles all of the actual writing and shipping. 'It has the (ACS) logo on it and they mail them out for us,' Muhammad added.

Muhammad believes it's too early to calculate the effectiveness of the thank you cards, and she expects appreciable results to be in by next campaign season.

Life Outreach International, based in Fort Worth, Texas, has used handwritten note cards successfully for a little more than six years, according to Vice President Terry Redmon.

LOI mails out one strictly handwritten mail piece a year, and it typically out-performs other correspondence mailings 2 to 1 and often as much as 3 to 1, considering the return on investment. Response rates have also been well above average during the three years – ranging between 7 and 20 percent, said Redmon.

As for Larry Correa, Vice President and chief information officer for *Larry Jones International Ministries*, Feed the Children in Oklahoma City, Oklahoma, his organisation has successfully mailed Christmas thank you note cards/appeals to its \$1000, and above donors for the past three years.

'We use them as an appeal ... It's our last appeal at Christmas time,' said Correa. 'It drops on December 25 to get that very last donation from the donor.'

The 2000 Christmas time, thank you note card mailing, which is mailed to roughly 100 000 higher-end donors, garnered an outstanding 15 percent response rate.

And although Correa would not divulge average gift sizes, he said the note card, with handwritten addressed envelope, personalised typed note, and handwritten P.S. is the main reason the nonprofit continues the mailing.

The handwritten P.S. reads, 'we are so grateful for your generosity as a member of our Founders' Council (\$1000 and above donors),' said Correa. 'The typestyle in the note looks like it came off a typewriter. So it's not a handwritten appeal *per se* – the whole thing isn't done in that same font.'

Indianapolis-based *Lighthouse Ministries, Inc.* uses handwritten note cards once and sometimes twice a year, said President Dale Collie.

'I even personally put a note on large donor thank you letters in addition to the receipt-type letter,' noted Collie. 'I put a handwritten note on each one of those. And there are times when I am out of the country, or whatever, that we'd still like to give that personalised message on there.'

Collie did not reveal response rates or average gift sizes for the note cards, which the organisation used for three years, saying that they perform a couple of times better than what normal correspondence renders.

'We're not going to replace anybody's direct mail; what we're going to do is complement it. We're going to be that one or two mailings a year that you send out to lapsed donors,' said David Redmon, president of DNR Group Inc. 'We've gotten as high as 22 percent (response rates) but we never get lower than 7 percent.'

DNR actually guarantees certain packages, Redmon explained. 'If you send us 24- to 48-month lapsed donors then we'll pay for the postage, the mail, the print, we'll pay for everything,' said Redmon. 'If it pays for itself you owe us the money; if it doesn't pay for itself you don't owe us anything.'

Redmon said DNR has never lost on one of its guarantees during its seven years in existence, and handwritten packages will raise any organisation's average gift by 18 percent – no matter who you are or where you mail. ■



We are so grateful for your generosity and continued support – thank you!

American nonprofits who are sending donors handwritten cards and thank you notes, are yielding surprising results.

*Adapted from
The NonProfit Times
September 2001*

Stay focused on bequests

Even with the sophistication of some planned gift shops, bequests still account for about 70 percent or more of all planned gift types. That's why you can represent a one-person development organisation and still promote planned gifts. So what are you doing to market bequests to donors? Here's a checklist of ideas from which to draw:

- At least once a year, invite everyone on your mailing list to consider making a bequest to your organisation.
- Include an article in every newsletter or magazine about some aspect of bequests. Sample wording for a will that has a bequest to your organisation; a profile of how a realised bequest is impacting your organisation and its programme etc.
- Share anecdotes about bequests made to other nonprofits and how those gifts transformed the organisation.
- On all pledge forms, brochures and literature you produce, include the phrase, 'please provide me with additional information about making bequests,' along with an address, e-mail or phone number to call to receive that information.
- Seek the permission of those who have made bequest provisions to publicise their intent among select groups of prospects.

Source: Successful Fund Raising, June 2001. ■

Should callers ask 'is this a good time?'

'Asking 'is this a good time?' is good manners. So what if you have to call back? If that call back leads to a larger gift than you wouldn't have gotten otherwise, it's worth it.'

Peter Wylie, Principal, Margolis Wylie Associates, Washington, D.C.

'I instruct my callers not to ask 'is this a good time?' because it is an extremely easy 'out' for the prospect. Instead, we ask 'how are you this evening?' It is not only polite, but provides you with the same information that you're looking for. If it's not a good time, they will tell you. We also find that a lot of the time, we are told it's not a good time when in reality, they want to say no and just can't.'

Diana Chavez, Director of Telemarketing, University of Southern California (USC), Los Angeles, California

'Rather than 'is this a good time?' to talk, we use 'do you have a moment to talk?', because it suggests the call will only take a moment.'

Scott A. Nolan, Assistant Director of the Annual Fund, Eckerd College, St. Petersburg, Florida

Source: Successful Fundraising, November 2001 ■

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Downes Murray International

DMI 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, church fundraising and bequest promotion programmes. In addition, DMI has close links with a number of fundraising consultancies across the globe, enabling us to keep a finger on the pulse of international trends and techniques. For further information contact your nearest office.

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Volunteering nightmares?

If managing your volunteers has become a nightmare, then help is at hand!

Written by Michele Williams and edited by Jill Ritchie, *Making Volunteering Work* is an essential guide for anyone working with volunteers in Southern Africa.

Making Volunteering Work covers all you need to know about labour legislation and volunteers, recruitment, volunteer management, volunteers' benefits, volunteers and insurance coverage, and includes a host of checklists, tips and ideas.

A useful disk with a variety of pre-



designed forms for managing your volunteer department is included. The forms are in printable MS Word format, and include an application form, letter of appointment, expenses claim forms and a task description form, among others.

To order a copy of *Making Volunteering Work* fill in the form enclosed in this issue of *Fundraising Forum*, or post a cheque, payable to Papillon Press, to Papillon Press, PO Box 26249, Hout Bay, 7872.

Making Volunteering Work costs R114 per copy and R15 per book for postage and packing. ■