

## Affirmation, rather than Innovation, at UK Fundraising Conference



For the over one hundred delegates who gathered at the Hilton Grosvenor Hotel in Glasgow on 30 May for the *Professional Fundraising Conference and Show*, there was little in the way of fantastic new ideas. Instead, the emphasis was very much on the tried and tested techniques – with sessions dedicated to familiar subjects such as capital appeals, legacies, major donors, donor development, trust applications, direct marketing, events and internet fundraising.

However, there was a vibrant buzz about the event; those new to fundraising found plenty of inspiration and even the ‘old hats’ benefited from revisiting the basics and the opportunity to network with colleagues.

Anyone who’s ever run a capital campaign would have derived great comfort from the case history presented by Colin McCallum of the *National Museums of Scotland*. Entitled ‘Against the Odds – not another capital campaign!’ Colin described the string of challenges his team had to overcome in raising money for the new *Museum of Scottish Country Life* – including donor fatigue due to a concurrent capital campaign for another project, confusion caused by an enforced partnership with the *National Trust for Scotland*, and a daunting escalation in the initial target. Despite all the difficulties, the organisation’s strategy resulted in £1.3 million raised over a two-and-a-half year period.

It was interesting to hear, during the direct marketing session, that the growth of direct mail in the charity sector is outpacing all other sectors, with the exception of financial services and beauty products. In fact, most people learn about charities through direct mail. More good news: it is possible to recruit younger donors through direct marketing



*The Museum of Scottish Country Life’s capital campaign team was faced with a string of challenges when raising money for the new museum. The Museum shows how country folk – living on farms like the one pictured above – helped shape today’s Scottish countryside.*

campaigns – the trick is to speak to them differently.

Online giving is increasing in the UK, although there is still some reticence to this medium. Using e-mail or sms messages to ask for donations is not advised, as these are seen as very intrusive.

Among the newer ideas that are working for some organisations are corporate partnerships (creating a win/win relationship where both parties receive tangible benefits) and sponsored adventure events.

Companies such as *Skyline UK* offer a complete fundraising event management service, encompassing activities such as parachuting, abseiling, white water rafting and fun runs. As part of the service, *Skyline* provides promotional literature, collects sponsorship money from participating individuals or corporate teams on behalf of the charity, makes all the arrangements and looks after participants on the day – which means the charity doesn’t even have to attend the event! *Skyline* works with over 800 charities across the UK and raised over £2 million on their behalf last year. ■

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# Calling all resource mobilisers!

Through all the years that I've been involved in fundraising there have been many occasions when people or organisations have attempted to avoid the term 'fundraiser' or 'fundraising'.



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

For some reason they feel that there is a stigma attached to the idea of raising funds for a worthwhile and deserving cause. The question is, why?

Maybe it has to do with the way some folks are stunned into an embarrassed silence when you answer the inevitable question 'So what do you do for a living?' with 'I'm a fundraiser'.

Or maybe it is because they are tired of hearing the old chestnut: 'Oh – so will you raise some funds for me?'

A fairly recent trend in the United Kingdom has many people in the fundraising business calling themselves 'marketeers' – a complete misnomer that leaves me

thinking of 'buccaneers' – and maybe there's a good reason for that!

The description 'Resource Mobilisation' seems to have been invented here in South Africa – and is being frequently used by the Southern African Institute of Fundraising (note 'Fundraising'). So I asked SAIF President Kelvin Glen about its origin and even he didn't know where the term originated.

Frances Lake added the idea that it might have been picked up by Ann Bown from her international contacts as being a more encompassing phrase than fundraising.

Another SAIF representative ventured a guess at the meaning and thought that it might have been started by my old friend David

Cuthbert, who – together with myself and three others – founded SAIF many years ago.

Even this year's SAIF Convention is being called a 'Resource Mobilisation and Development Convention' – no talk of fundraising – that unmentionable thing which we all actually do, and without which the non-profit organisations for whom we work and the causes which they support – would all fade away and die.

In fact the very thing which got me thinking about this ridiculous description, was

an e-mail from a former Downes Murray International colleague who is now working for one of the USA's top direct mail fundraising consultancies in California.

She had seen the SAIF Convention title and asked me what on earth 'Resource Mobilisation' was – as she had seldom heard such a weird description.

The term 'fund' or 'fundraising' features in the titles of all the major institutions around the world – The Institute of Charity Fund Managers in the UK, the Australasian Fundraising Institute 'down under', and in the USA, the Association of Fundraising Professionals and the American Association of Fundraising Counsel.

So let us not try to pretend that as fundraisers in South Africa, we are something different – or before long we'll all be members of the Southern African Resource Mobilisation Institute – or 'SARMI' – a sandwich with a filling of a different kind!

Let's accept that what we do is in fact, fundraise and that the description more than adequately covers the art of asking for 'gifts in kind', help in the form of volunteer time and effort, bequests and any other form of philanthropic or cause-related gift you can imagine.

Come on South African fundraisers – stand tall and tell the world with pride what you really do for a living. There are few more challenging, or more rewarding professions and you should all be proud to call yourselves fundraisers.

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***'For some reason they feel that there is a stigma attached to the idea of raising funds for a worthwhile and deserving cause'***

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Which brings to mind my favourite definition of the tasks of a fundraising consultant.

The role of a fundraising consultant is sometimes to be an 'amiable pest'; to remind influential volunteers and non-profit leaders of their potential and their ability to make a real difference;

and to guide and keep on track the fundraising process by keeping everyone focused on only those actions which are important.'

*Footnote:* If you can shed more light on the origins of the term 'resource mobilisation' – or if you would like to comment on this issue – we'd like to hear from you. Send your views to: The Editor, *Fundraising Forum*, P O Box 3455, Durban, 4000 – or e-mail [r\\_solomon@mweb.co.za](mailto:r_solomon@mweb.co.za)

We'll publish a selection of comments in the next issue of *Fundraising Forum*. ■

# Milestone Thinking

*On-Target Observations in brief*

Without a human touch and recognition of the very humanity of relationships – specifically with those individuals expected to follow their leader and support the organisation’s goals – little time, motivation or inspiration will be found.

*With acknowledgement to  
Fund Raising Management  
July 2001*

## Public speaking etiquette

Never leave the lectern unattended. After introducing a speaker, wait until the individual comes to the lectern, shake his/her hand, then leave. If you’re the speaker and have finished your talk, wait for the emcee to return to the lectern before leaving.

*With acknowledgement to  
Successful Fund Raising  
February 2002, Vol X, No. 2*

## A fundraiser’s place in heaven

A man knocked at the heavenly gates,  
His face was scarred and old.  
He stood before the man of fate  
for admission to the fold.  
‘What have you done,’ St. Peter asked,  
‘To gain admission here?’  
‘I’ve been a fundraiser, Sir,’ he said,  
‘For many and many a year.’  
The pearly gates swung open wide;  
St. Peter rang the bell.  
‘Come in and choose your harp,’ he said,  
‘You’ve had your share of hell.’

– Author Unknown –

*With acknowledgement to  
Successful Fund Raising  
February 2002, Vol X, No. 2*

## Team solicitation tips

Whenever making a joint call with another staff member, board member or volunteer, be sure everyone knows this rule: Whenever a question is asked of the prospect, no one is to speak until the individual has fully completed his/her response. Silent pauses between remarks are acceptable. Be a sensitive listener.

*With acknowledgement to  
Successful Fund Raising  
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# Where there’s a will, there’s a way

**A**t the Ilitha (meaning ‘light’) Educare project there are few toys. No chairs and tables, and few brightly coloured crayons or books.

But there is a woman with passion – and the determination to succeed in spite of enormous challenges.

Christine trained as an early childhood development teacher through HOPE Africa. And with virtually no resources – and no classroom – started an educare group for children and their parents living in Khayelitsha.

A mother in the community opened her home, and every day 99 children come in three ‘shifts’ to the tiny shack: to learn about animals, the alphabet, shapes, sounds and their bodies.

Parents – many of whom are unemployed – also attend, when they can. Christine teaches them about child development, health care, and how to identify the symptoms of child and drug abuse.

Using magazine cuttings, tins, plastic containers – and whatever else is available – Christine makes her own posters and teaching aids. And at the same time brings a ray of light – and the hope of a brighter tomorrow – to the people living in her neighbourhood.

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

*One woman – and a tiny shack – in Khayelitsha, are bringing education and the hope of a brighter future to people living in this poverty-stricken township.*

## 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 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.

# Budget Basics

*D Edward Martin and Julie L Floch get to grips with how having a well planned budget pays off.*

For some non-profits, the annual budget-preparation time is a nightmare. It is a period of enormous stress and strain, as personnel at various levels of management strive to put together 'numbers' that hopefully will be valuable over the upcoming year.

All too often the financial budget becomes an end in itself. Just getting it finished is an accomplishment. What can be lost along the way is the roadmap that can help an entity use its resources in the most efficient, and sometimes most imaginative, ways possible.

Here are a few quick, basic rules to keep in mind when creating and using a budget:

1. Every organisation needs a budget, no matter how small its operation is;
2. Avoid needless detail;
3. Establish a process for comparing budgeted amounts to actual results;
4. Be flexible when applying the budget during the year; and,
5. Be prepared to look beyond the current year.

## **Every organisation needs a budget.**

Sometimes non-profit enterprises – smaller ones, in particular – do not take the time to formalise plans. It happens perhaps because it seems there just is not enough time. Or because the mission or goal is so clear to the governing board and its management that they believe it simply is not necessary. But, it is very necessary.

Without a formal budget, there is no blueprint for the organisation to follow, and there is a very real potential for overspending – or under-spending – both of which can have serious consequences.

## **Avoid needless detail.**

What is important is a final summary budget of a page or two, even if there are numerous supporting schedules, that may be used as the focal point for board approval and subsequent monitoring. Too often, final budgets for larger or more complicated entities wind up as page after page of inter-related revenue and expense data, which nobody can readily comprehend. The result is that a lot of hard work is wasted and meaningful information doesn't get the attention it should.

## **Compare budgeted amounts to actual results.**

For this to work as it should, the budget has to be structured in a way that can be compared to the actual information



accumulated in the accounting department, as quickly and easily as possible. That is often easier said than done. For this to work the budgeting and accounting processes must be linked in a compatible software package, or else the accounting records and the budget's revenue and expenditure line items may bear little relation to one another.

## **Be flexible.**

There is sometimes a reluctance to 'tinker' with a budget that the board has already approved. The non-profit's management must overcome that reluctance, make the revisions and submit a revised budget to the board. Budgets are, after all, just educated guesses as to what resources will be received and spent by an organisation, and there will always be various exceptions or variances from 'budget to actual.'

## **Look beyond the current year.**

Budgets for the upcoming year should always be assembled with an eye toward the future. Sometimes, it is worthwhile to start the next two or three years' budgets concurrently with the current year's.

Although they tend to be far less detailed than the current year's operating budgets, they provide a process for longer-range vision and projection, which can then result in different plans, and budgets, for the current year than might have otherwise resulted.

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*Adapted from  
The NonProfit Times  
April 2002*

# Your Website: Does it welcome prospective volunteers?

Your organisation's Website is the most effective recruitment tool at your disposal. Do visitors to your home page learn that volunteers are involved in any aspect of your work? Can they find information on the site about what volunteer positions are open and how to apply if they are interested?

## If not, why not?

Often prospective volunteers will go to your Website to learn more. Will a visit to your site continue the recruitment process or become a dead end with no information pertinent to these visitors?

## Start on your home page

The message you send begins on your home page. The home page should welcome all the diverse people you expect to visit your site and help them to find the facts they need.

By structuring this information in layers, the person who loses interest will exit, but the person who is really interested will read as much material as you supply.

When someone takes the time to click the button about volunteers on your home page, you are communicating with someone who wants more details. You should provide them with as much detail as possible.

Spend time thinking about the design of a specific space on the site for volunteer news and recruitment.

Organise the main page for volunteers with the following information:

- An introduction to volunteers at your organisation: why they are important, what they contribute, and who they are.
- What volunteers do: a list of volunteer position titles. If something tickles the visitor's interest, clicking on the title will reveal the full job description.
- Today's volunteer position openings: where you highlight current vacancies.
- How to apply. Explain the interviewing and screening process each applicant should expect, and provide an online application form that can be submitted via e-mail.
- Information for specific target audiences, such as community service ideas for students, corporate employee groups, faith community teams, etc.

## For membership development

There are different Website considerations if yours is an all-volunteer membership organisation.

Consider organising pages with the following topics of value to prospective members:

- Will we want you to become a member?;

- How getting more members will help your organisation to reach its goals or have an impact through projects;
- Express your wishes about finding people with specific skills, or clarify that all ages, both sexes, family groups, etc are all wanted (or not);
- What are the benefits of joining?;
- Share both the tangible (discounts) and intangible (friendship) perks; and,
- What is expected of new members?

If you want members to work as well as to 'join,' you should say so, with areas such as:

- The membership process;
- Explain the steps (and timetable) from expressing interest to becoming a full-fledged member. Post an online application form or the e-mail address of the membership chair; and,
- Want to test the water?

## Your Web contacts

Don't provide online application forms or e-mail addresses if you are not prepared to respond promptly. Netiquette requires fast response to electronic communication. Answer e-mails within 36 hours of receipt if at all possible. Once you've established contact online, you can then schedule a face-to-face meeting just as with any other volunteer applicant. The Web is a tool to allow prospects to find you. Once you have made contact, you can then put all your regular procedures into place.

Once you have created a volunteer-friendly Web site, let people know about it. Be sure to include your Web address on all stationery, brochures and newsletters, and mention that there is volunteering information on your Web site in all printed recruitment material. Why? Because most people go to Web sites because of something they have read on paper or been told by a friend, not because they were surfing the Web.

Finally, encourage applicants who telephone for an interview to check out the site before you meet. This will allow you to concentrate on learning about the prospective volunteer than on giving the facts about your organisation.

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*Are you making the most of your Website? If not, Susan J Ellis tells you how ...*

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*Adapted from  
Fund Raising Management  
July 2001*

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# The Good, the Bad and the Boring

*A mixed bag of current British fundraising campaigns, reviewed by Sheila McCallum.*

**W**ith the abundance of creative talent emanating from all the big London and Edinburgh advertising agencies, you'd expect UK fundraising campaigns to be marked by innovative ideas and brilliant marketing strategies ... and for the most part, you'd be disappointed.

Of course there are some glittering stars, truly brilliant ideas that must be bringing in millions, and deservedly so. There are also one or two unbelievable duds, from high profile organisations that should know better. But by and large, direct mail, print and television ads, either promoting non-profits or appealing for funds, are distinctly mediocre, to put it kindly.

For instance, the current *World Vision* Child Sponsorship self-mailer is pretty much identical to what the organisation was producing ten years ago. And OK, perhaps they are sticking with it for the very good reason that it still works. But one has to wonder if there are any prospective donors left who haven't already seen this one.

Then there is this newspaper ad for a local hospice based on a boring list of 'facts', headed by the news that the hospice is 25 years old and is an independent charity. Hardly the stuff to inspire you to reach for the cheque book! When you think of the uplifting stories of courage, and wonderful messages of support and comfort a hospice could draw on, it seems a wasted opportunity.

## Icon v. action

Another inexplicable decision was to base the Red Cross Week appeal solely around the symbolic logo – even to the extent (and expense) of producing three-dimensional collection boxes in the shape of the red cross.

Sure, it is a powerful and well-known icon. But earlier this year, the organisation ran a truly brilliant television commercial, using the most powerful and emotive images to illustrate their work ... Red Cross medical staff running through a war zone, carrying a wounded and bloodied soldier on a stretcher ... relief workers delivering sacks of grain to starving people in Africa ... a health worker cradling a newly inoculated baby. One has to wonder how much more successful Red Cross Week would have been, had this commercial been running concurrently.

## It gets worse!

Bottom of the list of recent campaigns has to

be the one for *Christian Aid* week.

On TV, radio and in the press the good people of Britain were bombarded with a series of hard-hitting messages and images urging them to 'forget' about the problems of the Third World and basically get on with their selfish, over-indulgent lifestyles. Heavy on irony and guilt, appeals like this are always in danger of backfiring. If this one worked, it would be because a lot of loyal *Christian Aid* donors gave in spite of, rather than as a result of, this campaign.

## The stars

Compare this to the television campaign run by the *National Canine Defence League* (NCDL), which has to be one of the most irresistible appeals ever conceived.



Featuring a lovable mutt who tells his own story (kicked out of the car and abandoned at the side of the road ... then rescued by the kind people at NCDL, who gave him something to eat and a warm place to sleep), Alfie then introduces some of his other friends: 'Della who was so upset when her owner died right in front of her', and so on.

'Like me, they need kind people to sponsor them, by giving just £1 a week. So if you want to sponsor a dog call the freephone number now. Oh listen everyone (all the dogs sit with pricked up ears), there's the phone ringing right now. Let's go and see who it is!'

No guilt. No hard-hitting tales of cruelty and neglect. Just a totally feel good ad that surely has millions reaching for the phone. And is a great confirmation for existing sponsors too.

*Parents for Children* relies on a simple yet sure-fire concept. In a series of press ads, the organisation features real case histories of children in need of a 'forever family', and invites inquiries from people interested in adopting or fostering such children. Proof, if we need it, that good direct response fundraising doesn't have to be expensive.

So there you have it – six of the best and worst in Britain today – and confirmation that good ideas are not restricted to big budget campaigns. ■



# How to make the most of your estate planning seminar

**E**state planning seminar' means you are going to die, which is the last thing people want to hear.' Close suggests referring to it as a 'philanthropic workshop':

1. Invite only 10 to 15 couples. Any more than that and it becomes a classroom environment. You can't give personal attention and adequate follow-up to any more than 15 couples at one time. If it's a close-knit group with a lot of participation, you will have half of them sold before the workshop is over.
2. Hold workshops more frequently. Rather than only one or two per year, hold five or six. Those five or six smaller workshops will yield more than one big workshop.
3. The invitation to attend has to come from the board. Your board members must be fully committed to a planned giving programme. If not, you can have the best estate planning seminar in the world and no one will come. Why? 'Leadership comes from leadership. People give to people and not causes,' says Close. Make your first philanthropic workshop attendees your board and their spouses. Then make each board member responsible for asking two couples to attend future workshops. Eventually you'll get attendees by word of mouth.

4. Work only with your top 10 percent of annual givers and those who give R1000 or more per year. A R1000 annual gift is an indication of a commitment. Also, invite your existing planned gift donors. Just because they have made a commitment doesn't mean they won't make another or increase their existing planned gift.
5. Follow up on RSVPs. A day or two before the workshop, call each couple who has agreed to attend and confirm their attendance.

Of the philanthropic workshops that Close has conducted for organisations, an average of 10 couples attend. Three to four of those couples are interested in taking the next step, he says, which is exploring how they can make a planned gift to the organisation. Of those three to four couples, half of them give a planned gift averaging \$350,000. Some give several million, he says. 'On average, each workshop should eventually generate at least \$700,000 in commitments to legacy gifts,' says Close.

Source: Geoffrey S. Close, *Certified Investment Management Analyst (CIMA)*, 1st VP, Senior Consultant with Morgan Stanley Investment Consultant Services, Clinton, NJ.  
Phone (908) 713-0776. E-mail: [geoffrey.close@morganstanley.com](mailto:geoffrey.close@morganstanley.com) ■

*Want to get people to your estate planning seminar? Then don't refer to it as an 'estate planning seminar', says Geoffrey S. Close, vice president and senior consultant with Morgan Stanley's investment consulting services.*

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*Adapted from  
Successful Fund Raising  
May 2002 Vol. No. 5*

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## Successful Fundraising Events

**T**his invaluable guide to organising winning and profitable fundraising events is the culmination of over 20 years of Jill Ritchie's voluntary and professional event fundraising, locally and abroad.

The book features more than 100 fun, innovative and novel ideas, and includes the 'how to' for each event – from planning, preparation and pitfalls, to potential, tips, hints and variations.

Many of the events described in the book are new to South Africa – and will provide you with a host of innovative ideas for your next fundraiser. Included are plans for



holding a wine tasting, telethon, potjiekos competition and a street party.

There are also guidelines on publicity, drawing up budgets, venue selection, catering, production and evaluation. Two computer disks of 'how to' checklists and events activity sheets are included with *Successful Fundraising Events*.

To order your copy of *Successful Fundraising Events*, simply complete

the form included in this issue of *Fundraising Forum*. ■

# Messages challenge donors to upgrade giving levels

**M**oving current supporters of your organisation into higher levels of support is an ongoing challenge. For those occasions in which you rely on personalised direct mail as a tool for moving donors to a higher level of giving, it helps to draft three or four ways to do so. Then review those methods to determine which is more compelling to the intended audience. Although you may not need to develop entire letters at this stage, it is useful to compare a handful of key messages that are most crucial to the 'ask.'

While the originality of your organisation and the services you provide will be key in articulating the exact message, here are three general illustrations aimed at convincing a donor to increase his/her gift over the previous year's contribution.

## **Example No. 1 - To maintain what's been accomplished previously**

[Name], I can't begin to tell you how grateful we are for the [amount of last year's gift] you contributed to [name of organisation] this past year. The cumulative support from individuals like you really helped make the following accomplishments possible ... (list several highlights/goals met.)

But [Name], I'm going to ask you to do even more this year, because it's going to require that everyone does more just to maintain the level of accomplishment that was realised this past year. Here's why ...

Specifically, I would like you to consider a gift of ...

## **Example No. 2 - To unleash the possibilities**

[Name], what you and others were able to

do for [name or organisation] this past year was phenomenal! Thanks to everyone's generosity, we were able to ....

But with individuals like you involved with and supporting our efforts, we're confident there's so much more that can be achieved. Need some examples? Consider these ...

I know these are lofty goals, but I'm sure you agree that they're worth the sacrifice. That's why I'm hopeful you will increase your previous year's gift of [amount] by 30 percent. Your gift of [proposed amount] will pave the way for ...

I and everyone associated with [name of organisation] are counting on you, [Name]. Please help us get there.

## **Example No 3 - It's a win for you and a win for us.**

[Name], last year you generously contributed [amount] to assist our efforts. And it really helped make a difference in the following ways ... (list several ways here.)

This year I want to extend a special invitation to join the [next giving club or level] by making a contribution of [amount]. By joining this distinctive group of donors, you will enjoy the following benefits ...

In addition to this, your increased gift will help us to (list specific or generalised goal) ... and that's a win for you and a win for us! ■

*Adapted from  
Successful Fund Raising  
March 2002 Vol. X No. 3*

## 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, church fundraising and bequest promotion programmes. In addition, Downes Murray International 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.

### **Durban**

Tel. (031) 207-3755

### **Johannesburg**

Tel. (011) 787-4884

### **Cape Town**

Tel. (021) 686-7090

### **Website**

www.dmi.co.za

## New face at Downes Murray International

**T**here's a new face and voice that'll greet you when you telephone or visit us – that of Natalie Trystman who has taken over reception duties from Joanne Crawley.

Natalie was born and raised in Durban, but has lived in provinces around the country. Having completed a Business Course at Pretoria College, Natalie also obtained a certificate in Office Etiquette and Entertainment. Natalie has worked in a

range of environments – including office and retail – but says she feels most at home in a corporate environment.

When not at the reception desk, Natalie enjoys visiting nature reserves and spends many weekends hiking with her family. ■



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