

'Leap of faith' pays off for Catholic Archdiocese of Durban



The tried and tested acquisition pack

Making the decision to increase annual acquisition mailings into the USA, UK and Ireland from 300 000 to over 1.3 million, is not something to be taken lightly. Nevertheless, after careful consideration, that is what the Catholic Archdiocese of Durban decided to do last year – and their investment paid off handsomely.

Despite the increased mailings accounting for an 87% rise in costs, the direct mail programme still brought in an additional R5 million net on the bottom line – excluding income from the December mailing which had not yet arrived at the time of printing.

In addition, 11 681 new donors have been added to the file so far, with this figure expected to rise to around 16 000 by the time the mailings are complete.

Of course, success like this doesn't just happen; it is the result of meticulous planning, testing, analysis, skillful list selection and carefully calculated risk.

Client Services Director of DMI, Emmi Albers, laid the groundwork for the campaign several years ago, when she noticed a trend in acquisition results for the Archdiocese Zulu Mission appeal. On her recommendation, concerted effort was put into developing new markets in Ireland. A database of Irish donors was built, which grew from 2000 to 20 000 at a lower cost per donor gained than was being achieved elsewhere.

Building on this success, Emmi began testing similar targeted lists in the UK and again saw pleasing growth in the donorbase – from 8 000 to 13 000. With the programme now exceeding budget, it was decided to increase investment in acquisition initiatives in the USA, and a series of mailings were planned for April, July, September, October and December.

Our instinct was to strike while the iron was hot, but with surface mail taking up to eight weeks to arrive overseas, the decision to go ahead had to be taken before results were known. However, Emmi's proven ability to accurately predict results gave Cardinal Napier and his team of financial advisors the confidence to go ahead.

In fact, our predictions were slightly out. The mailings achieved a cost per donor gained of half the agreed target – and this reduced cost impacted favourably on the overall income.

With an estimated 16 000 new names on the donor file, this year's direct mail programme should show considerable growth in net income. On top of this, there are implications also for the bequest programme. Five out of seven bequests received recently came from existing donors, pushing the average lifetime value of these donors to R2,2 million.

Not all non-profits have the budget to invest in large-scale acquisition mailings. The important thing is to mail smart ... adapt to changing markets ... test, analyse and apply what has been learned. ■

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New look website for DMI

Visitors to the DMI website (www.dmi.co.za) will now find lots more news, helpful links and a free jobseeker service – all aimed at helping local fundraisers find the resources they need. You can also download back issues of *Fundraising Forum* or subscribe online.

Please feel free to add your news, or contact us with comments and suggestions for making the site even more useful.



Now's the time to plan

I always devote the last week of my Christmas holiday to personal and business planning for the year ahead.

This year I included my three sons and a daughter-in-law-to-be by introducing them to the simple process of a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) followed by the development of Goals and Objectives, and finally, Action Plans.

As all three boys run their own small businesses, and as Bronwen is about to leave teaching Art and set out to establish a name and career as an artist, the timing was perfect. And the process, although it has been in use for many years, was a revelation to these young people.

So, with the new non-profit financial year about to begin in April – there's surely no better time than right now, for you to start planning. 'But I can't afford the time!' – I hear you cry. And the answer to that is 'You cannot afford

not to make the time.'

If you've never been part of a formal planning exercise before, you may need a facilitator to guide you through the process (I've listed a few at the end of this article). If you have a bit of experience or perhaps can't afford to hire someone to help, then here are a few very basic guidelines to get you started.

First Step: Do a SWOT analysis

Brainstorm and list all your organisation's: **Strengths.** What does your organisation do really well? What do you offer in your field that no one else does?

Weaknesses. What are the things holding you back from greater success or achievement? What is causing you the greatest problem?

Opportunities. What can you do to improve your service delivery, your income or your general effectiveness?

Threats. Usually things over which you have little or no control: reductions in State funding or the location of your business premises, for example.

Step Two: Identify your desired goals and objectives

A goal is a statement of an end result: 'Own our own building', 'Be able to accommodate and care for 150 more children each year'.

A word of caution: don't try to achieve more than three or four goals in any one period of planning. Prioritise if you end up with more.

An objective is a step towards the achievement of a goal and it must be measurable, time specific and realistic. For example, objectives towards the goal of a new building might be:

- Approach local Government for donation of land within two months.
- Find a company to train our community members as bricklayers by September.

Step Three: Develop action plans to achieve your goals

Expand your objectives into 'step by step' actions which spell out how you will reach the goal in the specified time frame.

Each action will be specific. Add two columns alongside the description of the action: 'Who' and 'By when'. Fill in the initials of the person responsible for the particular action in the first column and the date by which it should be completed in the next.

Always assign the overall responsibility for making it happen to just one person! Finally at the end of this step, do a test for 'reasonableness'. Looking across all the action

plans, check whether you have perhaps assigned too much responsibility to any one person within the same time period – and make the necessary adjustments.

At the end of this step you'll have a clear

way forward towards achieving the goals which you have set for yourself. There is one more vitally important step.

Step Four: Set dates and times for follow-up meetings

Control the situation and make sure your plans don't fall by the wayside by setting at least two (possibly three or more) follow-up meetings to check progress towards agreed action dates and to make the necessary adjustments.

May all your plans be successful, and if you need an incentive to get started, just remember the old saying: 'If you fail to plan, then plan to fail'.

If you need a facilitator for your SWOT analysis session, contact Jenni McLeod at Downes Murray International on (031) 207 3755, Colin Shepherd on (031) 209 9069 or bigsky@thinkingcentres.com, or Ms Lesley Schroeder at PR Africa (prafrika@saol.com). ■



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

'If you need an incentive to get started, just remember the old saying: If you fail to plan, then plan to fail.'

Milestone Thinking

On-Target Observations in brief

You create your opportunities by asking for them.

Patty Hansen
American Author

After soliciting donors with a phonathon, do you call them back with a thankathon? If you haven't tried it yet, you might be surprised at the results.

With acknowledgement to Successful Fund Raising Volume X, No 8

This much we all know to be true: regardless of how inspiring the writing or attractive the offer, if a direct mail package ends up in the wrong hands, it's doomed to fail.

With acknowledgement to Mal Warwick's Newsletter Number 55, July 2002

To build your donor list, make a commitment to send direct mail appeals to non-donors at least three times during the fiscal year.

With acknowledgement to Successful Fund Raising Volume X, No 7

Many potential donors are more comfortable with credit card payments than cash, and they are more likely to make a contribution or a purchase if you provide the credit card option. Plus, when you offer the card option, donors tend to be more generous.

With acknowledgement to NonProfit Times June 15, 2002

When you want money, don't bury the ask in a longer message with other items – it won't get enough attention.

With acknowledgement to Nick Allen in Mal Warwick's Newsletter September, 2002

Know that, come boom or recession, feast or famine, there will always be money for a worthwhile cause which is properly presented to potential donors.

With acknowledgement to Terry Murray



Giving wildlife a second chance

Unobtrusively nestled in the suburb of Durban's Yellowwood Park is the Centre for the Rehabilitation of Wildlife (CROW) – a haven for injured and orphaned wild animals.

Thousands of birds and mammals owe their freedom to CROW's caring staff and volunteers, who are dedicated to rehabilitating their 'patients' and returning them to the wild. This process often takes around eight months.

Around 60% of the wildlife casualties brought to CROW are a result of habitat destruction, as well as human cruelty and ignorance.

CROW has an Open Day once a month, when members of the public can visit the centre for an informative tour. Educational visits are also arranged for school children.

In addition to various enclosures, there's also a clinic and intensive care unit. Standing watch over critically ill animals on a 24-hour shift basis is not uncommon.

Monkeys, genets, buck, baboons, owls, storks, bushpigs, blue crane ... CROW is a beacon of hope to the many species that are taken there – most of whom would invariably face horrific suffering or death were it not for this centre's existence.

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

Sunshine, the Madagascan lemur, was nursed back to health and given a permanent home at CROW 10 years ago. She was illegally kept as a pet before being mutilated and left for dead.

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.

Mail more – or more often?



Is it better to mail larger or smaller quantities, less or more often? Susie Fought, senior consultant at Mal Warwick and Associates, looks at the pros and cons ...

Over the course of a year, is it more effective to mail fewer acquisition appeals of larger quantities – or to mail smaller quantities more often?

I'm actually testing this for one of my clients. In place of three acquisition mailings of 200 000 pieces each, we scheduled two mailings of 300 000. And we quickly ran into a problem.

We fell far short of the names needed to come out of the merge-purge with 300 000 names to mail. For this regional organisation, there simply weren't enough names. We didn't want to risk mailing 100 000+ names from marginal and test lists, so we mailed only 225 000 pieces. And we expect the same problem to arise on the second mailing at year-end.

My client will save money on printing and data processing costs. But we'll also acquire fewer donors this year, which will result in fewer subsequent Rands from appeal and renewal mailings.

What are the other pros and cons of mailing larger or smaller quantities, less or more often?

1. Universe limitations

My recent experience turned out to be a common one. In fact, one of my colleagues recalled mailing six or more acquisition efforts each year for a number of small clients – going back repeatedly to the same handful of lists that responded to the issue.

2. Testing

In order to gain reliable test results, mailing quantities should be large enough to include test panels of, at a minimum, 25 000 pieces. The larger the test panels, the more reliable the results – and the greater the risk. However, the larger the entire mailing is, the more package tests you can do in one mailing.

3. Risk reduction

If you schedule only one or two acquisition mailings within a year, you could run into a case of bad timing – such as September 11. In addition, by mailing more often, you can sometimes discover which times of the year are consistently more successful. Then you can bulk up on quantity for those mailings.

4. Spreading out the investment

Some non-profits simply don't have the cash flow to make a large investment. By mailing smaller quantities more often, you can spread the expense throughout the year.

5. Cost per thousand

If you handle direct mail production, you know that printing and other costs decrease per



piece in larger quantities. Some non-profits take advantage of this by mailing less often in larger quantities. Some print for the year to save money. And there are vendors who will offer prices based on annual quantities – even when you're printing and mailing four times over the course of the year.

6. Acting on test results

Mailing more than three times a year makes it difficult to act on test results in subsequent mailings. One of my colleagues addressed this problem by testing lists and package variations every other mailing. With four mailings, she still had six months to read and act on test results, rather than only three.

7. Timing

Some of my colleagues felt it was best to get as many new donors through the door at the beginning of the fiscal year – to allow ample time to solicit the second and third gift – and maximise revenue. Others felt a constant influx of new donors throughout the year was best, balancing the cost and revenue flow.

8. Keeping up with data entry

Many non-profits just don't have the resources to manage large quantities of data entry and donor acknowledgment. Mailing smaller quantities over the course of the year can be easier to manage on the back end. Or, you can outsource your gift processing! *Susie Fought is a senior consultant at Mal Warwick and Associates, 2550 Ninth Street # 103, Berkeley, CA 9471-2516. Telephone (510) 843-8888, fax (510) 843-0142. Web www.malwarwick.com, e-mail Susie@malwarwick.com*

*Adapted from
Mal Warwick's Newsletter
November 2002*

What's good and bad on the Web?

What makes a good website? It has less to do with attractive design than with functionality. Many pedestrian sites do their job very well, while their more glamorous counterparts irritate visitors with lengthy load times and confusing navigation tools.

Fundraising Forum visited five local non-profit sites and rated them on the things that really matter: how easy are they to find and navigate, download time, content and performance.

I Care

(www.icare.co.za)

This one is easy to find by simply typing icare.co.za into your browser's address bar. However, you may wonder if you are in the right place when the site loads, with its gloomy olive background and rather distant 'speak', somewhat at odds with the name. The dual identities – *LHC Foundation* and *I Care* are also a bit confusing.

On the plus side, the site is easy to navigate and has all the information you could want, with the added bonus of a search facility. I particularly liked the '40 ways to help a street child'.

Visitors can make direct donations by debit order but not credit card. There is no sign of a privacy/security policy, which is rather worrying for those who disclose their bank details – but some pages are still under construction so perhaps it is coming. Overall rating 7/10.

Cape of Good Hope SPCA

(www.sPCA-ct.co.za)

A well-constructed, appealing site that's quick to load, easy to navigate and no problem to find via search engine.

Impactful images of animals and a long list of interactive contents, make this site a pleasure to visit. Apart from information about the organisation, you can find tips on pet care, check out the *Mutt of the Year*, volunteer, join a bequest society, subscribe to a magazine, or make a donation.

The only reason this one doesn't score full points is that it has no online donation facility; instead one has to go through the cumbersome process of downloading a form, printing it out and mailing it back. However, the form does download with a second page – full of irresistible photographs – telling you exactly where your money goes. A good compromise. Overall rating 9/10.

Nelson Mandela Children's Fund

(www.mandela-children.com)

This is not easy to find, even with the help of a search engine, because there appear to be several different Nelson Mandela Children's Fund sites. This one was chosen for review because it claims to be the official website – but what a disappointment, it is!

From the flashing logo, buttons and pictures to the unwieldy system of frames that allow only one small area in the middle for content, the site is irritating rather than inspiring. Inexplicably there is no encouragement or opportunity to donate or get involved in any way with the project. Overall rating 3/10.

Leprosy Mission

(www.leprosymission.co.za)

Another attractive, informative and user-friendly site with a range of things to do – from ordering books, prayer diaries and calendars to comprehensive bequest information and an online credit card donation facility.

Unfortunately, choosing this option results in a rather off-putting warning about security. If there is a security problem, fix it – if not, get rid of the message.

There also appear to be a few technical gremlins, with error messages popping up and seemingly no way of making payment for items added to the shopping cart. Nor is there any evidence of a privacy policy.

However, the site scores extra points for offering a complete Afrikaans version! Overall rating 8/10.

Highway Hospice

(www.hospice.co.za)

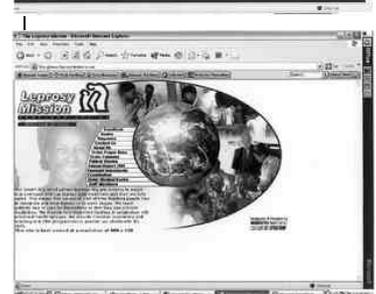
With a byline stating, 'We care', it would be nice to see some visual example of this, rather than the flowery design. Navigating the site is also irritating, as one has to keep returning to the home page to access the main menu.

I filled in the online donation form and clicked submit, but nothing happened. Then I tested the search facility – only to receive the message, 'there is no catalogue'.

Although the site has plenty of information to offer, all in all, it's a bit of a disappointment. Overall rating 5/10. ■



Local non-profit websites have come a long way over the past few years. Sheila McCallum reviews and rates a selection.



Is it time for your organisation to set up a credit card facility?



Ian Marr, co-owner of Direct Marketing Data, explains how you can set up a credit card facility for your organisation.

So you don't yet have the facilities to accept credit card donations?

Nowadays many donors prefer giving by credit card, and this might be the time to investigate your options when it comes to a credit card facility.

Benefits include security (you won't be handling cash or cheques), ease of banking (which is done automatically), and it's a far more convenient option for donors who want to make regular monthly gifts to your organisation.

Setting up with the bank

If you already have a credit card machine then you already have the merchant number you need.

The same number can be used – all you need is authorisation from your bank to change your method of processing.

For new installations, you'll have to apply to your bank for a merchant number, without a credit card machine. Certain banks have a minimum value per month which must be processed, so make sure you know beforehand what the amount is.

Once you have received your merchant number and authorisation, you'll need to forward these details to the relevant bureau or in-house facility who will be processing the data.

Credit card processing

Depending on how many credit card donations you receive, and the institution you are using to process them, the following processing options are available to you: daily, weekly, monthly, or a combination of all of these.

The database facility you use must be able to process the credit card donation, transmit, receive and update the donation histories of

donors on your file. Your system must also be able to report on accepted – and rejected – transactions.

Data bureau

Using a bureau to process your credit card donations ensures that – regardless of staffing problems – the process continues. Accuracy and validation of data is imperative for the credit card facility to work properly.

Certain bureaus insist on a minimum number of transactions per month. But if you take all the costs into account – the cost of a credit card machine and transaction charges – even 10 transactions a month are viable.

Another option is to use a bureau or programme which specialises in donor management, allowing you to manage all your donors and not just credit card donors.

Extracts

Your bureau or in-house system needs to extract the data for whatever period you are working with and transmit this data via a secure File Transfer Program (FTP) to the clearing bureau in Johannesburg. Within two to three hours this information will be processed and the results transmitted back via the same FTP.

Saving time and avoiding errors

Automating your credit card process will save time, and help you to cut down on errors – something your donors will appreciate! Another bonus is that you can generate a report to see which cards are about to expire ... so you can encourage donors to renew their support and sign another order to authorise monthly deductions from their credit card. ■

New book on tax benefits for charities

Tax Benefits for the Non-Profit Sector outlines in reader-friendly language, the financial benefits available to charitable organisations and donors. Durban-based author Hoosen Agjee guides readers through the otherwise daunting world of savings available to NGOs who are tax-exempt.

The book explains the benefits of having an NPO number and clarifies the requirements of the NPO Act in order to retain this valuable status. Specimen forms showing the procedures involved in applying for NPO numbers and tax exemption are included.

Also included are the tax benefits for donors, an overview of the Non-profit Organisations Act and a list of public benefit activities. To order *Tax Benefits for the Non-Profit Sector*, complete and return the enclosed form to Phambili Publishers, PO Box 371, Winklespruit, 4145.



Getting them back

Reacquiring lapsed donors differently

The old fundraising adage 'so acquired so renewed' is an effective but ho-hum way to acquire donors and to recapture those slacker-donors who have lapsed.

Non-profits reacquire lapsed donors through alternate methods and have developed many different strategies to combat donor fatigue and other reasons donors become disinterested in giving.

According to Geoffrey Peters, president and managing director at Crofton, Md.-based Creative Direct Marketing International (CDMI), using a different medium to renew lapsed donors from the one used to acquire them the first time is becoming more commonplace throughout the sector.

Peters said that the consensus among marketers is that using telemarketing to renew direct mail (lapsed) donors and vice versa is the new frontier in engaging donors who haven't given in a while.

Some non-profits lose track of their lapsed donors and simply do nothing about it. Doing that is a major *faux pas* in the direct response world.

Peters said, 'If you don't do anything else, put them back into your prospect mailing. Typically they outperform almost any list that you can get except maybe the very best swap lists.'

Lapsed?

There are a variety of definitions for lapsed donors and some practitioners would say that if a donor hasn't given in the last 10 minutes they are lapsed!

Peters explained that he's heard of some that go as far as 24+ months with no gifts, in lapsed files. He added that he tries to break lapsed donors down into segments. For example, a R20 donor might be lapsed for 12 months; a R50 giver may be in the lapsed file for 18 months; a R100+ contributor would be 24 months; and so forth depending on how far out you measure.

'It's a donor, who after some period of time defined by your organisation, is no longer valuable to re-market, who is then considered a lapsed donor,' said Peters.

Successful re-marketing of lapsed donors is obviously case specific, and Peters added that changing the entire copy, look and feel of a mail package geared to lapsed donors can be quite prosperous.

If they haven't seen the package before, they're more likely to respond, he added.



He continued, 'Coming up with new ideas prevents the file from getting old and helps renew lapsed donors. It's a more generic concept (than that), it's not specific to lapsed donors.'

If you find that the new package works on your donor file, test it on the lapsed donors because it's something that they haven't seen – because they have donor fatigue, according to Peters. 'They wear out if they see the same thing over and over again.'

One of the great motivators in direct mail is guilt. And the 'Why Have You Forgotten Us?' letter asking the lapsed donor why they haven't given to the cause in a year (or however long) is often successful.

That has rolled over into tele-marketing, Peters noted, adding that sometimes a phone call works better in recapturing lapsed givers.

Recapturing donors

Some alternative techniques for recapturing lapsed donors include:

- Develop a pre-lapsing programme that identifies people who are about to lapse and then treat that donor differently to rein them in before they become lapsed.
- Take donors who have lapsed that you have been unable to renew using the 'Why Have You Forgotten Us?' letter, and other mailings, and put them into prospect mailings. 'This is useful because you already own the names so at least you don't have to pay the list cost,' said Peters. ■

If you're not having success in recapturing lapsed donors, it may be time to try a new approach

*Adapted from
The NonProfit Times
September 2002*

Get the most from conferences you attend

Conferences are a great but sometimes costly way to get new ideas for advancement professionals.

These tips will help you get the most out of your next conference:

1. **Establish conference goals.** Decide what it is you hope to take away from the conference. Is there a specific topic you want to learn more about, issues you'd like to discuss with colleagues or exhibitor products you want to learn more about?

2. **Study the conference programme.** Compare your goals with the programme schedule and mark those sessions you need to attend to achieve your goals. Have a backup session in mind if your top choice is cancelled or filled to capacity.

3. **Make the most of each session.** Arrive early, take detailed notes and ask questions.

4. **Network, network, network.** Make a point to visit with other attendees at every

opportunity. Even if the conference doesn't meet your expectations, what you can learn from colleagues may more than make up for it. Exchange business cards and jot a note on the backs of those you receive to remind you of an idea they shared or a development function with which they were particularly knowledgeable.

5. **Follow up.** After the conference, review the notes you made on the backs of business cards and follow up asking for more information or samples or whatever. Don't hesitate to contact session presenters who you were unable to see, asking them if they would be willing to send you their handouts or presentation script. ■

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Conference dates for 2003

There are a host of exciting conferences coming up this year. Here are some of the highlights:

- Association of Fundraising Professionals, 40th International Conference on Fundraising, 23 – 26 March, Toronto, Canada, www.afptoronto.org
- 4th International Workshop on Resource Mobilisation, 5 – 8 May, Bangkok, Thailand, www.resource-alliance.org
- Institute of Fundraisers, National Fundraisers' Convention 2003, 7 – 9 July, Hilton Birmingham Metropole Hotel,

United Kingdom, www.institute-of-fundraising.org.uk

- National Catholic Development Conference, 28 September – 1 October, Los Angeles, California, www.ncdcusa.org
- 23rd International Fundraising Congress, 14 – 17 October, NH Leeuwenhorst Hotel, Netherlands, www.ifc-resource-alliance.org
- South African Institute of Fundraising Courses for 2003. Visit www.saifundraising.org.za for a full calendar of courses and events. ■

“Reprinted with acknowledgement to ...”

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

- The Grassroots Fundraising Journal, P O Box 11607, Berkeley, CA 94701 (6 issues – one year at \$39), e-mail: chardon@chardonpress.com, website: www.chardonpress.com or visit www.grassrootsfundraising.org
- The NonProfit Times, 190 Tamarack Circle, Skillman, NJ08558 (\$129 per annum), website: www.nptimes.com
- The Chronicle of Philanthropy, P O Box 1989, Marion, Ohio, 4335-1989 (24 issues – one year at \$95), website: <http://philanthropy.com>
- Successful Fund Raising, PO Box 4528, Sioux City, Iowa, 51104 (12 issues per annum \$149), website: www.stevensoninc.com
- Mal Warwick's Newsletter – Successful Direct Mail, Telephone and Online Fundraising. Strathmoor Press Inc, 2550 Ninth Street, Suite 1040, Berkeley, CA 94710-2516 (6 issues per annum \$79), website: www.malwarwick.com/newsletter

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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.

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