



Poll of US and Canadian donors reveals surprising trends

A recent survey of direct mail donors in the United States and Canada has yielded some interesting results. This report courtesy of Mal Warwick and Associates, Inc.

Would you have guessed that direct mail donors in the US give to an average of 14 charities?

Or that the scandals arising from the administration of donations to September 11 relief efforts did not cause direct mail donors to lose confidence in non-profits?

These are some of the surprising findings of a research study recently released by *Lang Research*, a Toronto polling firm. In the study, co-sponsored by *Mal Warwick & Associates* (Berkeley CA) and *The FLA Group* (Ottawa ON), researchers completed interviews with 1000 direct mail donors – 500 Canadian and 500 in the US.

Donors selected for the study from a total of 13 non-profits met the following criteria:

- They had given at least two gifts by mail during the last three years.
- They had never given single gifts of \$500 or more to the participating charities.
- They were not participating in either monthly giving or bequest programmes at those charities.

The study was undertaken primarily to probe direct mail donor attitudes about three strategies widely used to encourage upgrading: monthly giving, major donor gift clubs and bequest giving. The poll also compared Canadian and US donor demographics, attitudes and behaviour.

There were few surprises in the poll's demographic findings. In both countries, a majority of donors were well educated, overwhelmingly female, and retired, with no dependent children (by a ratio of 4:1).

Two out of every five are regular church-goers.

But not everything was as expected when comparing donors in the two countries. In the US about 55% of respondents were 65 years of age or older. In Canada, the comparable figure was 70% – a big enough difference to lead to the conclusion that, on balance, Canadian donors may be older than their US counterparts. Similarly, about 50% of US respondents were retired, compared with 70% of Canadians. And, while 10% of US donors had a high school education or less, that was true of 30% of Canadian donors.

Other findings of the survey include:

- Nearly one in four US donors reported total giving of \$5000 or more per year, compared to about one in eight Canadian donors.
- Overwhelming majorities of donors polled in both countries were familiar with monthly giving, major donor clubs and bequest giving. But far fewer donors thought these methods were a good idea.
- Findings suggest that the potential for the growth of bequest giving is huge. More than half the US donors polled either have included, or plan to include, a charity in their wills. In Canada, about one in three donors is a bequest prospect.
- Online giving is gathering steam in the US, but is lagging in Canada. About one in every six US respondents has given a charitable gift online, compared to about 3% in Canada.

Source: *Mal Warwick and Associates, Inc.*
Visit: www.malwarwick.com

n

INSIDE INFORMATION

Make type work for you.....	2
Philanthropy in focus	3
Win or bin?	4 & 5
Are you welcoming newcomers?	6
A perfect partnership.....	7
Are you recording the right information?.....	8

Jobs, classifieds, news and more – online

Have you visited the new-look *Downes Murray International* website?

When you do, you'll find an invaluable online resource for South Africa's non-profit community: an online jobseeker, for those seeking employment – and for organisations with positions to fill;

news; classifieds and more. You can also download previous – and current – issues of *Fundraising Forum*.

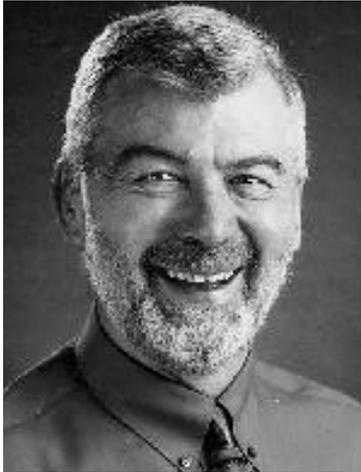
Please feel free to add your news, or contact us with comments and suggestions for making the site even more useful.

Visit www.dmi.co.za

n

Make type work for you

Good communication (with friends, donors or supporters) is all about words. Or is it? In print, if you want to truly communicate in a way which will be easily read and understood – and which your audience will



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

want to read – then there are many other considerations besides the words which you use.

One of the most important is the choice of typestyle. For decades, it's been an accepted norm that for body copy (a letter or the detailed type on your brochure or report) you should choose a serif typestyle (similar to the one in which this publication is set). A serif typestyle has those little 'feet' at the ends of most letters which do not appear on sans-serif styles (such as this).

Research proves that body copy set in a serif style is vastly more readable and better comprehended than sans serif.

Why should this be so? One reason is that serif typefaces make

the letters more distinct and therefore easier and quicker to distinguish.

Another possible reason is that we were mostly brought up on children's books – usually set in a serif style – and almost every newspaper, magazine and book you purchase uses a serif style for body copy.

But there's an alarming trend emerging which may have been started by the fact that on a small computer screen, a sans-serif face is sometimes easier to read, especially if the type is very small (9 point or less). I suspect that it's also a result of younger publication designers and advertising people who have never read the research, convincing themselves and their unsuspecting clients that a sans-serif face for body copy gives a cleaner, more modern look.

Recently a number of magazines have proudly announced 'design makeovers' by supposed experts, and the main switch has been to change the body copy to a sans-serif style.

One of South Africa's best known financial publications recently did just that, but fortunately reader complaints (and common sense) prevailed, and they very quickly switched back to a serif face.

But the choice of typestyle is not the only important aspect of good communication of the printed word – there are a number of other

common-sense rules that should be observed.

1. The size of the typeface for body copy.

Optimal body copy type (especially for a letter) is usually 12 point – particularly important when you consider that most of your donors are likely to be in older age groups and experiencing less than perfect sight.

2. Upper case versus lower case.

Colin Wheildon (author of *Type and Layout – How typography and design get your message across – or get in the way*) found that comprehension of text in lower case (with appropriate capitals of course) was 90% increased over text set entirely in CAPITALS.

3. Italics and bold type v. underlining.

For comprehension and good communication, using italics and bold type is preferable to the use of underlining, which tends to destroy the shape of the letters.

4. Reversed-out text.

Whilst graphic designers often love the concept, white lettering reversed out of a black

or coloured background makes for very poor visibility and comprehension. The same applies to that other trick which magazine designers love – body copy text super-imposed on a picture, or

text over a 'watermark' type illustration.

5. Use plenty of white space.

Don't overcrowd your page with small type if you want to be read and understood.

6. Choice of colour for body copy.

Black is obviously the first choice for clarity but dark blue is also easily recognised by the human eye – far more so than red or green.

7. Line length.

The optimum line length for readability is approximately 40–50 letters per line.

8. Left and right justification.

Recent research shows that a totally justified setting (left and right) increases comprehension levels dramatically.

Unfortunately *Type and Layout – How typography and design get your message across – or get in the way*, Colin Wheildon (Strathmoor Press, 1995, Berkeley California) is out of print. But you may be lucky enough to find a copy on the Internet. n

Your choice of typestyle is the most important aspect of good communication of the printed word

Milestone Thinking

On-Target Observations in brief

An online fundraising campaign is an excellent way to acquire new donors and build some buzz.

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

Avoid the tendency to use the pronouns we or us in an appeal letter. The appeal letter should be a one-on-one conversation between the person who signs the letter and its recipient. By using only I and you, your writing will convey the personal tone you seek.

*With acknowledgement to
Successful Fund Raising
Special Report – Writing that gets results*

While recapturing lapsed donors can be a solid source of support, experts caution that the best strategy for charities is not to let donors fade away in the first place.

*With acknowledgement to
The Chronicle of Philanthropy
May 16, 2002*

Be brave enough to live life creatively. The creative is the place where no one else has ever been. You have to leave the city of your comfort and go into the wilderness of your intuition. You can't get there by bus, only by hard work and risk and by not quite knowing what you're doing. What you'll discover will be wonderful. What you'll discover will be yourself.

*Alan Alda
American actor*

Collecting e-mail (addresses) isn't enough. Organisations must use them. People who give e-mail (addresses) through a direct mail response show an obvious interest in electronic communication.

*With acknowledgement to
The NonProfit Times
January 15, 2003*

For those times when you have to do the asking: know that you should have a specific amount in mind and know when to keep quiet after you have made the request.

*With acknowledgement to
Terry Murray*



Treating the tragic face of an age-old illness

Dating back to Biblical times, leprosy is one of mankind's oldest and most reviled diseases – and one which, contrary to popular belief, is still very much a part of our twenty-first century.

More than 600 000 new cases of the disease were detected worldwide in 2001 – predominantly in Africa and Asia. However, the prognosis for people affected by leprosy is very different nowadays.

Nearly thirty years ago, when *The Leprosy Mission* was founded, there was no cure for the disease. The organisation could do little more than offer care and compassion to an unloved, 'untouchable' people. Today, with multidrug therapy, leprosy patients can be cured within 24 months.

However, in rural areas far from medical help, people affected by leprosy are often not diagnosed for months, or even years. In that time, permanent nerve damage can occur, leading to disfigurement and disability.

Fieldworkers of *The Leprosy Mission* travel deep into these areas, identifying and educating patients, administering treatment, challenging the stigma of the disease and providing ongoing rehabilitation, care and vocational training for those who have been permanently disabled as a result of leprosy.

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

Over 3000 South Africans are living with leprosy. Those who are promptly diagnosed and treated can recover fully – but in rural areas with limited access to medical help, the disease may go untreated for years, causing permanent damage and disability.

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.



Win or bin – how will donors react to your next appeal?



Introducing a regular new feature in which we evaluate local direct response ads, mail packs, annual reports, leaflets and websites. Sheila McCallum reports.

Readers are invited to submit their work for critical analysis by our panel of experts. Even if your work is not selected for publication in Fundraising Forum, we will respond to every submission.

Since direct response press advertisements typically produce an unacceptably low return on investment for non-profits in this country, examples of fundraising ads are few and far between. So it was a bit of a surprise to come across not one, but two, large and impactful ads for non-profits in the *Business Report* of February 28.

Impact aside, I found the advertisement for the *Sunshine Centre Association* quite offensive. 'We're trying to help the mentally disabled,' the headline reads, 'But you're a bit slow.' Hmmmm, thank you for that. Now that you've insulted me, you want me to do what? Send a donation? I don't think so!

Much better was the one for the *St John Ambulance Foundation*, with its curiosity-provoking headline and simple message. Even so, I would be greatly surprised if more than a handful of people took the trouble to phone the contact number and make a donation. A picture of Josef Mabusu might have made the appeal more believable, but motivating people to give through an ad like this is still a huge challenge. [Perhaps *St John Ambulance Foundation* would care to share the results of this campaign with *Forum* readers?]

Love in the mail

A surfeit of pink and red hearts on *The Salvation Army* Valentine's Day appeal tended to trivialise the message and hamper readability. Full marks, however, for the idea: have a happy Valentine's Day and remember the importance of love and caring – not only for the special people in your life – but for those who are lonely and forgotten.

The appeal comprised a C6 window outer envelope, A5 Valentine card, reply form and return

envelope, all of which suffered the same overabundant heart design. Also included in the pack was a self-adhesive sticker to show your willingness to 'wear your heart on your sleeve' for the *Salvation Army*. A brave attempt at an involvement device that didn't quite come off.

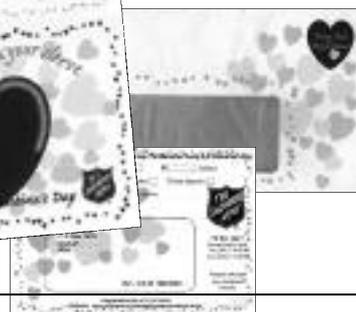
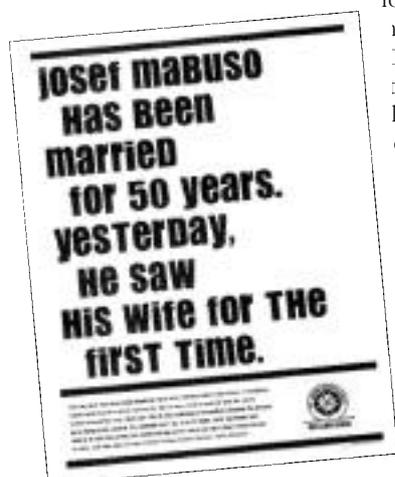
Cotlands Baby Sanctuary is a well known and popular organisation, especially in the Gauteng area, and their latest newsletter [September 2002] does an adequate job of reporting back to donors and keeping interest alive, with a variety of case histories and news items. Pity about the poor picture quality though, and the rather odd-shaped blocks of design.

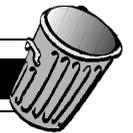
Included with the A3 two-colour newsletter was a donation form, a peculiarly small BRE and, inexplicably, a meal 'voucher' for BJ's The Bridge restaurant, good for a R2,50 donation to *Cotlands* on meals purchased to the value of R25. A rather tacky touch and hardly worth the effort, I would have thought.

Scratch this award winner

The Sappi 'Ideas that Matter' initiative makes funds available to non-profits for creative campaigns that 'exploit the power of ideas on paper'. Disappointingly, the *Community Chest* leaflet-cum-postcard, which was a recent recipient of the Sappi grant, starts off with a good idea but fails to capitalise on it.

The front of the leaflet features a photograph of a solemn-looking child. One is invited to scratch off the lower part of the face with a coin, to reveal a big smile. So far, so good. You open the leaflet to read the headline, 'See how little it takes to make a difference', together with a message urging





Win or bin (continued)

you to contribute to the Community Chest.

Then the idea fizzles out into a toll-free telephone number to call or a postcard to return requesting further information. Coupled with a recurring misplaced apostrophe on the plural of the organisation's name, one gets the impression that not quite enough thought went into following the whole thing through.

No need for gimmicks

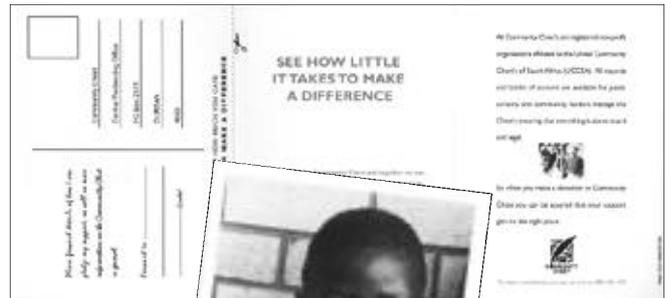
In contrast, the latest *City Mission* Annual Report goes the plain and straightforward route with great success. Printed in a single colour (dark brown) on ordinary bond, this no-frills piece strikes the right note for a welfare organisation – while still managing to enthuse and inspire with its impressive list of projects, supported by somewhat murky photographs.

What a pity the organisation neglected to include a covering letter, or some kind of response device. If donors received the mailing, many would, I'm sure, have been tempted to renew their support there and then.

So many mistakes!

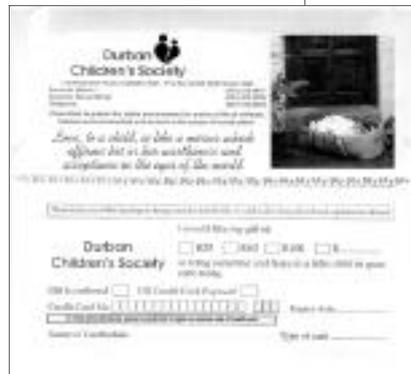
From the insipid outer envelope to the 'so what?' statement which kicks off the letter (1 December is World Aids Day), the *Durban Children's Society* Christmas appeal goes from one missed opportunity to the next.

What could be more emotive than Aids orphans and sick babies? What could be more appealing than the picture of Cindi? Instead, the baby and the copy fight for attention, the copy glosses over the case history and the whole thing leaves one curiously unmoved.



Enclosed with the A4 appeal letter was a deep flap response envelope, which failed to carry through any reference to Aids, but went more on the abandoned theme.

Despite the poor package, however, this cause is probably strong enough to attract donations regardless – but it might have done much better, with just a few inexpensive improvements.



You are here ... Are you welcoming newcomers?



Susan J Ellis, president of Philadelphia-based training, publishing and consulting firm specialising in volunteerism – Energize Inc – takes a look at how you should make your volunteers feel at home.

One of the nice things about taking action to support volunteers is that there's often a ripple effect that benefits other constituents, too.

People considering becoming volunteers and new recruits need to be welcomed into the organisation. By assuring that these newcomers feel comfortable, you end up with an environment pleasing to clients and staff.

What do people see and sense when they enter your building? Is the front entrance institutional or home-like? Is the front sterile, or does it convey lots of activity taking place inside? How clearly is it marked with signs so people can immediately know where to go?

Once a newcomer has reached your door, is the entranceway inviting or formidable? If there is a receptionist, how long does it take for the person to greet someone upon arrival and what words are used to say hello? Maybe a business-like approach is efficient, but it is not truly friendly. Also, what other business is conducted at the front desk? Does the need to greet feel like an interruption of work?

Welcoming

Waiting rooms are opportunities to communicate. What is on the walls? Do pictures or framed documents reflect the tone the organisation wants to convey? Is everything formal or is there a sense of fun?

The answers to these questions may highlight, at worst, that you have been inadvertently offering a negative introduction to your organisation. More likely, you'll discover missed opportunities to create a welcoming environment.

Many organisations provide formal orientation sessions to welcome new volunteers. These are excellent, but they may not be scheduled to coincide with the volunteer's actual starting date. Here are a number of ways newcomers can be brought on board effectively. And, many of these ideas might also be helpful to paid staff and even clients:

- Introductions to staff and other volunteers are usually done informally. But you could consider a noticeboard with photographs, full names spelled out, and titles. This reminds people of names, makes long-timers aware of new staff members, and helps everyone spell names correctly.
- Provide a place for volunteers to store personal items securely while on site – and

show this right away.

- If there is a coffee/tea area, explain whether it costs anything, if they should bring their own mug, etc. This small gesture shows volunteers that they're part of the team.
- Provide a glossary of jargon and acronyms which volunteers may hear constantly. This can also be displayed on the noticeboard.

Effort

Just as important as the first day at work for new volunteers are the second and third days. It's not enough to make an extra effort only on day one. It takes longer than that to learn the ropes and get acquainted with a whole new group of co-workers.

Pay attention over the first few weeks to see if the newcomer seems comfortable and at ease. This is where the buddy system can be helpful. Not only does the new volunteer get some personal attention, but the veteran volunteer you ask to be the buddy feels recognised, too.

Again, many organisations provide wonderful training for volunteers, often in an intense, classroom format. Yet much of what a newcomer needs as soon as possible is not skill-building, but good instructions. This is particularly true for simple things that are not intuitive. For example:

- How do the telephones work? How do you get an outside line or transfer calls?
- How do the copy and fax machines, and other office equipment work?

Finally, the way a newcomer feels about the first few times on site is also affected by what happens – or doesn't – as the person leaves the building. Everyone may say hello; but who says goodbye?

Develop a culture of saying goodbye whenever possible, coupled with 'so glad you could help us today,' or some other pleasantry.

Thank you

You could also place a big sign next to the noticeboard saying something like: 'Thank you for volunteering today! Hope you had a great shift. Travel safe and come back to us soon.' Change the sign periodically to reflect holidays or other events. A sign that is brittle from age belies its sincerity.

Maybe it wouldn't hurt to think about what a client sees or hears when walking out the door. Leave a warm and caring impression with everyone.

E-mail susan@energizeinc.com or visit www.energizeinc.com

*Adapted from
The NonProfit Times
January 1, 2003*

A perfect partnership

Considering the value of PR in the fundraising mix

If people get that bewildered, glassy-eyed expression and ask 'Who?' when they hear your organisation's name, it's time to come out of hiding and give yourself a presence.

If you have loads of funding and don't require another cent, then by all means, remain an invisible force for good.

But if you need money to continue your excellent work yet remain hampered by a low (or non-existent) profile, then you may want to consider public relations (PR). It's one way to establish visibility and credibility in the public's eyes.

But before we go any further, it's wise to remember what PR is *not* ...

Rule One is *'Thou shalt not expect PR to perform miracles.'*

PR is not a prescription or panacea for poor management. If you're having internal problems which adversely affect relations with donors; if your non-profit is riddled with politics; if your Board or staff are not performing ... you don't need PR, you need to pull up your socks.

Rule Two: *'Thou shalt not see PR as a goldmine.'*

PR may well boost your fundraising efforts, but its chief task is not prospecting. It primarily builds and nurtures relationships and facilitates healthy communication and mutual understanding – which are all beneficial to raising funds – but don't expect to cash in with PR if your fundraising tactics are not up to scratch.

Lastly, Rule Three: *'Thou shalt not abuse your contacts.'*

Whether it's journalists, suppliers or brand managers you've enticed into supporting your organisation, nurturing your contacts is key to retaining their interest. Journalists want *news* – or at least a new angle on a not-so-new story – so know what they want and give it to them.

Chris Skinner, former Chairman of the Public Relations Institute of South Africa (PRISA), KwaZulu-Natal Central, stresses that PR is about image and reputation. 'Support for your organisation depends on communication, confidence and credibility.'

'Without good communication, no one will know about your organisation. People must have confidence in who you are and what you stand for – and they must believe in what you are doing, and that you are the right organisation to support for the job.'



Because an integrated approach to fundraising is key, ensure that your PR and fundraising programmes work hand-in-hand. This should be discussed at strategic planning sessions and carried through in the organisation's day-to-day operations.

When publicity campaigns are being undertaken and your name or cause is high profile, capitalise on this and follow through with appropriate fundraising measures. Unless your PR and fundraising people are communicating and planning together, it could be wasted effort.

In organisations where departments work in isolation, communication often becomes a casualty of this arrangement. Independent departments can also give rise to an unhealthy competitive environment, which is counter-productive.

So, what's the answer? Let your PR and fundraising people work in sync, so the organisation receives the full benefit of their combined efforts.

Have your house in order. Make responsibilities clear. Expect excellent internal communication. Encourage innovation. Be available. Be open.

Because it's not only about fundraising – it's about friend-raising, too.

** In our next issue, we'll take a look at PR tips for non-profits.*



Public relations can work wonders for a non-profit, reports Downes Murray International copywriter and former PRO, Marisol Gutierrez. And when it works in sync with fundraising, it's the perfect partnership.

n

Are you recording the right information?

For any non-profit raising money by mail, phone or e-mail, its donor list is one of the group's most valuable assets.

Donors are people, and there's an almost infinite number of details you can mention about any person. So what information about your donors should be recorded in your mailing list?

As lead database programmer, I help my firm's clients consider the things they can say about their donors and decide which should be coded in the donor's database record – and which, perhaps, should not.

Standard codes

We have standard codes which make sense for all our clients. If a donor has requested not to receive phone calls, or that her name not be exchanged, it's crucial that those requests be honoured and coded in an obvious way on the donor list.

Beyond these type of items, we work with each client to decide what else is useful.

Several years ago, one of our clients had a very detail-oriented Development Director whom I'll call Mr X. Mr X wanted to closely control what sorts of mailings each donor might receive. He designed an elaborate coding system and assured us he would take care of all the details.

This included requesting certain codes be added to certain records and making sure that each mailing suppressed donors with particular codes, or included donors with other codes.

For a while everything worked. Mr X managed all the details, as promised. Eventually, though, he went on to other opportunities. Of course, his responsibilities included more than overseeing the donor coding, and there wasn't time to train his replacement (call her Ms Y) in depth.

Ms Y soon came to visit our offices, and we spent hours trying to straighten things out. Code 'B' meant a person was on the 'Blather List'. What did that mean? Mr X had not shared his reasoning with us, and it hadn't been mentioned in Ms Y's training. Code 'F' meant a personal friend of Mr X. There were 10 of them on a 75 000 name file.

It took more than one meeting, but eventually Ms Y trusted us enough to let us

help her cut through the underbrush and create a comprehensible coding system that covered the information actually used.

Good candidates for donor-list coding are items that directly impact what sort of appeals – mail and phone – the donor should receive.

If you send out a regular newsletter, you should probably code a donor's newsletter preference separately from whether she wants to receive appeals through the mail.

Redundant codes usually don't make sense. Why have a code indicating a High-Rand donor, when you should be able to see quickly the actual amount of her highest previous contribution? Nonetheless, sometimes special codes are appropriate. For example, if you routinely select or suppress donors for a mailing based on whether they're direct mail donors or event-only donors, it can be convenient to have a code on the master record for quick reference.

If a code applies to only a dozen people on a mailing list of tens of thousands of names, reconsider the use of that code. If one of your codes indicates 'vendor', perhaps those names shouldn't be on your fundraising database at all, but instead in a smaller vendor list.

Exceptions

There can be good reasons for exceptions to these guidelines. But make those exceptions only after thinking through why they should be made – under what circumstances that information will be useful, and what the implications will be if another person should take over and need to work with the information.

Then the chances are good you'll have a system that's useful, understandable and efficient.

Source: Margo Nelson, Chief Programmer at Response Management Technologies, Inc., 2250 Ninth Street, Suite 103, Berkeley CA 94710-2516, phone (510) 843-8180, fax (510) 843-8020, e-mail margo@respmtg.com. With acknowledgement to Mal Warwick's Newsletter, Number 55, July 2002. Visit www.malwarwick.com

n

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

Downes Murray International

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

We offer feasibility studies, strategic planning workshops, direct mail fundraising, mail/phone, corporate and capital fundraising campaigns, 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

E-mail

dmi@iafrica.com

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

The Editor
Fundraising Forum
P O Box 3455
Durban
4000

e-mail: forum@dmi.co.za

Visit www.dmi.co.za
for news, jobs, classifieds and more!