FUNDRAISING FOR CHRISTIAN NON-PROFIT ORGANIZATIONS

BY

ELEANOR WEIDEMAN

THESIS PRESENTED IN PARTIAL FULFILMENT OF THE REQUIREMENTS
FOR THE DEGREE OF

MAGISTER COMMERCE (BUSINESS MANAGEMENT)

IN THE DEPARTEMENT OF BUSINESS MANAGEMENT
AT THE UNIVERSITY OF STELLENBOSCH

PROMOTOR: PROFESSOR PG DU PLESSIS

DECEMBER 1999
STELLENBOSCH

II

DECLARATION

I the undersigned, hereby declare that the work contained in this thesis is my own original work and that I have not previously submitted it in its entirety or in part at any university for a degree.

ELEANOR WEIDEMAN

12\10\99
DATE

i SUMMARY

Before starting out on how fundraising should be done, it is important to understand the history of Christian fundraising. In the field there are two opposite poles of thought: Those who say organizations should never request donations and those who say that organizations should.

Christian organizations in South Africa are often viewed by outsiders (as well as those working within these organizations), as unprofessional in their fundraising efforts. Proper planning for the organization as a whole and in particular for its fundraising efforts is not done. If this is the case and an organization is not effective in its fundraising, the organization is doomed to failure because funds will not be forthcoming to do the work.

In preparing for fundraising the most important aspect is effective planning. Experience have shown that, although most Christian organizations do day-to-day planning (and plan how the donations received will be spent on the work being done), very little time is devoted to future plans. The organization also needs to embark on an encompassing strategic planning exercise, which differs from planning in scope, importance, resource commitment, time frame and purpose.

After preparing for fundraising the fundraiser must determine the sources of revenue. It is a misconception that the buildings, personnel and programmes of an organization constitute an organization. Those whom the organization serves are the heart of the organization and it exists only because of them.

From a Christian organization point of view, it is logical to assume that if a Christian organization's primary goal is evangelism and missionwork, its constituency is already narrowed down to mostly Christians. Only after the constituency has been identified can the organization identify sources of revenue within their constituency. For most organizations there are three sources of revenue: Individuals, corporations and trusts, of which individuals are by far the largest source of revenue for Christian organizations.

If the fundraiser does not know how to cultivate those sources the organization will keep on struggling or even worse, it will not succeed. This is where many Christian

organizations fail. They do not believe that methods used in business can also apply to Christian organizations. In fact many of them go so far as to say that these methods of fundraising are wrong and un-biblical.

Methods that can be used successfully within Christian organizations to solicit funds from individuals are relationship fundraising and personal support raising. On the other hand, the other method is applicable to obtaining revenue from a variety of sources: Special events, where many different sources are utilized to make the event a success. These three methods are probably the methods most used in Christian organizations.

It is imperative that the organization realizes that the diversity of funding is the secret of financial stability. To be successful the organization needs broad-based, diversified fundraising, in other words, it needs to utilize all possible methods available – keeping in mind its Christian roots.

Other methods discussed, to solicit funds from corporations and trusts and how to do capital fundraising, are technical and the organization may need professional help to make a success of it. Corporate and trust fundraising are methods that are source-specific, and which can be used only for a specific source while a capital campaign solicits funds from a variety of sources.

In all these methods the strategic plan and in particular the case statement of the organization is very important. Without those tools these methods can not be used with success.

To be successful in these methods creative writing is a seminal aspect of fundraising, as it is needed in nearly every aspect. Without creative writing skills the organization is unable to communicate effectively and this has an inevitable impact on success rations.

For Christian organizations doing fundraising in an environment where many secular organizations use every means at their disposal to raise funds, no matter what the cost, it is sometimes difficult to make the right choices. Ethical decision-making goes much further that just what is legal. It goes beyond the enforceable. It is a moral and religious issue that needs to be addressed.

Finally, it is important to mention that the organization that is serious about fundraising, has to create an environment that is both professional and positive.

The empirical analysis aims to highlight implications of the findings of the study done on Christian organizations and the fundraising done within their organizations. If problem areas are highlighted these organizations can deal with it and improve their professionalism - and thereby their successes.

II OPSOMMING

Voordat verduidelik word hoe fondsinsameling gedoen behoort te word, is dit belangrik om die geskiedenis van Christelike fondsinsameling te verstaan. Op die gebied is daar twee teenstrydige pole van gevoelens: Diegene wat sê dat organisasies nooit behoort te vra vir skenkings nie en diegene wat voel dat organisasies behoort te vra vir skenkings.

Buitestaanders (én diegene wat in die Christelike organisasies werk) voel dikwels dat Christelike organisasies in Suid-Afrika onprofessioneel te werk gaan in hulle fondsinsamelingsveldtogte. As dit wel die geval is en 'n organisasie doen nie die fondsinsameling doeltreffend nie, sal die organisasie faal omdat daar nie enige fondse verkry sal word om die werk te doen nie.

Doeltreffende beplanning is die belangrikste aspek wanneer voorberei word vir fondsinsameling. Ervaring het getoon dat daar baie min tyd bestee word aan toekomsbeplanning, hoewel Christelike organisasies wel gewone dagbeplanning doen (en beplan hoe die skenkings wat ontvang word, bestee gaan word aan die werk wat gedoen word).

Na die voorbereiding vir die fondsinsamelingsveldtog, moet die fondsinsamelaar bepaal waar die geld vandaan gaan kom. Dit is 'n wanopvatting om te dink dat 'n organisasie bestaan uit die geboue, personeel en programme van 'n organisasie. Diegene wat deur die organisasie bedien word, vorm die hart daarvan omdat dit eintlik net bestaan omdat hulle daar is.

Uit 'n Christelike oogpunt, is dit logies om te veronderstel dat die donateurs, lede, medewerkers en ander belanghebbendes se samestelling hoofsaaklik op Christene berus, omdat 'n Christelike organisasie se belangrikste oogmerke gewoonlik evangelisasie en sendingwerk is. Die organisasie kan egter net besluit waar die inkomste vandaan gaan kom as hulle weet hoe die samestelling van die medewerkers, lede en ander belanghebbendes werklik lyk. Vir die meeste organisasies is daar drie bronne van inkomste: individue, korporasies en trusts, waarvan individue verreweg die grootste bron van inkomste is vir Christelike organisasies.

As die fondsinsamelaar nie weet hoe om die hulpbronne te ontgin nie, sal die organisasie aanhou sukkel, of erger nog, nie sukses behaal nie. Dit is waar baie Christelike organisasies faal. Hulle glo nie dat die metodes wat in sake-ondernemings gebruik word ook van toepassing kan wees op Christelike organisasies nie. Om die waarheid te sê, gaan baie van hulle so ver om te voel dat die metodes van fondsinsameling verkeerd en on-Bybels is.

Metodes wat suksesvol in Christelike organisasies gebruik word om fondse van individue te ontvang, is veral metodes wat berus op verhoudings en persoonlike ondersteuning. Nog 'n metode is om inkomste te verkry vanuit verskillende bronne: spesiale gebeure waar heelwat verskillende bronne benut word om 'n sukses te maak van die geleentheid. Die drie metodes word waarskynlik meestal gebruik deur Christelike organisasies.

Dit is van die uiterste belang dat organisasies besef dat die geheim van finansiële stabiliteit 'n diverse bron van fondse is. Om sukses te behaal, moet die organisasie 'n breë basis en gediversifiseerde fondsinsameling benut. Dit beteken dat al die moontlike, beskikbare, metodes benut moet word - terwyl die Christelike grondslag nooit buite rekening gelaat word nie.

Ander metodes wat bespreek word, om fondse te verkry van besighede en trusts en hoe om kapitaal te genereer, is van tegniese aard en die organisasie sal waarskynlik professionele hulp nodig hê om dit suksesvol te kan doen. Fondsinsameling by korporatiewe ondernemings en trusts hou spesifiek verband met die bron en dit kan net benut word vir 'n bepaalde bron terwyl 'n veldtog fondse insamel vanuit verskeie bronne.

By al die metodes is die strategiese plan, veral die beplanning vir 'n bepaalde projek, uiters belangrik vir die organisasie. Sonder die gereedskap, kan die metodes nie suksesvol toegepas word nie.

Om sukses te behaal met die metodes, is 'n kreatiewe skryfvermoë, 'n indringende faset van fondsinsameling omdat dit nodig is vir feitlik elke enkele aspek van die insamelingspogings. Sonder kreatiewe skryfvaardighede, kan die organisasie nie doeltreffend kommunikeer nie en dit het 'n daadwerklike invloed op die sukses wat behaal word.

Vir Christelike organisasies wat fondse insamel in 'n omgewing waar baie sekulêre organisasies elke enkele middel tot hul beskikking aanwend om fondse te verkry, ongeag die koste, is dit soms moeilik om reg te kies. Etiese besluite gaan baie verder as blote besluite op grond van die reg. Dit strek verder as die afdwingbare. Dit is 'n morele en religieuse saak wat aandag moet geniet.

Laastens, is dit baie belangrik om te noem dat organisasies wat ernstig is oor fondsinsameling, 'n omgewing moet skep wat positief en professioneel is.

Die empiriese ontleding is daarop gerig om die implikasies van die bevindinge van die navorsing oor Christelike organisasies en die fondsinsamelings in die organisasies uit te lig. As daar probleemgebiede genoem word, kan die organisasies iets daaraan doen en hulle professionalisme verbeter - om so meer sukses te behaal.

III DEDICATION

This thesis is dedicated to my parents

X

IV ACKNOWLEDGEMENTS

I want to thank the following:

Prof PG du Plessis my promotor.

Mr J Bloom for his help.

Dr T deW Kotze.

Prof D Adey and Mrs E Belcher for their excellent editing.

Adriaan Joubert and Johann Smith for the technical help.

My friends in the fundraising field, especially Graham Wood, Francois Cilliers, Carl Swart and all the staff at Downes Murray International.

Hester, Lynnette, Kathleen, Hettie and Chris for their support.

Everybody at the Christian Seaman's Organisation, in particular Dr Dreyer.

My parents for believing in me.

My Saviour, Jesus Christ.

V TABLE OF CONTENTS

VI LIST OF FIGURES AND TABLES

1. A BRIEF HISTORICAL PERSPECTIVE ON CHRISTIAN FUNDRAISING

1.1 INTRODUCTION

Before starting out on how fundraising should be done, it is important to understand the history of Christian fundraising. In the field there are two opposite poles of thought: Those who say organizations should never request donations and those who say that organizations should. This chapter is not a detailed account of the history of fundraising; nor is it a theological exegesis. It is important to note that the approach in this chapter as well as the thesis as a whole is Christian rather than theological, although advice was sought from theologians for the sections on Biblical contents.

It is important to note that money is frequently discussed in the Bible, in fact more that any other subject. Sixteen of the thirty-eight parables in the New Testament deal with the utilisation of money (ex. Luke 12:13-21). One out of every ten verses in the Gospels (New Testament) deal directly with money (ex Mark 10:21, 12:17) and more than two thousand verses in the Bible (Old and New Testament) deal with money and possessions. It is an important subject in the Bible.

Christian fundraising is connected to the word stewardship. The Biblical word for stewardship (*oikonomia)* is a combination of the Greek words *oikos* (house, dwelling) and *nomos* (law, principle). This literally means "management of a household (Kohl, 1994:9). The same meaning is attached to Christian fundraising in general as well as fundraising in Christian organizations. This definition is applicable throughout this study.

This chapter gives a brief historical perspective on the very important subject of Christian fundraising through the ages.

1.2 HISTORY OF CHRISTIAN FUNDRAISING

1.2.1 Old Testament

The Old Testament makes it clear that everything in the universe belongs to God. This includes everything man has and owns. (Ps. 24:1; Job 41:2). Man is dependent on God for everything. Deut. 8:17,18 states: "So then, you must never think that you have made yourselves wealthy by your own power and strength. Remember that it is the Lord your God who gives you the power to become rich."

Man is the manager or steward of God's property and is responsible for it. In the Old Testament, tithing was a kind of taxation and was used to maintain the temple as well as priests and levites - the caretakers - that worked in the temple, to honour God and to help widows, orphans and the poor. This was mandatory tithing.

This tithing had to be done correctly and with the right attitude. Amos 5:21-24 speaks of the right attitude: "Instead let justice flow like a stream, and righteousness like a river that never goes dry." In Malachi 3:7-10 God tells His people they are robbing Him by not bringing the "full amount" of their tithes to the temple. Voluntary giving was also common: In Exodus, for example, Moses challenges God's people to contribute to the building of the tabernacle (Ex 35:4-5).

In conclusion: The Old Testament makes it clear that everything belongs to God and that man is only the manager. A mandatory tithing was used to take care of the temple and to help the widows and orphans.

1.2.2 New Testament

The concept of tithing used in the Old Testament is not specifically mentioned in the New Testament but the idea of giving to the Lord and His work is prevalent. For example, Jesus puts wealth and possessions in the right relationship to Eternal Life. In the two parables of the hidden treasure and of the pearl (Mt 13:44,45), the hidden treasure and the pearl are compared to the Kingdom of God. Both men,

after finding the treasure and the unusually fine pearl, sell everything they have to buy the field and the pearl. Man must seek the Kingdom of God above all else. Christ puts the value of God's Kingdom above those of worldly treasures (Mt. 6:33). Wealth is consequently not wrong, but it is clear that it must be used to serve God (Mt. 19:21).

This does not mean, however, that only the wealthy must give. In Mk 12:41-44 the poor widow gave all the money she had to the temple treasury. Her love, her obedience and her trust in God were shown through her action.

This kind of love of the widow for God was also fundamental in the early church. It did not claim any possessions as its own, but shared everything (Acts 4:32). An example of this love is the apostle Paul starting one of the first relief efforts when he raised money to help the poorer Judean churches. He recommended that every Sunday the Corinthian congregation should set aside money in proportion to what they had earned and save it up for when he arrived. (1 Cor 16:2). The apostles were furthermore maintained by the churches. In fact Paul states that the official workers of the church had a right to be maintained (1 Cor 9:3,4,6-18).

The early church was Christ-centred. This created enthusiasm not only for outreach but also for giving. Because the church believed the Second Coming of Christ was imminent, spiritual value was placed on almsgiving. The practice of having everything in common carried on in the church of the second and third century. As Tertullian writes in his *Apology* (around 200) "all things were common among the Christians except their wives" (Kohl, 1994: 13).

However, because the church needed more financial support for its ministry the Christ-centredness gave way to meritoriousness. This continued until the Reformation. Cyprian, Bishop of Carthage (195-258) wrote: "As water extinguishes fire, so almsgiving quenches sin." Augustine (354-430) similarly taught that almsgiving went hand in hand with the bettering of living standards and repentance (Kohl, 1994: 14).

In conclusion: The church in the New Testament was Christ-centred which created

enthusiasm for outreach and for giving. Everything was shared and spiritual value was placed on almsgiving. However, with time, this gave way to meritoriousness.

1.2.3 Middle Ages

Renewed emphasis was put on the Old Testament, legalistic aspect of tithing (Kohl, 1994: 14). At the end of the fourth century when Constantine declared Christianity to be the official religion of the state, property increasingly came into the hands of the Church. Rome became the centre for the financial administration of the church, numerous monastic orders were founded and many monasteries, particularly their leadership, became extremely wealthy – as they received parts of the holy tithe, including property. The church with its teaching of merits by works, levied taxes on everyone. The sale of spiritual worth, the sale of escape from punishment for sin and even the sale of church offices became common practice (Kohl, 1994: 17-19, Rust, Mcleish, 1984: 20).

This was also a high period for fundraising. In 1174, when the Normans had sacked the monastery of St Evurtius in England, Bishop Stephan sent out two fundraising letters. Included was the following sentence: "Standing in the smoking ashes of our church among the scorched timbers of its walls, soon to rise again, we are forced to approach the general public and shamelessly to ask for support from outside gifts." Methods of fundraising also became more sophisticated. Examples of this are found in the analysis of fundraising done for the Troyes Cathedral between 1389 and 1423. The table of income is split between appeals (there were professionally staffed campaigns), legacies, citizens, big gifts, and other. This analysis was taken further by comparing the different years with each other (Mullen, 1995: 6,7).

In conclusion: Rome became the centre of the financial administration of the church and because of its teaching of merits by works, levied taxes on everyone. These taxes became part of the theology of the church and was also closely related to salvation.

1.2.4 The Reformation

The Reformation brought with it radical change regarding charity and its practices. Firstly, a theology of justification by faith alone replaced the doctrine of justification by works and alms and secondly the doctrine of spiritual priesthood of all believers gave much more freedom and independence to the common man. Laziness and idleness were seen as a sin (Kohl, 1994: 23, Mostert, 1990: 23).

Martin Luther (1453-1546) did not stress voluntary giving for the church and clergy as an expression of faith. He approved the giving of a tenth (tithe) but held the opinion that the state together with the church should combine powers to raise church funds through tithing laws and state support (Kohl, 1994: 24).

John Calvin (1509-1564) did not say anything on the giving of a tenth but stressed the obligation of church members to take care of the poor and help with the upkeep of the church. He did not see any evil in Christians accumulating money or wealth as long as it did not draw them away from God (Kohl, 1994: 35).

In England the pulpit was a medium through which many people were reached. In 1536 Henry VIII decreed in his Beggars' Act that "every preacher, parson, vicar, curate of the realm' should use sermons and other means to 'exhort, move, stir and provoke people to be liberal and bountifully to extend their...alms and contributions...toward the comfort and relief of...poor, impotent, decrepit, indigent and needy people." (Mullen, 1995: 12).

Printing was an important aspect of the reformation and was even used for direct mail appeals. Social leadership dominated large segments of English fundraising. There was great concern and generosity - and vulgarity -: "Find a Duchess, flatter her and get £500" was the motto of the Press Bazaar News in the late nineteenth century (Mullen, 1995: 12,13).

In conclusion: In the Reformation a theology of justification by faith alone replaced the doctrine of justification by works and alms. Luther approved the giving of a tenth while Calvin stressed that the church members should take care of the poor and

help with the upkeep of the church.

1.2.5 Giving in the "New World"

Pilgrims arriving in the New World supported the ministry of the Word and charity for the poor, solely from voluntary giving. Towards the end of the 1600's, however, many churches turned to public taxation. By the end of the eighteenth century individual states were forced to abandon compulsory support laws, largely because of successful fundraising by new voluntary Christian efforts. The fundraising did not include anything new, but included the sale or rental of pew spaces, lotteries, subscription lists, church-farm ownership and the buying and selling of goods in the church (Kohl, 1994: 32).

During the end of the eighteenth century and the beginning of the nineteenth century, a spiritual awakening took place in Europe and America, which led to the formation of the first modern mission organizations. Everything was organized around God's work. John Wesley (1703-1791), the founder of Methodism was part of this awakening. He preached that a Christian should not only give the required tax and tithe but everything that was left after he has taken care of his family. But Wesley became disappointed at the growing tendency of Methodism toward worldliness. His formula, "Gain, save, and give all you can," was changed to "Gain all you can and save it." (Kohl, 1994: 32-34).

Various missionary societies were established of which the British and Foreign Bible Society was but one. This marked the beginning of the Protestant foreign missionary enterprise. China Inland Mission was one of the first faith missions, founded by Hudson Taylor. This mission believed in never asking for money, never telling anyone of their needs, and looking to God alone through prayer. Although Hudson Taylor never directly asked for money, he was a brilliant communicator and there is no doubt that his audience knew exactly what the mission needed, when they needed it and how much (Rust, Mcleish, 1984: 21-23).

By the late nineteenth and early twentieth centuries, American Protestantism had

begun to supply the majority of funds and personnel for foreign missions, while the support in Europe for missions continued.   Churches in England and Germany began funding projects to train youth for missionary services. In America, Hudson Taylor, George Muller and Dwight L. Moody were inspirational leaders. Their openness and enthusiasm attracted funds and volunteers for foreign missions. Taylor and Muller are well known for their humility regarding contributions for their work. Taylor vowed never to go into debt. He rejected unconsecrated money, while William Booth, founder of the Salvation Army, said he would receive any kind of money, and "wash it in the blood of Christ and use it for the glory of God." Professionally designed and managed fundraising probably started in 1883 with the Young Men's Christian Association (YMCA). (Rust, Mcleish, 1984: 22,23).

In conclusion: Ministry in the New World was mostly funded by voluntary donations. The first modern missions were established in Europe and America and it was the beginning of foreign missionary enterprise.   Inspirational leaders in America included George Muller and Dwight Moody – both successful in their fundraising efforts although their viewpoints on how to raise funds differed.

1.2.6 Twentieth Century

At the beginning of the twentieth century, state support of the Roman Catholic Church began to wane. Gifts were now received from thousands of lay people. The growth of parachurch groups had also forced a change in Protestant church funding. Parachurch groups became well versed in raising funds. Most of them raised their funds personally by visiting churches. Mainline churches tried to become better organized and established central mission funds. But this had its problems because the churches rarely saw the missionaries they were supporting and interest declined (Rust, Mcleish, 1984: 24).

By the turn of the second millennium churches and parachurch groups have grown more interdependent. Both compete for the same funds and personnel. Together with that, they also compete with secular organizations. In 1993 there were more than 575 690 established religious and charitable organizations in the USA (Giving

USA, 1995: 30). In Germany voluntary giving as such has been limited, partly because of the destruction resulting from two world wars but also because of the tax system by which the government supports all church activities, including the many social and Christian mission activities at home and abroad. In 1994, 19000 charitable organizations were registered in Germany (Kohl, 1994: 36,37).

In Germany, voluntary giving for Christian ministry is not really considered, because of the church tax. Those who do respond, respond out of motivations other than religious ones. 95% of Germany's population would, even if stewardship were preached from the pulpit, not hear it, since they rarely if ever, attend church (Kohl, 1994: 39).

In conclusion: Parachurch organizations became well versed in fundraising while mainline churches tried to become more organized in their efforts. By the turn of the second millennium parachurch and church organizations both compete for the same funds and personnel and the number of organizations in the USA have grown rapidly.

1.2.7 South Africa

On 6 April 1652 the church in South Africa came into being. The Dutch East India Company (V.O.C.) started a commercial venture but did not forget about the church. During the first years, ministers and sick-comforters were employed by the V.O.C. and was also paid by them. Funds were raised by way of special collections at church, funds received at funerals, rental of pew spaces, bequests and endowments, collection boxes for the poor and general gifts (Mostert, 1990: 49).

With the re-organization of the church in 1665, a degree of separation took place between the church and state. The state left spiritual and church affairs to the Church Councils. This did not mean complete independence however. This practise was still in existence in between 1802 and 1806 (Mostert, 1990: 50).

With the occupation of the Cape by the British (1795-1803) little was changed in the

funding of churches. However on 25 July 1804 with the publication of the new church order things changed drastically. Every church denomination was now responsible for itself. Government of the day still retained the right to determine the contributions church members were required to give to the church. In spite of this new law, the government continued paying ministers' salaries - to prevent the church from becoming too independent. In 1843 the state officially relinquished its authority over the church, however the paying of ministers continued deep into the nineteenth century (Mostert, 1990: 52-54).

In the past charity in South Africa was a community affair and most of the time was linked to the church, which carried most of the responsibility for fundraising. There were always enough volunteers to help with fetes and cake sales.

Prior to the twentieth century there were no organized welfare services in South Africa. Even in 1910, when the Union of South Africa was formed, there was no welfare department. Just before the Second World War, the Carnegie Poor White Investigation Report recommended the creation of a State Bureau of Social Welfare to co-ordinate the welfare activities in co-operation with voluntary organizations and churches. A Department of Social Welfare was established in 1937 (Cuthbert, 1995: 18)

Active fundraising took place during the Second World War and some control over collections was needed. This gave rise to the Welfare Organisations Act, No. 40 of 1947. With the publication of the Welfare Act, No 79 of 1975, national and regional Welfare Boards came into being. Several commissions followed. Out of their recommendations came the Fundraising Act, No. 107 of 1978.

More recently the Nonprofit Organisations Bill 1997 was promulgated. It states that the registration of all organisations not run by the state is voluntary (and not only certain named organisations) as was the case with the Fundraising Act, No. 107 of 1978.

South Africa has always been regarded as a Christian country. The South African Christian Handbook 1993/1994 (p ix) states, however that the country "stands on

the threshold of a new era - one which will no longer protect a so-called Christian society. Instead Christians will need to stand up and be counted, refusing to be part of the secularisation of our society." It is stated (p ix) that "54% of the total population regarded themselves as Christian in 1970. By 1980 this figure had dropped to 47,5% and in 1990 to 38%. Although the 1990 figure is possibly not entirely correct, it is the editor's conviction that the downward trend is continuing."

Hendriks (1996: 8) argues that "South Africans of European descent are discovering how modernistic their identity really is." In one of his conclusions he states that the society in which we live is secular and norms are constantly in conflict with fundamental Christian principles. It would seem, therefore that the church and, in particular, parachurch organizations in South Africa, face a variety of challenges in the next millennium.

Little data is available on Christian parachurch organizations in South Africa. Although the *South African Christian Handbook* is probably the most (if not the only) comprehensive list available. Fundraising methods in parachurch organizations are consequently not well documented. In addition organizations are not compelled to register with the Department of Welfare.

In conclusion: Prior to the twentieth century charity was a community affair with no organized welfare services. In 1975 the first Welfare Act was promulgated with the latest being promulgated in 1997. South Africa has always been regarded as a Christian Country but this has changed as shown in the census figures. This has given rise to a variety of challenges for church and parachurch organizations in the new millennium.

1.3 THEOLOGY OF FUNDRAISING

Personal experience with people in the Christian fundraising field has shown that there is disagreement on the correct biblical model that should be used in fundraising and in fact whether fundraising should be carried out at all. Statements are often made at seminars that there are two extremes: Not to ask and to manipulation. The Bible contains examples

of fundraising. In the Old Testament God told Aaron that the Levites should be funded by the tithes received from the people (Num. 18). In the New Testament Paul asked Christians to give to their brothers in need (2 Cor 8-9). And in 2 Cor 9:6-15, Paul discusses the concept of giving. This specific scripture is divided in two parts: It explains what giving does for the giver and what giving does for others. In each of these cases four items are identified.

In 2 Cor 9:6-11 the following are identified: What the donor gives determines what the donor gets; donations reflect the heart of the donor (giving without compulsion or complaining); proper Biblical giving makes the donor dependent on God and giving enables the giver to give more (verse 10,11).

In 2 Cor 9:12-15 the following is identified: Giving supplies the needs of God's people (first part of verse 12); it promotes the glory of God (second part of verse 12); proves the givers faith and obedience (verse 13) and motivates love and prayer for the giver (verse 14).

The church, as it is described in Acts encompasses all aspects of ministry. Today, however, many of these aspects for example, taking care of the handicapped, widows and orphans, have been taken over by parachurch organizations or the government. Many mission organizations are also parachurch organizations and most of their activities lie outside the local church. Although this is the case, these parachurch organizations must be considered part of the body of Christ. It is the writer's point of view that Christians should first give for the needs of their church and then to parachurch organizations.

Given the decline of Christianity in South Africa, it can be assumed that as regards secular people and nominal Christians there is a strong possibility that the church will not receive any (or only a token) tithe. Parachurch organizations therefore have an advantage - they are able to raise funds from these individuals. Donors should hear the message that everything they possess belongs to God and has been entrusted to them. As Kohl (1994: 42) states: "Christian fundraising is part of Christian ministry."

Above all Christian fundraising must be professional. Christian organizations re-present the Kingdom of God. Kohl (1994: 44,45) continues: "Since Christian fundraising is part of Christian ministry - pointing to and actually practising kingdom values - professionalism is

needed. Counting the cost developing plans, using the proper resources, setting objectives, making the right decisions and evaluating results are the basis for modern management techniques which are needed for responsible Christian fundraising and stewardship."

Biblical examples have shown that fundraising in Christian organizations can and should be done. Fundraising should be part of the ministry of the organization and above all should be professional.

1.4 THE PROBLEM

In 1996, 87% of charitable giving in the United States went to religious causes. In South Africa this situation is probably very similar (Seminar: Christian Fundraising: 1998).

The writer has had contact with various Christian organizations over the past ten years. These organizations have various missions but most of them are in the missionary field within the boarders of South Africa. They vary in size from small organizations with one or two full-time workers to large organizations with offices countrywide, manned by full-time staff and with an even larger contingency working in the field.

In most cases a lack of professionalism have been found within their ranks. Planning for expenditure - how the money raised will be used in the field for the work being done - is usually excellent. Planning for the income side of the budget (for one year or more) on the other hand is almost non existent. This planning includes deciding what business the organization is in, what is needed, the objectives, how the money is to be raised and the expense involved.

Furthermore, the organizations seldom ask directly for money from their donors, but in every letter and newsletter mention their pressing financial needs. It is the writer's point of view that prayer is an important part of a Christian organization. But prayer alone is not enough. It is also biblically correct to directly ask for funds.

1.5 THE SOLUTION

Fundraising is demanding and challenging. It is a process that needs to be followed step-by-step. Almost every organization, no matter how small, can put together a sound fundraising plan and carry it through to conclusion with reasonable chances of success.

To help the fundraiser and staff understand how fundraising should be done (the cycle of fundraising), Henry Rosso (1991:9-14) devised a fundraising cycle to explain the elements of fundraising. This cycle should form the basis of planning for fundraising, especially if this has never been attempted by the organization before. It can be used by any organization, no matter how large or small and it helps to visualize the process needed to make fundraising a success.

All of the cycle checkpoints will be discussed in detail in the rest of the thesis except volunteers, although this subject is mentioned in short in the cycle.

1.5.1 The cycle checkpoints

Figure 1.1 visualizes this process. Planning checkpoints are shown as rectangles, action checkpoints are shown as triangles and strategic checkpoints as oblong circles.

STEP 1: Planning checkpoint: Examine the case. An organization comes into being because of a need within the community. Without a need or a cause there is no organization. In order for the organization to serve that cause effectively the organization needs a case statement.

A case statement clarifies the organization's position and objectives and is used in verbal and written communication with donors and potential donors. (Cuthbert, 1995:27). It has all the reasons and arguments as to why anyone should support the organization.
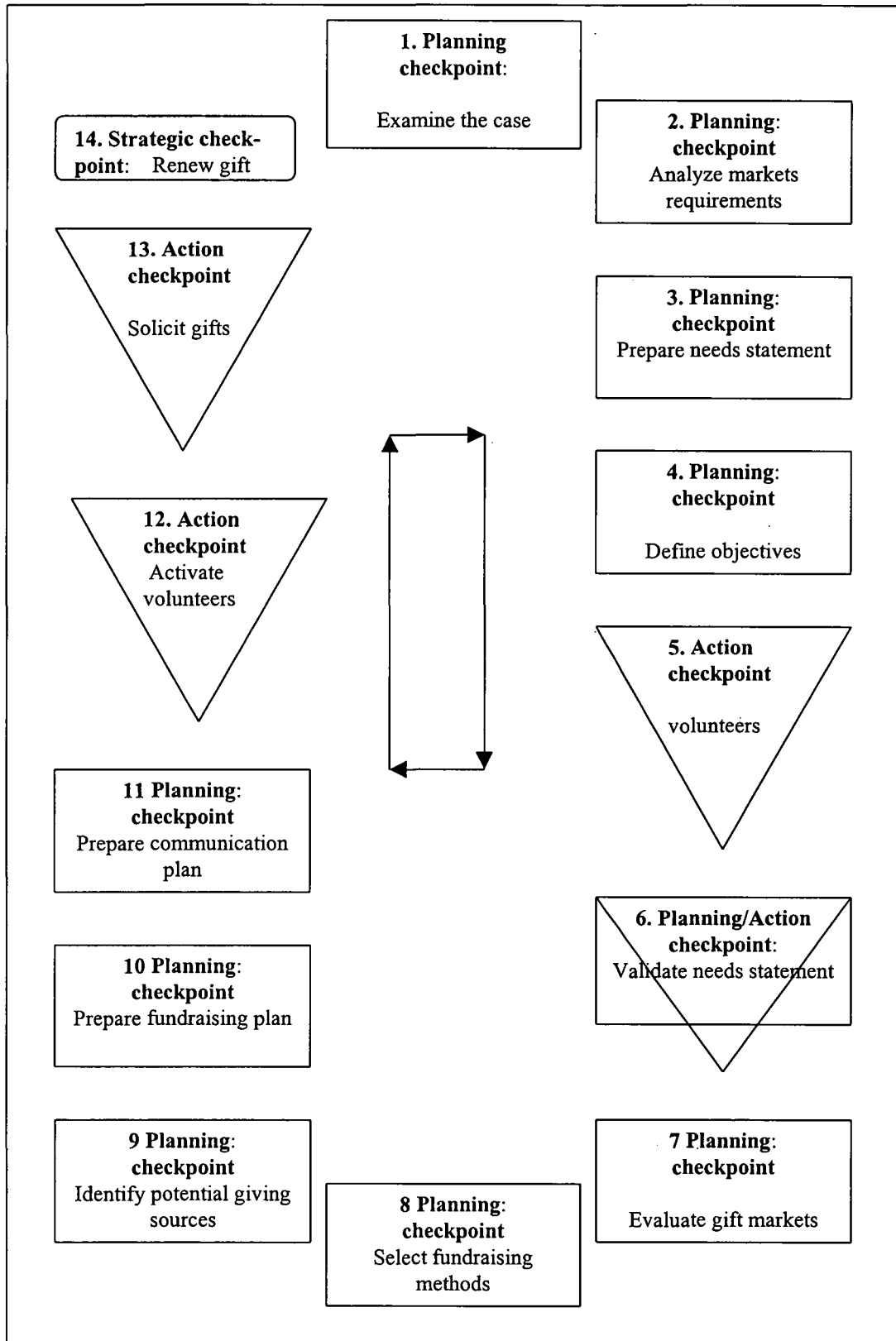
Figure 1.1: The fundraising cycle as adapted (Rosso, 1991:10)

Questions that need to be answered include the following:

* Why does the organization exist?

* What does the organization offer to meet these needs?

* Who should support the organization?

* Why should an individual support the organization?

STEP 2: Planning checkpoint: Analyze market requirements. Organizations that base their work on the needs of the community are often assured of continuing gift support. An organization can have the best cause possible, but if its supporters do not know about the programme or consider it unimportant, fundraising success is minimal. Feedback on these issues is important. Questions that need to be answered include the following:

* Is the case sound?

* Are the programmes reasonable?

* Are the financial needs reasonable and can they be met by the organization's supporters?

Only after the organization has assessed the needs of the community and looked at its attitude towards these needs being met can it move to the next steps in preparation for fundraising.

STEP 3: Planning checkpoint: Prepare needs statement. After the organization has assessed the needs, these must be prepared in draft form for review by individuals involved in the organization. Everybody, from board members to volunteers, must be involved in validating the needs statement. If they are involved in the planning process they tend to be dedicated and supportive givers, and workers. A validated needs statement is then translated into programme plans which in turn are broken down in action steps. These plans are then expressed in financial terms - a budget.

STEP 4: Planning checkpoint: Define objectives. Before a programme plan can be implemented it is necessary to determine goals and objectives. Goals tell the organization where the programme has to be. Objectives are the measurable stages of the programme, and show how the goal will be achieved (Cuthbert, 1995:29). In establishing a hierarchy of objectives the planner will move from a

general goal, for example "evangelism", to specific objectives such as talking to a specific number of people within a defined period. This is linked to programme budgeting and to fundraising activities.

STEP 5: Action checkpoint: Involve volunteers. Funds can be solicited in different ways such as special events and direct mail. Some organizations make use of volunteers to do this. If these people are to be enthusiastic in doing this they need to be involved in the planning process.

STEP 6: Planning and action checkpoint: Validate needs statement. Volunteers and other people involved with the organization should be given the opportunity to accept, reject or modify the needs statement. Only then will they be enthusiastic in their work.

STEP 7: Planning check point: Evaluate gift markets (source). Once the needs statement has been prepared and the financial goals decided, it is important to determine which gift sources should be approached. These include individuals, foundations and trusts, corporations and government agencies. Individual giving represents approximately 87% of the giving force in America. Trust and corporates make up the remainder (Giving USA 1996). Although no statistics are available in South Africa it is generally assumed that these figures are approximately the same. Broad-spectrum fundraising promotes good health within the organization. It makes the organization resilient. If the organization concentrates only on a specific source of funding and problems develop with that source (such as government subsidies) the organization might face grave financial difficulties (Rosso, 1988:22.7).

The fundraiser, when evaluating a source, must answer the following question: "Is there an ability to give, or a history of giving to organizations with similar programmes?" This will help the fundraiser decide on which markets can be approached with a reasonable possibility of success.

STEP 8: Planning checkpoint: Select fundraising vehicle. Selecting the fundraising method is as important as selecting the source. Each fundraising method has its

own function and impact and includes annual funding, direct mail, special events; capital campaigns and planned giving. The fundraiser must analyze the performance records of the past three years according to gift sources and fundraising techniques (such as direct mail and gift purposes). In this way, strengths and weaknesses are identified and planning can be carried out accordingly.

STEP 9: Planning checkpoint: Identify potential giving sources. Potential donors can be found within every market. These potential donors must be evaluated in terms of gift ability, interest in the organization and accessibility. By doing this, the market is refined, prospect files are built and this leads to greater fundraising effectiveness. Research on potential donors is vital if the organization is to survive in the competitive world of fundraising. The organization that fails to focus its fundraising efforts on the best possible audience will tend to waste money and time.

Mullen (1996:45) uses the following research model in figure 1.2:

Active present: who knows,
funds and supports the organization.

Past: Whom the org.   *Future*: All categories

knew, who funded and   ⟵ RESEARCH ⟶ of people who should,

supported the org.   and might support the org

Passive present: latent, inactive
contacts and passive roles (such as
patrons and vice presidents)
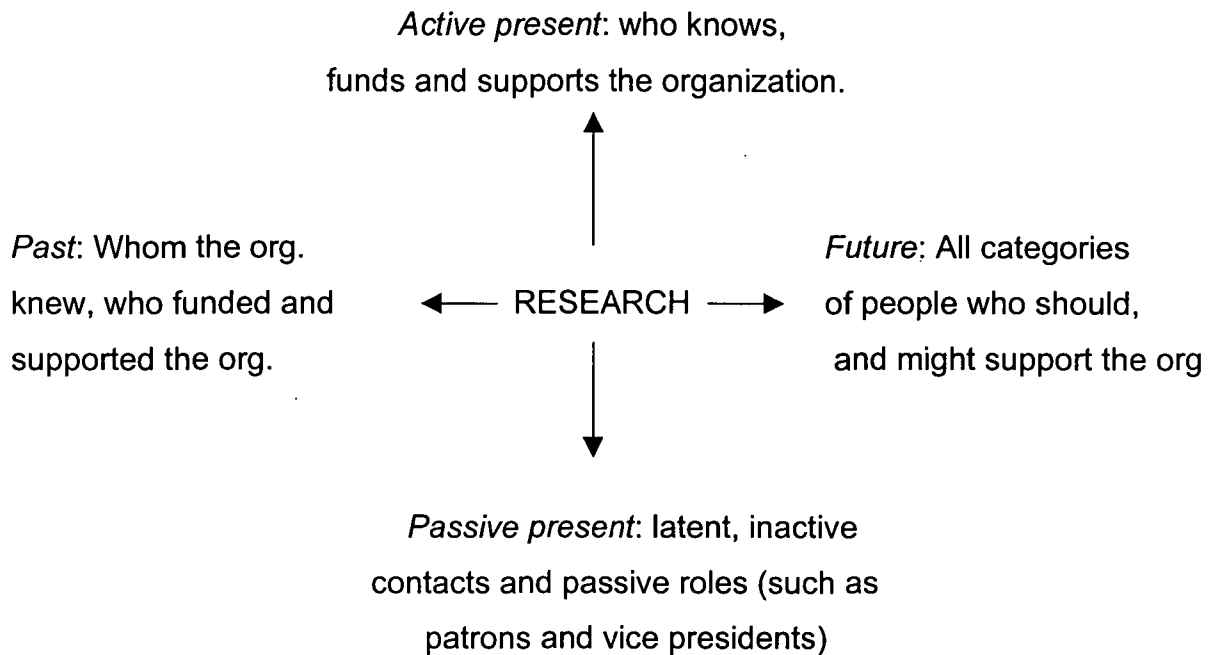
Figure 1.2: Research model for identifying potential donors. (Mullen, 1996:45)

Mullen argues that research for possible donors is broken down in four categories:

*Active present: Those are the donors who actively support the organization at the present.

* Passive present: Those who are inactive at present.

* Past donors: Those who funded the organization in the past, but are not doing so in the present.

* Future donors: Those people who should and might support the organization in the future.

Mullen maintains that this research should reflect the organization's situation at present, whereas its focus should be on the future. It is part of a dynamic and progressive process.

STEP 10: Planning checkpoint: Preparing fundraising plan. Fundraising is a management process. It is therefore necessary to gather the facts, study them, prepare a plan, execute it and evaluate and modify both wherever necessary. All functions leading to this point have involved fact finding and analysis. Now it can be

transformed into a plan.

Questions such as the following should have been answered:

* What is the case for fundraising?

* Is it sound and has it been tested?

* Are the objectives clear and measurable?

* Are the needs valid and has it been validated?

* Is the budget correct?

* What sources of funding are available and which ones can the organization
 approach?

* How is the fundraising going to be done?

* Do the organization have a strong volunteer force?

* What method of communication will work best? (Rosso, 1988: 22.9).

STEP 11: Planning checkpoint: Prepare communication plan. The case for financial support must now be communicated to individuals who are in a position to give a donation. Creative communication is a two-way instrument and transmits the organizations' needs, goals and objectives. It must also be designed to receive feedback and answer questions about the organization. (Rosso, 1988: 22.9)

The communication must create a true understanding of the organization in such a way that people want to become involved, wish to share and are eager to help.

STEP 12: Action checkpoint: Activate the volunteer force. In fundraising it must be borne in mind that people give to people with causes and not to organizations. The most effective way to get a new donor is face to face solicitation, where a dedicated volunteer who is committed to the cause asks another to support the organization. Volunteers can also be used in the work that the organization does. Examples are: Manning telephones during a mission drive, or helping in a soup kitchen. Many donors prefer not to give money, but rather donate their time for the benefit of the organization. This source must be nurtured because it is an invaluable asset to the organization.

STEP 13: Action checkpoint: Solicit the gift. For fundraising to be effective,

someone must ask someone for a donation. If this is not done, even the planning will not bring any money into the organization. Receiving the donation is often seen as the end of the process. This is not true. Apart from the fact that the donor is thanked immediately, it is the beginning of a continuing and important relationship with the donor. As steward of the gifts received from donors it is the responsibility of the organization to regularly report back on how the money has been used. Rosso (1991:14) continues: "Sound business practice endorses the procedure of accountability and disclosure".

STEP 14: Strategic checkpoint: Renew the gift. The donor who has given a gift for the first time must be asked again. In doing so the habit of gift making can be formed and the donor can become a "partner" in the organization.

STEP 1: Planning checkpoint: Examine the case (The cycle starts again). Just as a gift must be renewed, so must planning be renewed through regular, critical evaluation in order to determine if, indeed, the cause is being responsive to the changing needs of the target groups.

1.6 SYNOPSIS

The Old Testament is clear: Everything belongs to God, and man is only the steward of God's property. Tithing was a means of supporting the clergy as well as helping the poor, widows and the orphans. This idea of giving to the Lord's work is continued in the New Testament. Although the early church was Christ-centred this in time gave way to meritoriousness - which continued until the Reformation in Europe.

With the discovery of the New World fundraising methods were taken to the new continent and developed in ways slightly different to those of Europe. In the early nineteenth century a spiritual awakening took place and the first modern mission organizations were started in Britain and America. With the turn of the second millennium, churches and parachurch organizations have grown and compete for the same funds and personnel.

In South Africa, the church came in to being in 1652 with the landing of Jan van Riebeeck.

This began the history of Christian fundraising in South Africa. In early years charity was a community affair and was generally linked to the church, which carried out most of the responsibility for fundraising. In 1937 a Department of Welfare was established which led to some control as to how funds were to be collected. Active fundraising took place during the Second World War, which gave rise to the Welfare Organisations Act, No. 40 of 1947. This was followed by the publication of the Welfare Act, No 79 of 1975 and in 1978 the Fundraising Act, No. 107 of 1978. More recently the Nonprofit Organisations Bill 1997 was promulgated.

At the end of the second millennium, given the decline of Christianity in South Africa, fundraising must be professional and it must be a form of ministry. In order to do this proper planning is necessary. This is called the fundraising cycle.

The cycle starts with examining the case and then goes on to the following: Analyzing market requirements, preparing a needs statement, defining objectives, evaluating gift markets, selecting fundraising methods, identifying potential donors, preparing a fundraising plan, preparing a communication plan, activating the volunteer force, soliciting the gift, renewing the gift - and then starting all over again.

2. OBJECTIVES, METHOLOGY AND LITERATURE REVIEW

2.1 INTRODUCTION

Christian organizations in South Africa are often viewed by outsiders (as well as those working within these organizations), as unprofessional in their fundraising efforts. Proper planning for the organization as a whole and in particular for its fundraising efforts is not done. If this is the case and an organization is not effective in its fundraising, the organization is doomed to failure because funds will not be forthcoming to do the work. This in turn leads to frustration of the workers as well as the donors of the organization.

This study explores the concept of fundraising as a professional undertaking within Christian organizations.

2.2 STATEMENT OF THE PROBLEM

The key issue of this study is that the level of professionalism in Christian fundraising is often wanting. This influences the actual work being done as well as the ability to attract donors to the organization (and keep them).

Against this background this study attempts to give guidelines on how fundraising should be approached in organizations and, in particular, Christian organizations.

The research hypotheses addressed in this study, are the following:

H_1. Christian organizations differ in their professional conduct in fundraising efforts

H_2 Professionalism in fundraising differs between organizations that do not ask for funds as apposed to those that ask directly.

The validity of these hypotheses will be tested in the cause of the thesis.

2.3 OBJECTIVES

The following objectives are to be met with the outcome of this study:

Firstly, due to the fact that there is very little South African literature, this study attempts to improve on the situation.

Secondly, to determine a South African perspective on Christian fundraising.

Thirdly, to identify what it means to be professional in fundraising.

Fourthly, to set the parameters for a practical beginners guide for Christian fundraising in South Africa.

Fifthly, to study Christian organizations and determine the level of professionalism of their fundraising efforts.

2.4 METHODOLOGY

2.4.1 Literature review

Literature was gathered through the following sources:

Firstly, the Stellenbosch University library. This included, SA Sources as well as from the USA , Britain and Canada. It consisted mostly of books (SA , USA and Britian), articles ordered from the USA and a thesis from Canada. No South African manuscripts or theses were used because there were non available.

Secondly, the Internet using keywords "fundraising", "Christian" and, "Christian fundraising. This was a excellent medium to gather information on textbooks available.

Thirdly, contact with other fundraisers within South Africa and overseas. All of them

were known to the writer via fundraising seminars. They were personally visited or contacted via e-mail or telephone.

Fourthly, the writer's private library on fundraising.

2.4.2 Personal interviews

Information on specific issues was also gathered from personal interviews. This method was used especially for information on capital fundraising, trusts and personal support raising. Personal interviews with Christian fundraisers were also employed in the course of compiling the questionnaire employed in the empirical survey.

2.4.3 Empirical study

The empirical data was collected by means of a postal survey among Christian evangelical organizations in the Republic of South Africa. Two hundred and seventy questionnaires (Annexure 1) were mailed together with a cover letter from the promoter and a personalized letter from the researcher. The fundraiser was asked to answer the questionnaire and return it in the business reply envelope supplied, as soon as possible. In order to ensure a good response an incentive of R200,00 cash was offered for the first questionnaire received back. A total of 94 useable questionnaires were returned, which represented a response rate of 34,8%.

2.4.4 Personal experience

The writer has been working in the field of fundraising since 1987 as head of the fundraising office of the Christian Seaman's organization and has personal experience in this field.

2.5 STRENGTHS AND LIMITATIONS

There are always certain strengths and limitations in any extensive research project. Those experienced in this study were briefly the following:

2.5.1 Strengths

Firstly, a great deal of international literature on fundraising and Christian fundraising is available, especially in the USA and Britain. Experience in fundraising in South Africa and seminars given by local and international speakers have shown that the conditions which pertain to fundraising in Europe and the USA are much the same as in South Africa. Consequently, most of the literature available was capable of being used and adapted for South African conditions.

Secondly, the support and practical guidance received from other South African Christian fundraisers was important.

Thirdly, the fact that the writer has been in the field since 1987 and has some practical experience of the issues involved.

Fourthly, the absence of South African literature has a positive influence on the attitude and co-operation of relevant role-players in the field.

Fifthly, The limitations experienced contributed to the good timing and need for this study.

2.5.2 Limitations

Firstly, in this study the greatest limitation was the fact that there is a dearth of literature and statistical analysis available on fundraising (both secular and Christian) in South Africa.

Secondly, the subject seems to have remained largely unresearched, creating a

need for this initiative.

Thirdly, those involved in the business of fundraising (within Christian organizations in particular) are mostly not professional people, resulting in virtually no formal data or systems available for research.

Fourthly, Christian organizations appear to be naive when it comes to fundraising, while industry remains largely unstructured.

Fifthly, there is also an absence of co-operation between organizations, which tend to cling to what and how they do things and are reluctant to share experiences.

Sixthly, information is also very hard to come by perhaps because fundraisers do not like to be confronted with questions related to practice.

2.6 LITERATURE OVERVIEW

The literature overview is divided into three sections:
(a) General literature in marketing, management and planning
(b) Specific literature on marketing, management and planning in non-profit organizations.
(c) Literature on the subject of fundraising in non-profit organizations and in particular Christian fundraising.

(a) General literature: In the quest for general information on the subject discussed in this thesis, a number of textbooks were consulted. This was used to determine the outline, especially on strategic planning. Business principles can and must be applied to the non-profit field and in particular the Christian fundraising field. The following are some of the books used to gather general information:

Pearce & Robbinson (1985). Strategic management. Second Edition. Richard D. Irwin, Inc.
Stoner, A.F.J. (1982). Management. Second Edition. Prentice Hall International, Inc.
Kotler, P. (1984) Marketing management : Analysis, planning and control. Fifth edition. Prentice Hall International Inc.

Buell, V.P. (1985). Marketing management. McGraw-Hill Book Company.

Evans, J.R& Berman, B. (1982). Marketing. Macmillan Publishing Co. New York and Collier Macmillan Publishers London.

Nash, E.L. (1986) Direct marketing. Second Edition. McGraw-Hill Book Company.

(b) Specific literature: In this category only one book was used. The book is technical and only useful to the more experienced in the field:

Kotler, P & Andreasen, A.R. (1991). Strategic Marketing for non-profit organizations. Fourth Edition. Prentice Hall.

(c) . Literature on the subject of fundraising: There are few journals and textbooks on South African fundraising. There appears to be only one regular newsletter - *Fundraising Forum* - published by Downes Murray International which is geared to fundraising in general – as apposed to specifically Christian fundraising.

Only one usable South African textbook on the subject "fundraising" were discovered: Cuthbert, D.L. (1995*). Money that Matters: an introduction to fundraising in South Africa.* The book is practical and is used extensively by the writer.

Books on Christian giving that were used for background reading included the following two books:

White, J. (1993). Money isn't God. Revised edition. Inter-Vasity Press.

Hales, E.J & Youngren, J.A. (1981). Your ministry their money. William B. Eerdmans Publishing Company.

On fundraising in general, four books were selected:

Seymour, H.J. (1988). Designs for fundraising. Second edition. Fundraising Insittute.

Howe, F. (1991). The board Member's guide to fundraising. Jossey-Bass Inc. Publishers.

Lord, J.G. The Raising of money. (1989). Thirteenth printing. Third sector Press.

Phillips, E.H.)1969). Fund-raising techniques- and case histories. Bussiness Books

Limited.

Conners, T.D & Callaghan, C.T. (1982). Financial management for nonprofit organizations. Amacom Book division.

On books and theses actually used in the writing of the thesis the following stand out:

Anderson, A. (1996). *Ethics for Fundraisers*. Indiana University Press.

Conner, T.D. (Ed). (1988) *The Nonprofit Organization Handbook.* Second Edition. McGraw-Hill Company.

Rosso, H.A. & Ass. (1991). *Achieving Excellence in Fund Raising.* Jossey-Bass Publishers.

Cuthbert, D.L. (1995). *Money that Matters: an introduction to fundraising in South Africa*. Second Edition. Van der Walt.

Dillon, W.P. (1993). *People Raising. A practical guide to raising support*. Moody Press, Chicago.

Dove, K.E. (1988). *Conducting a Successful Capital Campaign*. Jossey- Bass Publishers.

Downes, M. (1987). Downes on Fundraising. Michael Downes.

Kohl, M.W. (1994). *Fund-raising principles for maintaining continuous giving to Christian Humanitarian ministries.* Doctoral dissertation, Gordon-Conwell Theological Seminary South Hamilton, Massachusetts.

Warwick, M. (1994). *How to Write Successful Fundraising Letters*. Strathmoor Press.

2.7 OUTLINE OF THE STUDY

The study is divided into eleven chapters:

Chapter One gives the history and theology of Christian fundraising and discusses the problem surrounding fundraising and the solution to the problem.

Chapter Two describes the scope of the study and states the problem and hypothesis, the objectives of the study, the methodology, the limitations and strengths of the study and gives a brief literature overview.

Chapter Three concentrates on the preparation for fundraising which includes the process of strategic planning, the planning for public relations and finally the case statement that should be used in the fundraising efforts of an organization.

Chapter Four discusses the different sources of revenue available to the fundraiser; namely individuals, corporations and trusts.

Chapter Five and Six discuss methods that can be used to solicit funds from the sources discussed in Chapter Four.

Chapter Seven focuses on creative writing and the theory of writing a good fundraising letter and then gives examples of good and bad fundraising letters.

Chapter Eight examines the ethics applicable to fundraising.

Chapter Nine discusses fundraising administration, including donation and donor administration, as well as financial control.

Chapter Ten and Eleven analyse the empirical results of the 270 questionnaires mailed to organizations and make certain conclusions and recommendations.

3. PREPARING FOR FUNDRAISING

3.1 INTRODUCTION

In preparing for fundraising the most important aspect is effective planning. Experience have shown that, although most Christian organizations do day-to-day planning (and plan how the donations received will be spent on the work being done), very little time is devoted to future plans.

Planning is defined in the *Collins Paperback English Dictionary* (1994: 644) as "a scheme or method for doing or achieving something." The process in preparing for fundraising is an essential function for every manager. The organization also needs to embark on an encompassing strategic planning exercise, which differs from planning in scope, importance, resource commitment, time frame and purpose. It can positively influence the organization's performance, focus future thinking, highlight opportunities and threats and help to build teamwork. It includes not only how the funds received will be spent, but also helps the fundraiser deal with the actual process of fundraising.

3.2 STRATEGIC PLANNING

A major advantage of strategic planning is that those involved in the planning develop a better knowledge of the organization and communication levels within as well as with the publics outside the organization.   Instead of merely responding to the world the organization works in, it will have better control on developments. Strategic planning is not an end in itself, although it helps make important decisions. Those responsible for the public relations of an organization must also be part of this process, because their plans must be part of the overall plans of the organization.

Only after the strategic planning has been done, can the fundraising manager effectively develop a fundraising programme based on the organization's vision and direction for the future. Alexander (1990:156) states that at least 20% of the fundraising manager's time must be spent on planning. All the information needed for developing a fundraising

programme will be found in the strategic plan. Information such as who the organization is (mission), what it is trying to do (goals and objectives), as well as the reasons a person should invest in the organization is captured in the planning process. It gives fundraising campaigns history, purpose and plan. Based on this information, material can be aimed at specific targeted groups with selected projects in order to solicit funds. This will strengthen the fundraising office in its attempts to solicit funds and ensure a greater chance of success.

The Glossary of Fund-raising terms (1986: 96) defines strategic planning as a "programme incorporating a strategy for achieving organizational goals and objectives within a specific timeframe and with substantive support in the form of methods, priorities and resources." In simple terms, strategic planning is a logical process whereby the organization determines where it is, where it is going, how it is going to get there and how it will know when it has arrived.

Fundraising in a Christian organization can only start - and be successful - if the organization has determined its course through the process of strategic planning. The information gathered through the process will be used extensively in the fundraising process. The answers to the questions of where the organization is now and where does it want to be will help to establish the mission statement, which will be used in the communication with donors. The stakeholders and member analysis will help the fundraiser determine the audience of the organization. Finally, with the establishment of goals, objectives and budgets the fundraiser will know what funds will be needed for which objectives and goals and this in turn will be communicated to the donors. By tracking and measuring the results the fundraiser will know if the fundraising plan is on track.

3.2.1 The process

Before discussing the process of strategic planning, consensus must be reached as to who should do the planning. Strategic planning must start at the top of the organization because the decisions that will be reached will have a major impact on the direction of the organization. It remains the responsibility of the Chief Executive Officer (CEO). However, the Board of Trustees, the staff and other stakeholders

but must also be involved. People are more committed to a strategic plan if they are involved in designing it. They must also know that the plan has the full backing of top management if it is to have credibility throughout the organization.

The planning process needs to be adapted to fit the organization. For example, methods used in a large organization will not necessarily work for a small organization. The process is presented diagrammatically in figure 3.1:

1 Where is the organization now?

2 Where does the organization want to be?

3 SWOT analysis

4 Mission and Philosophy Statement

5 Stakeholders and member analysis

6 Organizational goals and objectives

7 Divisional goals and objectives

8 Action steps

9 Budget

10 Tracking and measuring

11 Corrective action
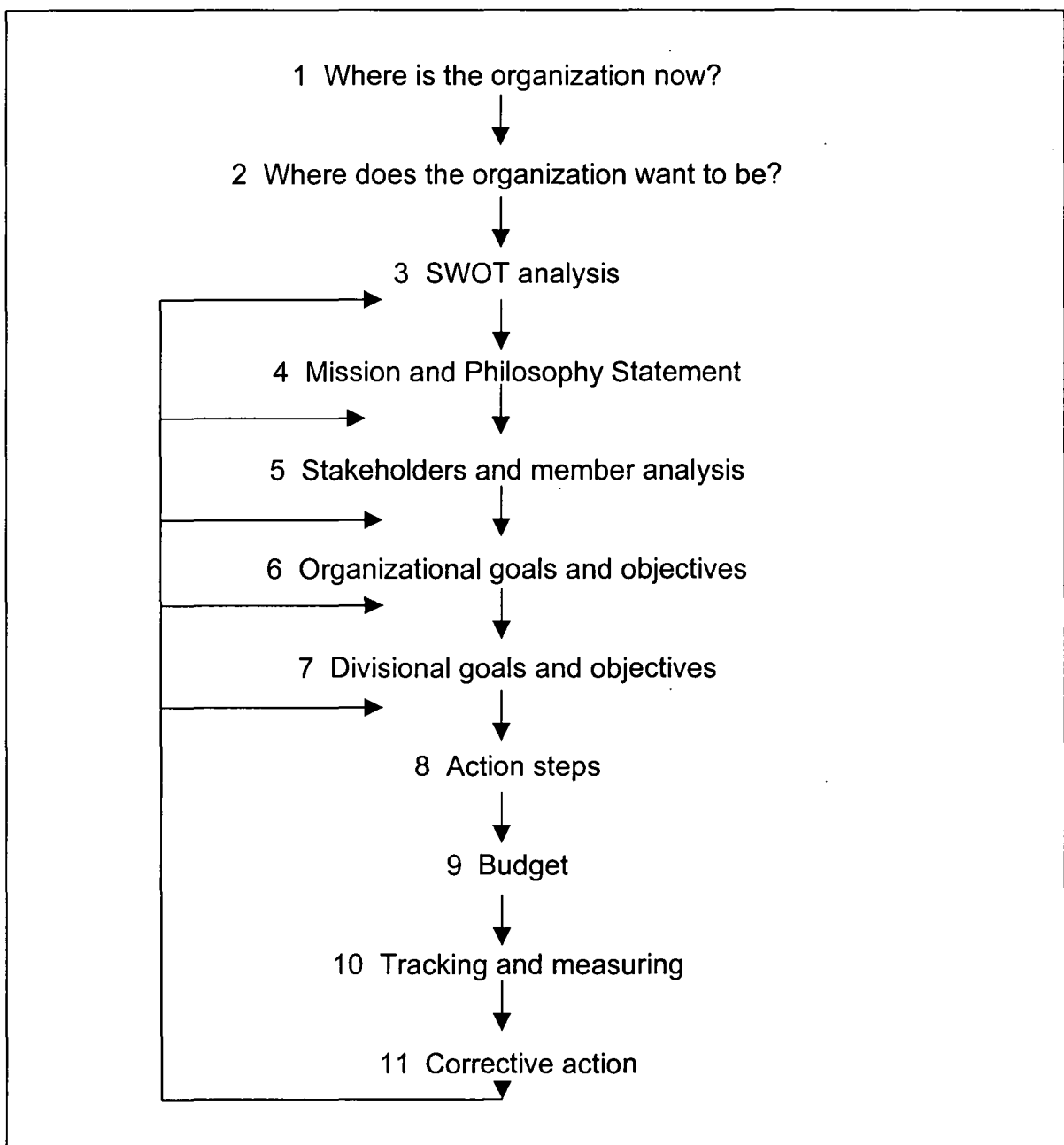
Figure 3.1: The strategic planning process

3.2.1.1 Fundamental organizational issues

The first step in the planning process is to determine where the organization is at present.   Examining the organization's identity and present position will provide information that is important in deciding where the organization wants to be. Areas examined usually include personnel, the products of the organization, services rendered, the operations of the organization, and physical facilities.

(a) What business is the organization in?

The question "What is the current mission of the organization?" should be posed.   The immediate answer to this question is usually oversimplified. Examples such as "The organization does missionwork" or "We are offering education for missionaries" fail to incorporate all the tasks and services of the organization.

Listing the different aspects of the services provided by the organization will alert members to the fact, for instance, that the organization is working outside the scope of its mission or that less time and fewer resources are being allocated to its primary task.   Acknowledging that the business of the organization has or has not changed in exploring the needs, and the options available.   Change is normal as long as it is recognized and dealt with in a productive manner.

Espy (1990:144), for example, states that clarifying the business of the organization is important for a number of reasons:
* Knowing where the organization is will help it proceed effectively with its plan;
* It is important for fundraising,
* It is difficult to market the services of an organization whose mission is not
   clearly defined;
* Staff need a unifying concept of the organization's activities; and
* People that the organization helps should know what it is the organization
   does.

(b) What business would the organization like to be in?

Creative thinking concerning the destination of the organization is also vital. Every possible idea needs to be put on the table, no matter how outrageous.

(c) The SWOT analysis

The following step in the process is the SWOT analysis. It is a technique widely used in business, and examines the organization's strengths, weaknesses, opportunities and threats. In this approach both the internal and external environments are examined. Fundraising success depends on an organization's ability to adapt to surrounding conditions, but there is also risk involved.

If organizations that respond to changing needs dramatically alter their value systems, their future is at risk. Organizations cannot and should not become fully responsive to the market in order to enhance their fundraising. This is especially true of religious and in this case Christian organizations. They need to remain in harmony with the Christian values and mission upon which they are founded.

Strengths: In the first step in the process - to identify the organization's strengths - the discussion should be as specific as possible (not e.g. the office is a strength but the staff in the office is a strength because they are hardworking, well trained and loyal).

Tempel (1991:20) argues that "religious organizations often operate on internal motivations and beliefs without paying much attention to the world in which they exist and how that world views them". They are defined as "closed systems." For most Christian organizations this is a strength. Christian beliefs and values form the basis of the existence of these organizations and, because of these values they draw in and sustain donors with similar beliefs. Only if the organization knows its strengths can these be used to the advantage of the organization.

<u>Weaknesses:</u> Organizational weaknesses can be identified simultaneously with the analysis of strengths. This process however can become threatening, and have negative consequences. If something is seen as a weakness, it can offend the person who feels responsible for that specific issue; it is imperative however that participants feel sufficiently free to express their opinions honestly. It is therefore important that participants are as specific and objective as possible in discussing the issues. Examples of weaknesses can be "high staff turnover"; "difficulties in responding to change" or "the vehicles used for the work are unreliable".

<u>Opportunities</u> exist in many areas. Identifying them allows the organization to plan ahead confidently. Some opportunities can be utilized immediately while others take more time. Examples of opportunities can be: "Bibles that were not available in certain languages are now available ", "countries that were closed to missionwork have opened up" or "areas where missionwork is being done are growing".

<u>Threats</u> are generally external, and relate to circumstances that may be harmful to the organization. Threats might include: "A decline in the economy results in a drop in donations" or "the changing of demographics effects the work being done by the organization". Threats such as these can have major consequences for the organization if the organization remains unaware of them and is unprepared to deal with them.

It needs to be borne in mind that the SWOT analysis cannot be expected to deliver consensus on all issues. The process is utilized precisely to raise different viewpoints and generate ideas. The SWOT analysis is rather a tool for examining the organization's internal structure and operations and its positioning in the environment. Issues discovered can then be given to planning groups to deal with immediately or can be set aside for later. For the fundraising department it is important to know where the organizations' strengths and opportunities lie. It can be used to better the chances of fundraising success.

(d) Environmental scanning and forecasting

Environmental scanning is a continuous process of looking at the world outside the organization. It analyses external data, and identifies opportunities for and threats to the organization. Environmental scanning probably happens informally within many organizations but still needs to be formalized.

* Economic conditions: The realities of funding and the economical climate of the country fall into this category. No other factor affects the organization - in particular the fundraising office - and its work as directly as the economy does. Issues such as interest rates, inflation, unemployment rates and tax rates play an important role in the funding of the organization.

If unemployment rates go up, this effects the organization as less money is available from donors, many of whom lose their jobs. Furthermore prices of certain commodities (such as Bibles and petrol) may need to be closely watched. Higher interest rates however can boost income because older donors who are dependent on interest income will have more money available.

* Legal: Changes in laws or regulations applying to society in general or to non-profit organizations in particular can have a major impact on the organization.

* Political environment: The political environment can also have an impact on the organization. In South Africa, where political change has been dramatic and drastic, this has had a major effect on organizations as well as their donors. New possibilities are opening up for organizations, because communities previously not targeted are now focused on. It can however, have a negative effect on fundraising: More organizations need more money to help these communities previously ignored and therefore less money is available.

* Technological: Keeping abreast of new developments allows the organization

to be in the forefront of new development. Changes in technology can also have a negative effect: For instance, computer technology is changing so fast that it is expensive and time-consuming to keep abreast of it.

* Social: Awareness of social realities is essential to non-profit, people-orientated businesses. High divorce rates and two-career families are only two of the trends that effect an organization.

* Demographic: Knowledge of "who is out there" helps to focus an organization, as well as define the market (Espy, 1990:148). Information about the population in a specific area (for example age, language, income and family size) can be useful to the organization. Areas that fit the profile of current donors can then be targeted in order to build the donor base of the organization. Other figures such as population growth, birth and death rates, and employment figures can be of useful to the organization.

* Competition: Knowing the organizations, which are competing for the same donations, is the first step in increasing an organization's donor base. From this, a competitive advantage can be developed and demonstrates what makes an organization unique. Competition in South Africa has currently increased because of shrinking government subsidies as well as the rise of new organizations dedicated to the combatting of, for example AIDS and child abuse.

* Labour market: Both the local and national labour market should be reviewed. Areas such as unemployment rates, wage rates, and educational level should be monitored because they have an impact on the donor's ability to give to the work of the organization.

* Key physical resources: If an organization is dependent on physical resources, such as rented office space, availability and rates should be monitored on a regular basis.

* Suppliers and distributors: Relationships with suppliers and distributors are

crucial to the smooth running of an organization. These relationships should be re-evaluated regularly by analyzing past problems, talking to competing suppliers and distributors and comparing costs and services rendered with the organization's present suppliers and distributors.

* <u>Other areas</u>: Anthony (1988:8.8) suggests that an organization should look at transportation, energy supplies and international conditions. If transport is a major part of the organization's budget this should be reviewed on a regular basis. International conditions such as the political and economic state of other countries might have a major impact on the organization. If the organization does missionwork with people from other nationalities, for instance, this has a direct bearing on the work being done, especially if there are problems in these people's home countries.

The information gathered should then be categorized as to whether the organization sees it as an opportunity or a threat. The next step is to complete an environmental forecast, which is perhaps nothing more than an "educated guess". The idea, though, is to identify existing trends in different environmental sectors and to speculate as to how these trends will continue during the planning period. It is best to use a group of people who know what is happening in the environment (Anthony, 1988:8.11).

(e) Identifying the givens

In any organization there are a number of elements that are not open to change. One of the Christian organization's givens is that it is "Christian". This limitation on change is usually imposed by those who establish the philosophy by which the organization exists. Other givens are the way fundraising is done, and must also be identified. Identifying these givens defines the organization's character.

3.2.1.2 Organizational identity issues

Once the organization and its environment have been scrutinized the planners need to summarize what they have learnt. Now is the time to develop specific, written statements of the organization's identity, which should help define the organization to staff, stakeholders, donors and the public. This will include a mission statement, a philosophy statement and the identification of stakeholders, which will be important for fundraising if it is to be successful.

(a) The mission statement

The first statement to be written must be the mission statement. Every organization should have a mission as, according to Espy(1990:149), the mission statement captures the essence of the organization. This statement must be unique to the organization; it must distinguish the organization from all other organizations and must be used for planning.

Espy (1990:149) and Anthony (1989:8.18) argue that a good mission statement should:

* Encompass the services and programmes in a way that is broad enough to be inclusive but narrow enough to be meaningful.
* Not exceed the limits of human memory. It should be short: no more than a few paragraphs.
* Have an element of "zinginess" and may be useful for marketing, fundraising and creating public awareness.
* Indicate what line of business the organization is in. It is not necessary to list all products and services, only to identify the broad classes of products and services rendered.
* State the geographic market served.
* Have an ongoing nature. It should last for at least 4-5 years without major changes.
* Tell how the organization is different from other organizations in the field.
* Be consistent with the mission of the divisions.

* Be understandable. It should be written to "express" not impress.

The mission statement is probably one of the most used documents in the fundraising office. It forms the core of the fundraising plan: It includes relevant information that needs to be communicated to donors and possible donors. It is also usually the first document given to first-time donors. If the organization fails in writing a good mission statement its fundraising is already at a disadvantage.

(b) Organization values and philosophy

A well-defined philosophy statement should back up the mission statement. The philosophy statement defines the fundamental beliefs of the organization. This should unite the staff as well as the stakeholders and give a clear message to the outside world. In a Christian organization, its Christian beliefs will clearly be identified.

(c) Identification of stakeholders

It is important to know who has the organization's welfare at heart. When organizations identify their stakeholders they know who is served by the organization and who will support it financially. These people must be thoroughly understood because they are the reason why the organization is able to exist. If the organization cannot meet their needs it will cease to exist.

3.2.1.3 Goal Development

Issues emanating from the internal and external scanning of the organization, should now be translated into organizational goals and objectives. These should be made on an organizational level as well as within the different divisions of the organization. It is crucial to the organization's success to have clearly defined goals and objectives, for the following reasons:

* Many goals are value-laden. People's values differ and because of this

everyone has a different view of how a value-laden goal should be accomplished.

* Goals may often be deliberately vague, such as "To carry out missionwork". The thinking is that this makes the organization more likely to secure the support of diverse donors and are less likely to invite close scrutiny and debate. This thinking is invalid because, without clear goals and objectives, the organization has no way to measure its progress or effectiveness.

Espy (1990:152) defines goals as "statements that describe broad abstract conditions. They define the desired destination of the organization." Examples could be: The organization wishes to evangelize 3000 people within 2 years or the organization wants to canvass 200 new donors this year. A clearly written goal will be specific and must include time frames.

Espy (1990:152) then defines objectives as "statements that describe specific, desired results and actual actions for achieving those results". An example of one objective for the above mentioned goal would be: "Five teams comprising of two persons each will visit the hospitals in Cape Town to do evangelistic work."

(a) Organizational goals

The organizational goals should state the priorities for the entire organization for the period covered by the plan. It should give direction for divisional goals as well as relate to the mission of the organization.

Normally an organization should write only three to five organizational goals during each planning period. These goals can be revised during the planning period but once they are fixed they are not easily changed.

Organizational goals are important because they:
* Help set priorities.
* Focus the organization efforts.

* Aim resources at a few very important targets.
* Play an important role in communication. They communicate to others outside the organization as well as to those inside.
* Help managers set individual objectives and priorities.
* Are proactive. They help the organization take action when faced with challenges.

(b) Divisional goals

The development of divisional goals must correlate with the organization's overall goals. They help managers to manage more efficiently, to develop guidelines for operations and to measure performance.

(c) Fundraising goals and plans

It is logical to accept that donations come from outside the organization. Unfortunately not everything in funding can be directly controlled by the organization and it is subject to conditions of the economy, regulatory changes and the fancy of donors. It requires long-term commitment to build a donorbase that is stable. Long-term planning can include the development of an annual giving programme, giving programmes for specific projects or a programme to promote bequests. Within the framework of long-term planning, goals can be set for donations received. It is not always possible to determine how many donations will be received, but it is possible to place expectations on funds received based on the history of giving in the organization. Setting goals makes it is easier to measure the success or otherwise of plans.

(d) Developing and writing objectives

In order for the strategic plan to become a reality, it must be made operational. It deals with three basic questions: **Who**? Will do **What**? by **When**? Objectives flow from the goals and must be consistent with the mission. According to Anthony (1988:8.21) the following are criteria for good objectives. They should:

* Relate directly to an organizational goal.

* Relate to the mission of the organization.

* Be clear concise and understandable.

* Be stated in terms of results.

* Begin with "to" and an action verb (Example: to increase).

* Specify a date for accomplishment.

* Deal with one major subject.

* Tie in with upper- and lower-level objectives.

* Be quantifiable.

(e) Developing action steps and schedules

In this phase specific steps and timetables are written for each objective. It deals with the how and when of the process.

Those people who will be responsible for carrying out an objective should be tasked with determining the action steps and have some say as to when they can be accomplished.

(f) Tying the plan to the budget

When objectives, goals and action plans are in place, the plan should be tied to a budget. Gross & Warshauer (1979:316) state that a budget represents the organization's goals and objectives for the coming months or years expressed in monetary terms.

The main points in a budget are that:

* Workers know exactly what is expected of them.

* It is a means of communication.

* It helps to co-ordinate the different activities of the organization.

* It is a means of control.

* It creates awareness that plans can change.

* It educates managers as to their responsibilities.

(1) Prerequisites for successful budgets

De Klerk and Du Plessis (1990:152) give four prerequisites:

* <u>Healthy organization</u>. Budgeting enhances the organizational structure. It is important to know who carries the responsibility and authority for each division in the organization as well as who has the final say over the budget.

* <u>Satisfactory accounting system</u>. The history of the organization is very important in planning. The accounting system should be able to recall historical data, which is needed in the budgeting process.

* <u>Research and analysis</u>. When doing research and analyzing the history of the organization, attention should not only be given to the successes of the organization but also to those goals and objectives that should have been achieved and were not.

* <u>The support of the board</u>. As with the planning, if it does not come from the top (the board and trustees) it will not be successful.

(2) Budgeting's basic phases

There are three phases in the budgeting process: preparation, comparison and reaction.

* <u>Budget preparation</u>: A budget cannot be prepared until the organization's policies and plans have been finalized. Without clearly stated goals and objectives the organization is unable to make useful estimates for the future. In the <u>long-term</u> the organization must examine its primary service to

the community it serves and determine whether this need will still be present in five years time. In the <u>short-term</u> the organization must establish basic policies in areas such as wages and salaries, level of employment, level and type of service, and capital expenditures. As already stated, the board of trustees needs to approve this and be committed to it. The budget(s) of the organization will give a clear indication to the fundraising department what funds are needed for which projects. An example could be: A vehicle is needed for the new missionary worker that will also be appointed. The cost involved would be R95 000,00. In turn the fundraising department needs to budget for this together with all the other funds needed for the work.

* <u>Budget comparison</u>: The second phase involves comparing actual results with anticipated results. Monthly as well as year-to-date comparisons should be done because fluctuations on a monthly basis tend to level out over the course of a year. This comparison should be done on a regular basis or it will not serve its function as a control mechanism. With a history of giving, the fundraising department can have comparative figures available to measure the progress of the fundraising and compare this with anticipated and actual results.

* <u>Reaction phase</u>: If the budget is to be meaningful, there must be several possible responses to differences between the actual and anticipated results. The organization can for example decide to continue on its course or it can change procedures. If for example there is a difference in budget and actual the fundraising department must decide how this can be rectified.

(3) Approaches to budgets

For the purposes of this study two approaches to budgeting are discussed:

* Incremental budgeting: This is "add-on" budgeting. The budget for the

previous fiscal year is taken as is and a new portion is added to it for the coming fiscal year. The new portion can be determined in several ways. For example, by adding an inflation factor or adding the total cost of new projects to last year's budget. It is a common method of budgeting because of its simplicity.

The disadvantages of incremental budgeting are that the organization accepts last year's figures as a given and does not review whether the money spent last years should at all be spent this year.

* Zero-based budgeting: This is a more complicated method because it builds the budget from "zero" and uses the objectives laid down in the planning for this process. The greatest disadvantage is that it takes time and is less streamlined than most other methods.

(4) Types of budgets

The most important budgets within a nonprofit organization are probably the revenue budget, the expense budget and the cash budget. After these budgets are completed they are then integrated in the main budget of the organization.

* Revenue budget

A revenue or income budget is a summary of all the income plans for a given period expressed in measurable terms. It should be prepared annually and then be subdivided into monthly or quarterly periods for purposes of comparison.

There are two possible ways to prepare the revenue budget. Either it is the starting point, in which it acts as the foundation for periodic planning or it can be prepared after the expenses of the organization have been budgeted for. In the latter case, revenue is then obtained in an effort to cover the expenses, but this could create problems. The incentive to keep expenses

down will be lessened because it is expected that the expenses will be covered.

In forecasting the income of the organization the history of previous giving is examined and is then based on internal and external factors that might influence these projections. When forecasting revenue it must be remembered that there are different kinds of giving: regular gifts which are received on a weekly or monthly basis, seasonal gifts such as donor club fees, and random gifts which include grants or bequests. Other considerations such as a new service, pricing of services given and the capacity of the organization must also factored in.

* Expense budget

The expense budget answers the question "Where does the money go" and concentrates on operating, administrative, fundraising and other expenses. Four different categories are important. Once the behaviour of the expense has been identified, the amount to be budgeted can be determined. There are four major kinds of expenses that need to be addressed: variable, fixed, mixed and step.

Variable expenses mean that a cost moves in direct response to a certain activity. If the activity increases the cost will also increase, and vice versa. For example: More teams are doing evangelism work, therefore more Bibles and other literature will be needed or more mail shots for fundraising purposes are planned therefore more money will be needed.

Fixed expenses are expenses that are not influenced by changes in activity. These costs arise from the possession of (for example) property and equipment. The level of activity will not influence insurance on these items or rent paid for their use. These costs are the easiest to budget and control but the most difficult to reduce or eliminate.

Mixed expenses are a combination of variable and fixed costs. A good

example of a mixed expense is utility costs. Utility costs, especially electricity, include a fixed demand charge as well as a minimum charge for usage, regardless of activity level. Additional cost then varies with usage beyond a certain level.

Step expenses are fixed costs that can be changed by administrative decisions. For example it can be decided that no resources will be allocated to a specific use or that a staff member may be dismissed with no replacement planned.

In the final budget all the expenses are accounted for and should convey to everyone in the organization what the guidelines for expenses are.

* Cash budget:

De Klerk and Du Plessis (1990:168) define a cash budget "as a tool, in the form of a statement, which contains an estimate of all the outgoing and incoming amounts during a particular future period. The budget answers the important question whether the organization has sufficient funds (cash) available to ensure continuity."

A balance should be created between a shortage in cash on the one hand and an abundance of cash on the other. The cash budget can be drawn up on a monthly, weekly or even daily basis but, in an organization with a reasonably stable cash flow, monthly cash budgets are sufficient.

The best place to start looking for sources of cash is the revenue budget. This budget can be used to identify cash inputs such as donations (weekly, monthly or annually) and investment income. Financial activities are another source of cash. An organization may for example be able to establish a line of credit with a bank or it can provide additional sources of cash by selling physical assets.

In analyzing the uses of cash the place to begin should be the expense

budget, which identifies the cash needs of the organization. The fundraising department is one of the departments that will be part of this process. Everything from salaries, equipment, to stationary must be budgeted for. Another important use of cash is capital expenditure if it is planned for the planning period as well as the repayment of a debt.

* Other budgets

A variety of other budgets may also be prepared. Some may be prepared for external parties. For example, budgets are often included in grant requests. Special project budgets are also part of the planning process. These budgets focus on specific events planned by the fundraising department of the organization. They establish a clear signal about how much money will be spent and what the possible income should be.

(5) The budgeted income statement and balance sheet

The ultimate aim of the integrated budgeting system is to include all the sub-budgets (including the fundraising department budget) in the budgeted income statement and balance sheet. The board will have a summary of the expected trends during the period for which the budget is drawn up and it is then possible to determine periodically to what extent the plan is succeeding.

(g) Tracking and measuring

The organization needs to monitor the strategic plan of the organization. With fundraising it is necessary to keep track of progress on a monthly basis at least. In some instances such as special events and donor acquisition the organization needs to keep track on a daily basis of progress being made. According to Anthony (1989:8.25) the characteristics of a good tracking system are that information:

* Should be received in time in order for the organization to react on that

information.

* Should have a high degree of accuracy.

* Ought not to cost more than it is worth.

* Enhance the ease of access and update by being computer-based.

* Should be in the language and formats that the organization wants it to be.

* Information should be relevant.

* Should be delivered via the appropriate media.

(1) Systems for corrective action

It is very seldom that actual performance exactly matches planned performance. Consequently a system of corrective action is needed. This system is designed to bring performances that are out of line back on track and usually addresses at least one or all of the following factors: performance of people, of machines or equipment and the adequacy of goals and objectives.

Performance of people may be deficient for a number of reasons:
* They do not know what is expected of them.
* They may not have adequate education or training to carry out the plan.
* They may not want to carry out the plan.
* Emergencies and crises may be so frequent that they are discouraged from carrying out the plan.
* Work overload can keep people from reaching objectives.

All the above reasons can be linked to the planning period. If the fundraising staff is not involved with the planning they will not know what to do and may not want to do what is expected of them. When planning is done and the training is not up to standard the same problem will arise. Together with that work overload is probably one of the biggest problems within fundraising because that is where organizations usually cut first.

Performance of machines and equipment: Objectives cannot be met if

people do not have the right equipment. The plan should be able to determine the impact of tools and equipment (such as computers, other office machinery and office furniture) on meeting the objectives. For example it cannot be expected of the office to thank donors within 24 hours if they do not have the necessary computer equipment.

Adequacy of goals and objectives: The organization may not reach its objectives because of poor planning. The objectives may have been too high or unclear or it can not be measured. For example: An organization that only have 1000 donors can not reasonable expect to receive R1000 000,00 annually from those donors.

Corrective action systems are most effective if they are:

* Timely - it should bring performance back on track before it gets out of hand.
* Future-oriented - it should concentrate on the future, not the past.
* Positive - it should bring about positive change not punishment.
* Preventative - it should prevent it from happening again.

3.3 PLANNING THE PUBLIC RELATIONS PROGRAMME

The *Glossary of Fund-Raising Terms* (1986: 82) define public relations as "The practice of developing the reciprocal understanding and goodwill of an organization and opinion leaders and the general public" and publicity as: "Any event or communication, through established media or otherwise, free or paid, solicited or not, that attracts attention to an organization."

Conners (1988:40.3) maintains that there are two kinds of programmes: Remedial and planned. In the first programme public relations staff spend their time putting out "fires" caused by damaging communication that happens when there is no planning. A planned programme is based on facts, has goals and objectives and is sufficiently flexible to change if necessary. The public relations department is closely linked to the fundraising department. Both work with the organizations' publics, the one creates awareness while

the other raises funds from those publics. It is difficult to raise funds from the public if they are not aware of the organization and its work.

3.3.1 The planning process

The planning process involves four basic steps: Fact finding, planning, communication and evaluation.

3.3.1.1 Fact Finding

Two categories of facts are needed: facts about the organization itself and facts about the public with whom its is trying to communicate. Facts about the organization include history, programmes, planning, budgets - everything that is determined during the strategic planning process as well as one other important fact: The attitudes about the organization held by both the public as well as the organization's members.

Given limited resources, the organization must focus on selected publics and distinguish among its primary, secondary and tertiary publics. The primary publics are those that interact with the organization on a continuous basis (clients, employees, trustees and donors); secondary publics include suppliers, dealers, government groups and competitors; and tertiary publics include amongst others general-purpose groups such as labour unions and other charitable organizations (Kotler, 1982:383).

Fact-finding methods include listening, using panels and advisory committees, mail analysis and more expensive methods such as in-depth interviews and postal questionnaires. From the organization's point of view it is important to set up relations with its publics that produce satisfactory results. If what is offered is acceptable to its publics, the work of the fundraising departments will be made much easier.

3.3.1.2 Planning

The first step in the planning process is to establish objectives, which should coincide with the overall objectives of the organization, including those of the fundraising department. If the fundraising department for example is planning a special event, an awareness campaign is needed if it is to be a success. This then should be planned together with the fundraising department.

In deciding on the objectives, the needs of the publics are paramount and should encompass the service provided to the public, the resources available and what staff think of the objectives.

Conners (1998: 40.5) states that the plan should include the following elements:
* A summary of the facts revealed by research
* A statement of the planning stages
* Analysis of the competitive factors affecting the programme
* A statement of priorities, timetables and media for carrying out the programme
* A description and analysis of the publics
* A description of the methods of programme implementation
* An outline of the organization and personnel requirements needed
* A list of examples of subject matter (articles, news releases)
* A prepared budget

3.3.1.3 Communication

In terms this process the personnel select the key publics that have to be reached and the type of information that needs to be transmitted to them. They must also have a good working knowledge of the mass media available and have to be able to communicate within the organization itself.

The public relations mechanisms that are available include:
* Written material such as annual reports
* Audio visual material such as slides and videos
* Corporate identity media (The organization needs to create a corporate identity.

Everything from the stationery to the buildings needs to have the same identity.

* News about the organization to market to the appropriate media, such as newspapers, radio, television, magazines (The vehicles used to deliver the news can include printed news releases, answers to queries, interviews, news conferences, tape recordings and photographs released with captions and videos).

* Events.

Most of these mechanisms will also be used in the fundraising department

3.3.1.4 Evaluation

To be effective, the public relations programme needs laid-down procedures, and a specific budget for the proper feedback and evaluation of the programme. Formal evaluation can include opinion polls, interviews with key members of the public, or a comparison of the organization before and after implementation of the programme. Informal evaluation, which is less expensive, can include asking the opinions of staff and other organizations, careful monitoring of trends in complaints and amount of coverage received in the media. Once the evaluation has been completed its findings are then used in the new planning cycle.

3.4 THE CASE STATEMENT

In order for the fundraiser to place the strategic plan in fundraising terms, a case statement must be written. *The Glossary of Fund-Raising Terms* (1986: 16) defines the case statement as: "A carefully prepared document that sets forth, in detail, the reasons why an organization needs - and merits - financial support. It documents its services, human resources, potential for greater services, current needs and future plans." It informs donors about the organization, and what it is trying to do and why. The case statement is then used as a resource document for all fundraising efforts.

In preparing the case, there is no substitute for thoroughness. The person responsible (fundraiser) as well as the trustees should help with the preparation. A case is best produced together with a group of businessmen who ask important questions involving

both the board and staff.

Once the case statement has been written (preferably by a single person) the leaders of the organization need to ensure that it is acceptable. The length of the document depends on the purpose for which and the manner in which funds are to be solicited. Again, simple language should be used as graphic representation.

3.4.1 The internal case

The internal case is a database of information that supports the preparation of documents and publications that explain the work.

Rosso (1991:40-43) states that the following twelve elements of the case make up the internal case. Most of the information has already been gathered in the strategic planning process and should now be stored for easy access when promotional materials are being prepared.

* Mission: The mission states the organization's reason for being. It must answer questions as to who the organization is and why it exists.
* Goals: The goals concern themselves with the question "What does the organization want to accomplish".
* Objectives: The objectives are expressed in specifics and are stated goals with measurable terms that are realistic and achievable.
* Programmes and services: The mission, goals and objectives must take shape as activities within a plan of action.
* Staffing: Documentation identifying all staff members and volunteers should be kept on file and up to date.
* Governance: The board of trustees is a central element in the structure of the organization. Information about each trustee should be on file and up-to-date.
* Facilities: Information about buildings, land, furniture, equipment, and so forth is critical. It can be used as support of major gifts and capital fundraising campaigns.
* Finances: The organization must be accountable. Information such as budgets, financial statements, annual reports, fundraising cost analysis is critical if it is to

be successful in raising funds.

* Statement of needs: A current, regularly updated statement of what is needed is essential for the fundraising manager.

* Planning: Strategic planning is essential if the organization is to survive. This is extensively used when the external case is written.

* Evaluation methods: Trustworthy, accurate and honest evaluation of the organization and its programmes is a key to accountability.

* History: History substantiates. The case files should stockpile stories of accomplishments, mistakes, renewal experiences and "heroes". The more the organization has, the better the chance of making the right choices when writing the external case.

Now that all the information needed is available for easy use the external case can be written that will be used by the fundraising department.

3.4.2 The external case

Rosso (1991:43-44) explains that the external case "tells the story to the organization's constituencies." A cogent reason for a donor supporting an organization is a strong belief in the organization, especially as it has been determined that people give to "people" and not to organizations. The organization is only the go-between. Financial problems should not command a central position in the organization's case expression. The external case presents the cause of the organization in the form of a brochure, a letter, an annual report, a speech or a presentation to a foundation or corporation.

Since these whom the organization will contact differ in degree of interest and financial ability, different case statements are written for different audiences. It is consequently even more important to have a good internal case. The more information that is available the better the possibility of making intelligent decisions. In deciding what to write, two questions should be answered: How much does this constituency know about the organization? How much does this constituency care about the organization?

A working sequence might take the following form:

* Identify and validate needs. These are the human needs reflected by the mission.
* Identify programmes and strategies designed to address the need. Provide enough information to show that programmes can solve the problems.
* Explain who will benefit from the programme. The programme will not only benefit the person who is being helped but also her family, neighbourhood and community.
* Identify the resources that are required to fund the programmes. Explain and identify the cost of funding the current programmes.
* Explain why the potential donor should give. The case should help him or her understand the validity of the need, the importance of the gift and the justification for the solicitation.
* How can the prospective donor give? The case should list the variety of gift opportunities that are available.
* Respond to the unasked question, "What is in it for the donor?" It should offer something in return for the donor, even if it is of a spiritual nature. People give because it creates a feeling of being needed and not only because the organization has asked them.

3.5 SYNOPSIS

Many organizations appoint a fundraiser and expect the fundraiser to immediately bring in funds. In cases where organizations think they cannot afford a full-time fundraiser, one of the workers is given the job, on top of his own workload, because "it cannot be that difficult to bring in funds." This causes frustration, despair and many times the worker leaves the organization because he or she cannot cope with the pressure.

This chapter has argued that it is necessary to prepare the "scene" for the fundraiser. The fundraiser cannot operate properly if he or she does not know who the organization is, where it is at present, where it is going, how it is going to get there and how it is going to know when it has arrived. This is where strategic planning comes in.

Strategic planning goes through the following process: It starts with the question of where the organization is now. This is followed by the question as to where the organization wants to be. Then a SWOT analysis and an environmental scan are done. The SWOT analysis determines the strengths, weaknesses, opportunities and threats of the organization internally as well as externally and the environmental scan looks at the world around the organization and determines whether factors such as the economy and the political environment will have an impact on the organization.

Together with this, the organization also needs to determine its mission and philosophy statement. Only after this has been done can organizational and divisional goals be written. This is followed by the writing of objectives and action plans for each of these goals which are then tied to a budget. If the planning is to be successful, the performance of the plans should be tracked and measured and, if necessary, corrected.

Out of this planning session a fundraising document, the case statement, is prepared for use in the process of soliciting funds. The internal case statement will have all the relevant information the fundraiser needs to do the job, while an external case statement is written to tell the story to the organization's donors. Only then can the fundraiser start with the job of fundraising.

4. SOURCES OF REVENUE

4.1 INTRODUCTION

After preparing for fundraising the fundraiser must determine the sources of revenue. In other words, the fundraiser must now determine from where the money will emanate.

It is a misconception that the buildings, personnel and programmes of an organization constitute an organization. Those whom the organization serves are the heart of the organization and it exists only because of them.

In order for the organization to serve those people who form the heart of the organization, its constituents, the organization must "know" them. To be able to do this, the organization needs to identify them, define their needs, discover how they identify with the organization, and then respond to their needs effectively.

The fundraiser, in the search for funds, must keep in mind that within the constituency of the organization he or she will not only find people who will be willing to give donations to the organization, but also people who will be willing to serve on committees and give their time and expertise.

From a Christian organization point of view, it is logical to assume that, if a Christian organization's primary goal is evangelism and missionwork, its constituency is already narrowed down to mostly Christians. This being the case, it is still important for the organization to identify those Christians who are willing to support the specific organization. If the organization's goal is connected with social welfare, the possibility of non-Christians donating time and money will naturally be greater.

Only after the constituency has been identified can the organization identify sources of revenue within their constituency. For most organizations there are three sources of revenue: Individuals, corporations and trusts, of which individuals are by far the largest source of revenue for Christian organizations (Rosso, 1991:230).

4.2 THE CONSTITUENTS

In theory the "world" can be seen as the constituency of the organization, however, in practice, the fundraiser needs to focus only on those who will be the most likely to support the organization and its goals.   Rosso (1991:30-33), for instance, represents the constituency relationship by means of an ever-widening ripple. The middle of the "circle" (1) represents the core of the constituency. At this point the relationship with the organization is more lasting and at its strongest, with the three groups forming the core of the circle.   These are the board of trustees, the management team and the major contributors.   The second "circle"(2) includes administrative and service volunteers, employees, those who are being served and "general" contributors (those who make smaller gifts).

The third "circle"(3) includes past donors and participants, while the fourth (4) presents the unknown potential - a large number of people who can be invited to become donors. Beyond the fourth circle (5) there may be a constituency of unknown potential.
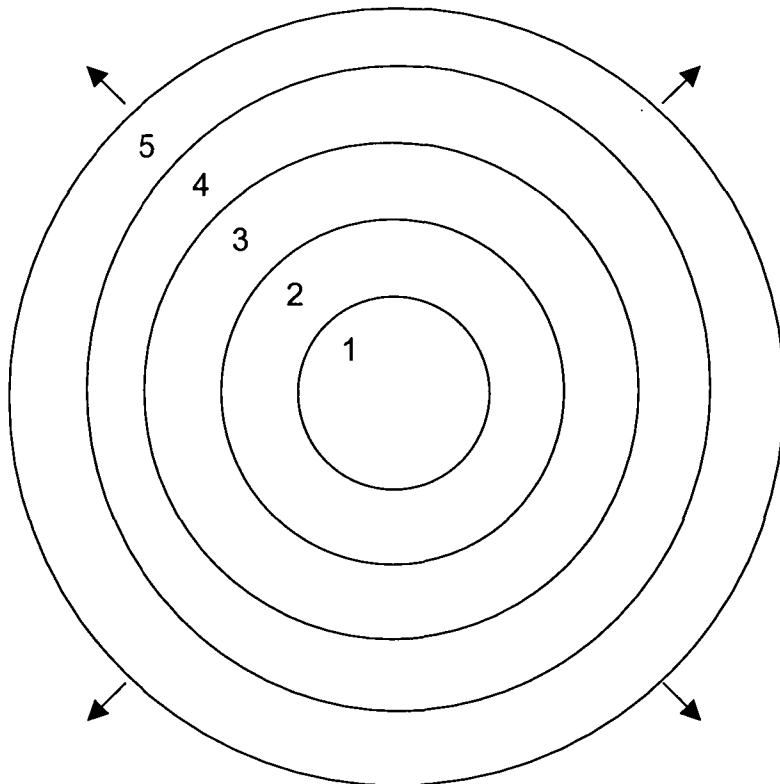
Figure 4.1 Constituency of the organization as adapted from Rosso, (1991: 31)

4.2.1 How to identify constituents

To help the fundraiser with the important task of identifying donors for the organization, a research concept known as the L-A-I Principle has been developed. This principle helps to separate "suspects" from "prospects.

* A <u>suspect</u> is someone whom the organization believes can make a gift -- this is usually based on ability only.
* A <u>prospect</u> on the other hand is someone from whom the organization expects a gift based on known linkages, ability and interest. As organizations can expect an annual change of between 20 and 35 percent in its constituency base, it is important to remember that the identifying of prospects is an ongoing process.

* L - Linkage: There needs to be a connection between the organization and the potential donor. If there were no connection it would be difficult to contact the latter donor. For example, if a Christian organization asks a non-believer for a donation there is no "link".
* A - Ability: This is the ability of an individual to make a meaningful donation to the organization.
* I - Interest: If the potential donor is not interested in the organization or has little knowledge of its work, the person will probably make a small gift or no gift at all.

It is imperative that all three principles are applied in the identification of a possible donor during the evaluation of gift potential within the constituency.

4.2.2 Who gives?

It is a truism that people are the central force in building the constituency of the organization. Whether the organization is visiting a trust, a corporation or a home for the purpose of seeking a donation, it is negotiating with a person or a group of people. There is one central principle in fundraising: People do not give to causes. People give to people with causes.

There are three major sources of funds: Individuals, corporations and trusts.

Individuals are the largest source of revenue for organizations, especially Christian organizations.

4.3. INDIVIDUALS

4.3.1 Who gives?

According to *Giving USA 1995* (1995: 47), individuals gave 80.9% (bequests included) of all charitable gifts in the USA in 1994. In 1996 this figure was 80%. (Fundraising seminar: 1998). *Giving USA 1995* (1995: 13) states that contributions to religion (including churches) in 1994 made up 45,3% of total giving and, in 1996, 46,1% (Fundraising seminar: 1998). Giving USA indicates that most of the donations received for religion came from individuals (1995: 47).

Flanagan (1991: 17,18) indicates that the average American gives between 1% and 2% of their income (in 1994 it was 1,84%). Surveys of volunteers and giving in America show that: 48% of money comes from households with incomes under $30000; 75% of Americans reported that they gave money to charities in 1990 rising to 78,2% in 1990; 14% of Americans revealed they would have given money, but nobody asked them; 38% say they wished they had given more money.

In Britain, 80% of the adult population- some 25 million people - gives something, and 65% give time through volunteering (Clarke, 1993:57). In South Africa not many statistics are available but a study done in 1992 by The Development Resources Centre shows that 74% out of a total of R10.1 billion in donations was received from individuals.

4.3.2 Why do individuals give?

Individuals give because of an urgent need within a community and they respect the organization's commitment to carry out programmes to meet this need. Individuals tend to give from three sources: Disposable income, capital funds and estates. People with strong religious beliefs tend to give sacrificially, the majority of

individual donors will not make a gift that will compel them to give up something important to them.

4.3.3 The fundraising pyramid

The pyramid is a tool that is used to show how the organization cultivates donors from a first donation up to a bequest. For the South African fundraiser to tap into the 74% of donations received from individuals, a strategy needs to be developed in order to balance the maximization of gifts per donor with the skills and resources available and necessary to do so (see figure 4.2). The pyramid takes the individual from the point of being a suspect to that of a prospect, a first time donor, a renewed or upgraded donor, a major gift donor, a capital donor and a planned gift donor.

1. Universe of suspects/prospects: This group includes anybody who is able to donate to the organization:

* Trustees and boardmembers of the organization. If the trustees, boardmembers and staff do not support the organization financially, it will be very difficult to ask someone else to support the organization.

* Current clients. Clients of the organization come in contact with the organization on a regular basis and this gives the organization the opportunity to cultivate a relationship with them.

* Member-get-member and donor-get-donor. It is easier for a person who is involved with the organization to talk about it and cultivate others around him or her. These individuals have access to people where the organization does not, and they usually are very good ambassadors for the organization.

* Projects and special events. Special events draw people into the world of the organization. For example, if a concert is organized people will come to the concert to enjoy what will be performed and not necessarily because the organization is hosting it. In this way the organization is brought to the attention of

the audience.

* Meeting people. When meeting with people outside formal working hours there is always a chance to talk about the organization in an informal manner.

* Telephone calls and writing to individuals. This enables a list to be built up either for personal contact or for postal appeals.

* Advertising for support through inserts in newspapers, magazines and newsletters. Although this medium is expensive, it can be used when the organization has something very special to say. This medium is usually employed for awareness raising rather than for support raising.

* Donors to similar organizations and people with similar interests. These people are excellent prospects for the organization.

* Purchasing or renting lists of names and addresses. After profiling the organization's donors, it is useful to buy or rent lists of names that are similar to the donors which the organization already has.
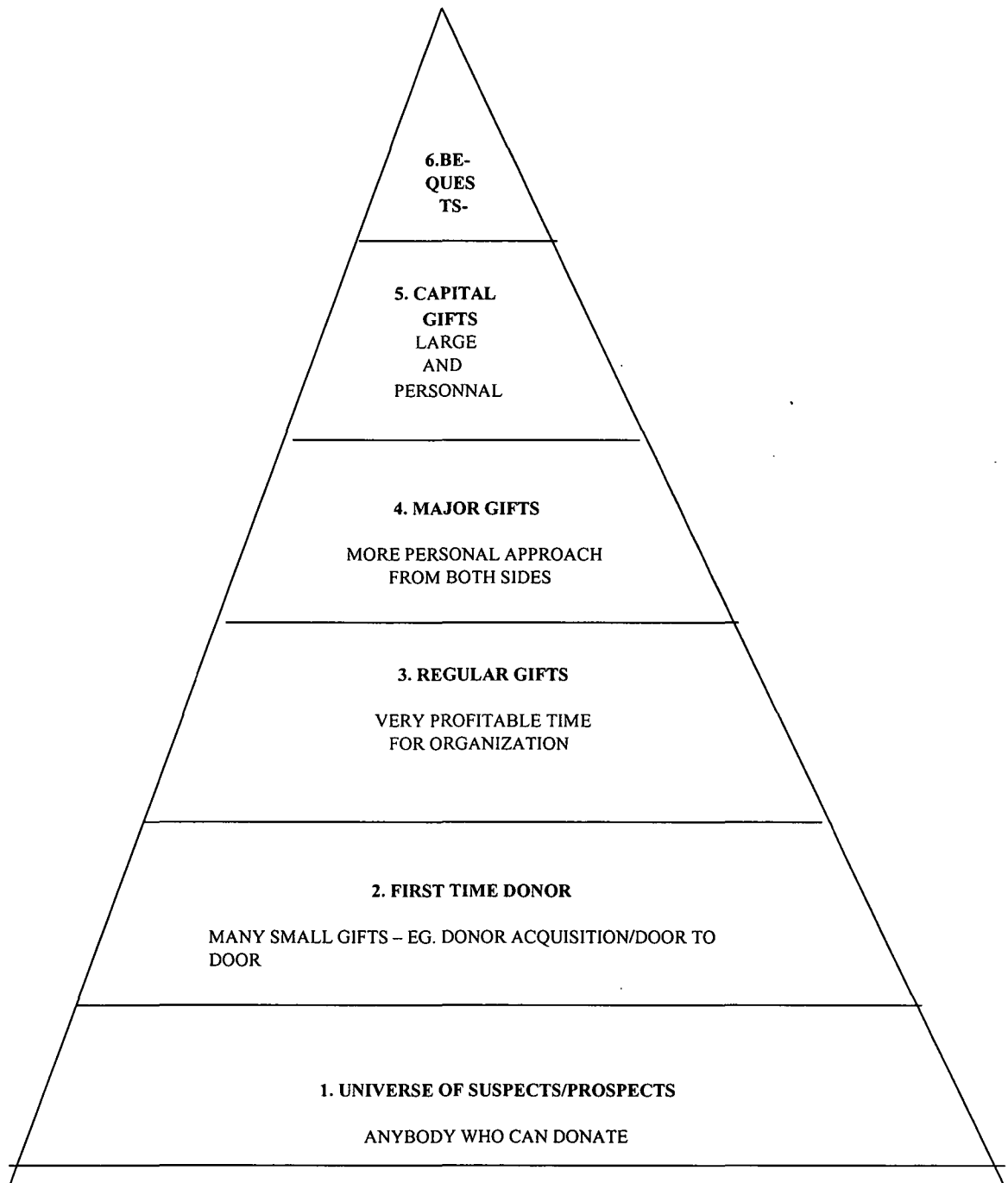
Figure 4.2 The donor pyramid as adapted from Downes (1987: 86)

2. First-time donor: This level on the pyramid can only be reached if the organization starts to acquire donors. The term used for soliciting first ever donations is called donor acquisition. Most of the times the first gift by a new donor is small and the cost involved to acquire the donor is usually greater than the actual gift received. The important thing to remember is to reach as many first time donors as possible. The broader the base of the pyramid, the more lucrative the steps higher up becomes.

3. Renewals and regular gifts: This is when the donor gives again. Over half of first-time donors will donate a second time and over 75% of second time givers will donate a third time (Downes, 1987:86,87). Renewals are very profitable, especially where donors are asked to give on a regular basis. Statistics indicate that some 20% to 30% of new donors still support an organization ten years later if they are well looked after (Downes, 1987: 87).

4. Major gifts: By keeping the history of giving by donors, those who have given larger gifts and on a more regular basis can be identified. They can be approached personally and asked to increase their gifts, becoming committed to the cause. At this stage, donors feel welcome and part of the organization. They contact the organization on a regular basis and perhaps even come to visit. This gives the organization the opportunity to talk to them about a major gift.

5. Capital gifts: Those donors who have come to know the organization and who are committed to the organization are the donors most likely to make a large, special gift for capital expenditure. These gifts should only be solicited through personal interviews.

6. Bequests and deferred(planned) gifts: The most common planned gift is a bequest to the organization at the time of the donor's death. In America, in 1994, bequests accounted for 6,8% of total giving. Examples of other planned gifts are life insurance policies, works of art and real estate.

The main characteristic of a donor pyramid is that after five years, 80% of funds raised will come from the top 20% of donors. Downes (1987:87) expresses it: "The

broader the base, the more active the organization is to take the donors through the steps of the pyramid, the more money is raised." Once this characteristic is put in use the organization is able to address the problem of fundraising by making use of a "total development programme".

4.4 CORPORATIONS

In the USA, in 1994, corporate giving accounted for 4,7% of total giving (*Giving USA* 1995: 63,77). According to The Development Resources Centre, South Africa corporations gave 8,4% of total donations received in 1992 (DMI fundraising seminar 1998).   Some organizations do well in their seeking of gifts from the corporates while others will either fail to attract support or only raise nominal amounts. Religion and religious causes receive virtually no support from corporations (Rosso, 1991: 230). If the organization is engaged in social welfare, the possibility of receiving funds is enhanced.

4.4.1 Where to find corporations

Where does the fundraiser start? To make it easier, Cuthbert (1995:80) suggests the following sources for company names and addresses:

* "Top-company lists: These provide clues to the financial ability of corporates.
* Association through services: The organization's stationery or office equipment supplier can also become a donor,
* Cultivation through executives: Company directors may already be donors or might be known to staff members,
* Publications: Newspapers and magazines are a source of information,
* Annual reports and reference libraries,
* In-house magazines: Companies have in-house newspapers and magazines and are full of information,
* Yellow pages and other directories,
* Subscription to journals issued by groups such as the South African Chamber of Commerce,
* The local business directory."

4.4.2 Why corporations give

There are many reasons why companies are willing to support causes. If organizations are aware of some of the reasons it will be easier to for them to approach companies because they will be more sensitive to the reason why companies give. Sheldon (1991:230) suggests, the following are some of the possible reasons why companies give:

"* Good corporate citizenship. Many companies feel it is important to present a positive image in the communities in which they operate. They have a moral obligation or a responsibility towards the organization.

* Individual leadership. Gifts are given because of an active interest or involvement of those in charge.

* Location. Companies will restrict support to organizations in the communities in which they operate.

* It is socially acceptable to support organizations.

* There could be some income tax benefits for the corporation and lastly,

* What's in it for us? Some companies want to see some return on their charitable investment"

4.4.3 Types of corporate giving

There are different types of corporate giving, the most common being cash and gifts-in-kind.

* Cash gifts. These are cash grants to meet operating and programme costs. This is the kind of support most typically provided by companies.

* Gifts in-kind or non-cash gifts. Companies are more flexible and have more resources to offer organizations than individuals and trusts. Gifts-in-kind can include equipment, land, loan of executives who volunteer their expertise, providing the use of corporate facilities and supporting organization events.

Most corporate giving is usually a mixture of cash and non-cash gifts. If a

corporation is approached for the first time it is better to start with an in-kind gift which can lead to the building of a relationship and to major cash and non-cash gifts in the future (Rosso, 1991:233).

4.4.4 What corporations will not give to

Companies will not give to:

* Local appeals outside their area.
* Purely denominational appeals.
* Circular appeals and
* Overseas appeals (Clarke, 1992: 52).

4.4.5 Trends in corporate giving

Trends in corporate giving tend to change from time to time. At the moment the following trends are seen in corporate giving:

* Corporate giving correlates strongly with profits. Giving programmes will be adjusted to economic conditions: When profits increase so will contributions and *vice versa*.

* Many companies prefer to give smaller, one-time grants to more organizations. Grants are not automatically renewed each year without at least an updated letter of request.

* Companies are devoting more of their resources to addressing specific problems in the community rather than supporting an organization's operational budget.

* Finally, companies will provide support by way of a "matching grant" if the organization raises the equivalent amount from other sources.

4.5 TRUSTS

In the USA, in 1994, foundation grants accounted for 7,6% of total giving. (*Giving USA* 1995: 63,77). In South Africa, trusts gave only 0,4% of total donations received in 1992 DMI seminar: 1998). In Britain nearly £600 million (Clarke, 1993: 44) is given away annually by trusts. As a rule, trusts make larger donations and consequently have an impact on the organization in addressing its problems.

4.5.1 Types of trusts

It is good for the organization to understand the types of trusts that are available in South Africa before trying to solicit funds from a trust. Although the organization will probably only encounter one or two types of trusts in the search for funds, it is important to be aware of the variety of trusts available. Trusts include the following:

* Inter vivos trust: As these are registered they simultaneously become operative by a transfer of assets in the planner's lifetime by separate trust deed.

* Testamentary trust: These come into existence at the testator's death and are incorporated in the testament.

* Trust mortis causa: These come into existence by contract but are only effective and registered upon the planner's death.

Another method of distinguishing trusts is from the viewpoint of beneficiaries' rights to ownership of the trust assets. Three distinct categories can be identified:

* Bewind trust: This is where the real rights of ownership of the trust assets vest in the trust beneficiaries, but the management and control over these assets vest in the trustee.

* Vested trust: This is where ownership and control of the trust assets vest in the trustees and the beneficiaries have only personal rights to claim their portion of the trust benefits from the trustees.

* Discretionary trust: This type of trust is probably the trust which organizations will most often encounter. Here, ownership and control vest in the trustee in his representative capacity. However, the trust beneficiaries have no right whatsoever to claim the trust benefits, except and until the trustees have exercised their discretion and physically paid over a benefit to a trust beneficiary.

4.5.2 Where to find trusts

To find the right trust is probably as time consuming as finding the right company. Cuthbert (1995: 80) suggests the following sources:

"* List of South African foundations produced by the Institute for International Education,
* List of South African Trusts co-ordinated by Intertrust,
* Friends who are connected with the investment field,
* Attorneys and accountant firms".

4.5.3 Trust giving

Trusts are constrained by their founding trust deed, their requirement to support charitable work and by their constitution. Many trusts are vehicles for individuals. Here personal contact is very important if the organization is to stand a chance of receiving a grant. If a trust is a vehicle for company giving it's motivation for giving will be the same as that of the company.

Most trusts make cash donations, either one-off or for a number of years (usually for three years). The organization must therefore be clear about it's long-term goals and how the grant, if received will fit into this. All trusts are different. Some prefer to give start-up money, some give only to capital projects and others only provide support for these.

4.6 SYNOPSIS

This chapter starts by attempting to answer the question: Who are the constituents of the organization? This question must be answered before looking for sources of revenue. If this is not done the search field, in which possible donors will be found, will be so large sources will be limited.

As argued earlier, the Christian organization's constituency is already narrowed down to mostly Christians. It is a question of finding those Christians that will be willing to donate to the specific cause. After these constituencies have been recognized, sources of revenue can be identified within these constituencies. There are three major sources of revenue to be found: Individuals, corporations and trusts.

Of these three sources, individuals form the majority of donors, especially Christian organizations. By using a tool called the donor pyramid, the organization takes the individual from the point of being a "suspect" to that of a "prospect", a first-time donor, a renewed donor, a major donor, a capital donor and lastly a planned-gift donor. The chapter suggests where prospects can be found and includes groups such as current clients and the organization's own board members and trustees.

Corporates as a source are also discussed. Although very few companies directly support Christian mission organizations, those doing social work sometimes receive support. The chapter looks at ways to locate companies which might support the organization and then answers the questions: Why corporation give, how they give and what they will not give to. Trends in corporate giving are also examined.

The final source discussed is trusts. The different types of trusts: intervivos trusts, testamentary trusts, trusts mortis causa, bewind trusts, vested trusts and discretionary trusts are defined. The chapter then gives an indication of where to find trusts and then discusses on how trusts make donations.

Finally, it is emphasized that the organization should test its ability to attract funds from individuals, corporates and trusts. Only then can it decide which sources are the most cost-effective to spend time and money on and only then can the organization decide

which methods to use in soliciting funds.

5. METHODS OF FUNDRAISING: RELATIONSHIP FUNDRAISING, PERSONAL SUPPORT RAISING AND SPECIAL EVENTS.

5.1 INTRODUCTION

If the fundraiser does not know how to cultivate those sources discussed in Chapter 4, the organization will keep on struggling or even worse, it will not succeed. This is where many Christian organizations fail. They do not believe that methods used in business can also apply to Christian organizations. In fact many of them go so far as to say that these methods of fundraising are wrong and un-biblical (Christian fundraising seminar, Graham Wood, Relationship Fundraiser, 1998).

This chapter discusses two different methods that can be used successfully within Christian organizations, to solicit funds from individuals. On the other hand, the other method to be discussed is applicable to obtaining revenue from a variety of sources: Special events, where many different sources are utilized to make the event a success. These three methods are probably the methods most used in Christian organizations.

It is imperative that the organization realizes that the diversity of funding is the secret of financial stability. Organizations that depend on limited action in fundraising by confining their activities to a certain method such as special events, are building a weakness into their structure (Rosso, 1991: 293). If the method fails for some reason, the organization will be in financial difficulty.

To be successful the organization needs broad-based, diversified fundraising, in other words, it needs to utilize all possible methods available – keeping in mind its Christian roots.` Broad-based fundraising raises a lot of money to satisfy diverse programme support and the special-purpose, capital, and endowment needs of organizations (Rosso, 1991: 293).

5.2 INDIVIDUAL GIFTS

The first method to be discussed is soliciting funds from individuals. The process followed with the implementation of this method is the following (see figure 5.1):

1. Donor acquisition

2. Donor renewal

3. Major and capital gifts

4. Planned giving

Soliciting gifts from individuals is probably the most important method, especially for Christian organizations. Because individuals are the source that bring in the most donations for a Christian organization enough time must be spent on the process to make it a success.

The method to be discussed to raise funds from individuals is often referred to as the "Total Development Programme", or "Relationship Fundraising". The process is the same for both but the term "Relationship Fundraising" is used here.

5.2.1 Relationship Fundraising

The process consists (figure 5.1) of a programme for acquiring new donors and then building a relationship with them that will gradually move them from potential donors (all South African Christians), to an acquired new donor (first gift platform), to a renewed donor (a donor that gives a second time and then on a regular basis), to a major gift donor (a donor that is willing to give larger amounts for example equipment), to a capital gift donor (a donor who will support projects such as a building) and finally a planned gift donor (a donor that will leave a bequest).

It is usually visualized by means of a pyramid, where the organization starts at the bottom with new donors and then gradually works them up the pyramid to bequests. This process is used with success all over the world, including South Africa.
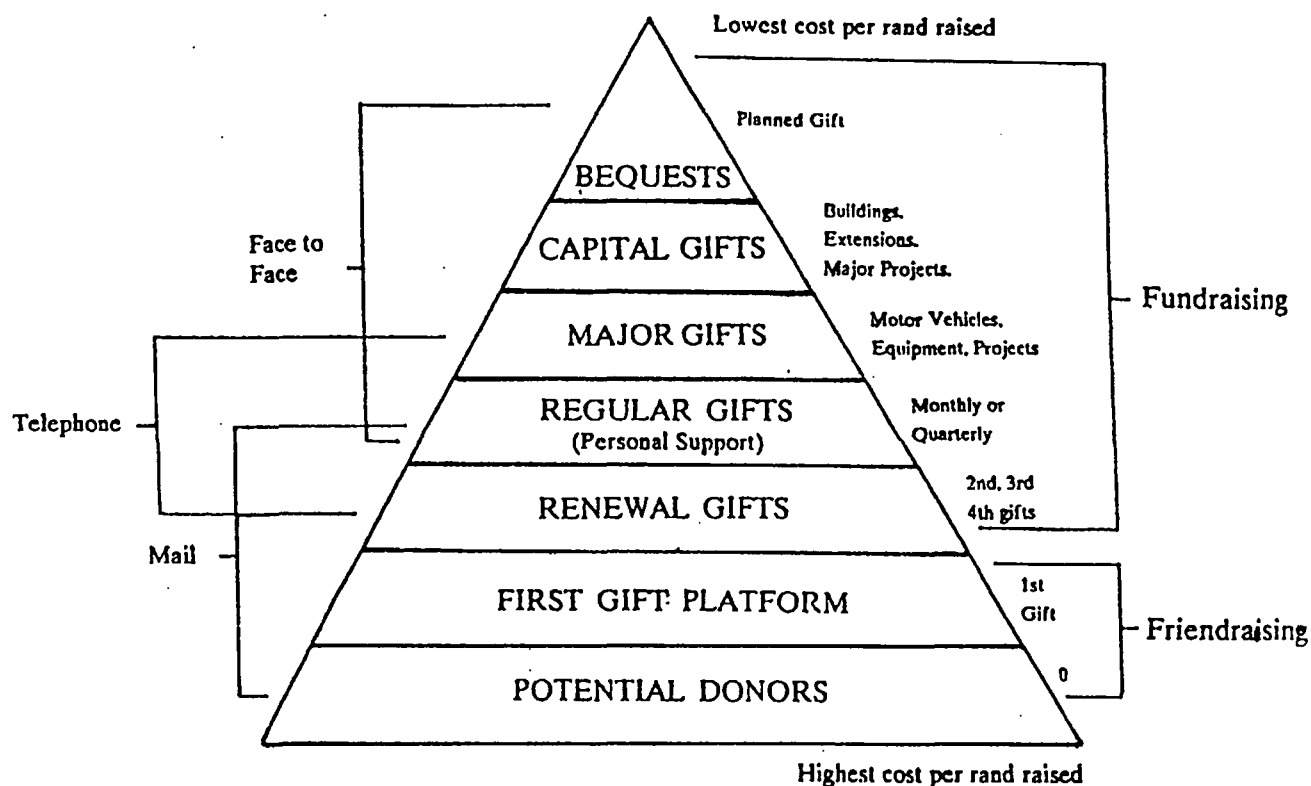
Figure 5.1.: The donor pyramid.

Source: Graham Wood - Relationship Fundraiser. Personal communication.

5.2.2 Implementing relationship fundraising

To start the fundraising process, a development council must be formed. This takes responsibility with the executives of the organization for the early planning functions. The development council together with the fundraiser draws up a fundraising plan, which places all activities together in a well co-ordinated marketing venture. This together with budgets is submitted to the board for approval (Downes, 1987:90). It is very important for the fundraiser as well as the staff to know what is planned, otherwise the participants tend to plod on without direction.

5.2.2.1 Donor acquisition

The first step in the process is donor acquisition. This is the process of identifying

and obtaining new donors and is where a suspect becomes a prospect and then a donor. The decision on how to carry out donor acquisition is very important. The Fundraising School Center of Philanthropy gives the following ladder of effectiveness:

(1). Personal: face-to-face
    a. Team of two
    b. One person
(2). Personal letter (on personal stationery)
    a. With telephone follow up
    b. Without telephone follow up
(3). Personal telephone
    a. With letter follow up
    b. Without letter follow up
(4). Personalized letter
(5). Impersonal letter (direct mail)
(6). Impersonal telephone (telemarketing)
(7). Fundraising benefit (special event)
(8). Door-to-door
(9). Media (advertising)

The best way to get a gift is to ask someone face-to-face. The first place to start is to ask the fundraiser, the board, staff, service clients, suppliers, volunteers and other key people to give. If the board, the fundraiser and the organization's staff are not willing to give to the organization, they cannot expect someone else to give. From there the circle can be widened.

In addition a one-to-one meeting, broadcast talks, making a presentation at public events or private meetings, personal visits and telephone calls fit into this process. All offer opportunities for persuasion. Many organizations have the opportunity to provide speakers for meetings and fundraising events. An experienced speaker can make use of the chance to raise funds as well. This is where the organization's case statement (case for support) can be used very effectively.
Face to face soliciting is daunting. Volunteers are needed for the footwork and

must be prepared for rejections. If it is a small organization or the organization has a small constituency, face to face donor acquisition is a possibility. Although this method of solicitation is usually used in the areas of major donations, capital donations and bequests some large organizations with large volunteer bodies employ this method with great success. An example is the Cancer Association's "Tok-Tokkie" campaign.

The organization will sooner or later have to deal in larger lists of names and the most cost-effective way to reach large numbers of people is through direct mail. Next to a personal visit or telephone call, direct mail is the most intimate of all media. "It is an 'I-to-you' communication, and its success rests on the bond that is established when one person communicates with another in personal conversational terms". (Craver, 1991:65).

Experts claim that mailing on average draws ten times as many responses as newspaper ads and one hundred times as many as television advertisements. (Flanagan, 1991:119). The organization should think of going into mail as going into business. Using direct mail must be a strategy for repeat mailing to a mass audience in order to find the minority who will support the cause. The organization should not consider direct mail unless it has the seed money to launch a programme. If the organization does not have the funds to begin the strategy, it will not have the funds to handle success.

The organization should also not be tempted by a consultant who offers to begin its direct mail campaign by taking a percentage of future profits. A consultant working on a percentage is going to look for "quick hits" and not loyal donors. If the organization does not have the money to start this programme, it should focus on low-overhead fundraising strategies, such as face-to-face solicitation. Then it can hire an experienced consultant who will work for a flat fee (or the organization can do it themselves) (Flanagan, 1991:120).

If the organization cannot afford a consultant or (wants to do it itself), it might make use of an organization such as SAIF (The Southern Africa Institute of Fundraisers) or talk to other fundraisers in the field. SAIF is an organization that

sets ethical standards for fundraisers(SAIF constitution). It is an organization where fundraisers meet and learn from each other, seminars are organized on fundraising and where experts give practical advice. There are branches in all the main centres of South Africa.

Direct mail acquisition programmes cost money. How much will depend on the package (all the components of a mailing), how good the list is (the more defined the list the more expensive), how persuasive the appeal is and the donations received. Depending on the response rate, a programme can begin to generate a profit in anything from six months to up to two or three years. Donor acquisition is friendraising not fundraising. It must be seen as an investment, and is done to obtain new donors not funds. The essence of, the broader the base of the pyramid the more donors there will be to be pushed up the pyramid.

Donor acquisition mailings in Australia and America do not seem to break even without a very well defined list of prospects. Results in Australia range from 0,5% to 4,0% (Downes, 1986: 92). In the USA the figure is about 1% (Flanagan 1991: 120). In Britain mailing response rates may rise to 4% or 5% in special situations, but 0,5% to 1,5% is the likely range (Clarke, 1993:76). In South Africa, on an average package, results range from 1,2% to about 2%. A very good package, however, can exceed 4% (The Small ask: DMI fundraising seminar: 1998).

In the USA it works this way: 92% of the people never open the envelope. In other words 8% of people open the envelope. Of these, half, 4%, read past the first paragraph. Of these, half, or 2%, read to the end of the letter. Of these, half, or 1% send money (Flanagan, 1991:121). These statistics would appear to be much the same the world over.

(a) How does the organization decide on the right list?

In order to obtain the answer to the above question, two additional questions need to be asked: Who should give and why should they give. The "who" might possibly include every person, especially every rich person or big company in the country but when the "why" is answered it narrows the possibilities down. Both questions

should always be asked.

The organization should then, if it has an existing list, analyze it. It should develop a profile of existing donors by looking at factors such as age, gender, language, hobbies, interests, area, income, payment, how much the donors give and their reasons for giving. This can be done by means of questionnaires, donor surveys or focus groups within the donor base. Common denominators should be identified and matched with available lists.

It is necessary to test several lists before committing large sums of money. This is quite an exact science. When testing, test one thing at a time. A minimum of 5000 names must be mailed to test a package and a list. In deciding on a list it is also important to know if the list has been updated, how old it is and if it has recently been used. The more recent the better. In doing so the nixe rate (undelivered mail returned to the organization by the Post Office) is kept to a minimum, and impacts favourably on the costs. It is common practice that nixe rates should not exceed 6%, at the most 7%.

Lists can be rented in different forms, for example labels or magnetic tape. Experience have shown that lists available in South Africa, are not as sophisticated as in the USA and Europe, but there are list brokers who are very professional and will do a lot to get the right list for the organization.

(b) The package

A package is defined as all the components in a mail appeal. In donor acquisition the package is vital if the mailing is to be successful. A package should consist of the following components:
* The outer envelope
* The letter
* The donation slip
* The return envelope, has the pre-printed address of the organization on it. The
    last two can be combined in a deep flap envelope, which gives information
        about the organization, is at the same time a donation coupon and has the

pre- printed address on it. In this case the donor only has to have the envelope to be reminded of the organization and its work.

Not too many inserts should be included in a donor acquisition mailing because too many will distract from the ask. The organization should continue using lists and letters that work.

(c) What works?

The following needs to be borne in mind when doing a donor acquisition mailing:

* To be effective the organization needs to have an issue that the readers feel strongly about (Flanagan, 1991:122). In Christian organizations most donors will be committed Christians and usually are committed to Christian ministry in various forms.

* Mail is emotional not mental. If a person does not get emotionally involved, that person will not support the organization.

* The organization should be honest and ethical in what is said in the letter. It should not describe events that have not happened.

* The letter should be no longer than it needs to be.

* If the organization can afford it, letters should be personalized. Otherwise they might start with something like "Dear Christian friend". The more personal the letter, the better the response. However, it must be remembered that the more personalized the package is the more expensive it is

* In approaching individuals, the organization should try to indicate clearly how much money is needed and how donations are a vital part of reaching the target.

* The need that is addressed should be expressed in human terms with graphic

images of the problem and how the organization solves it. Words such as "lonely", "hungry", "neglected" and "confused" are often used.

* The organization should target the appeal carefully, by making the message as personal and as relevant as possible.

* The principle is to get these elements right: the audience, the message and the timing.

* The organization should <u>ask</u>. In 1993, 84,1% of households surveyed in the USA were asked to contribute and 76,9% of those asked did so. In contrast, only 38,1% of remaining households, who were not asked, contributed anything (*Giving USA* 1995: 49).

(d) Thanking the new donor

Many organizations stop at this point. They have received the money and that is what they wanted. However, thanking a new donor and doing it promptly is very important. A personalized thank-you letter together with a receipt, a welcoming package and a return envelope should be mailed to the new donor within forty-eight hours. The longer the organization takes to thank the donor, the more the donor will feel that he or she is not important to the organization.

The welcoming package can include items such as the latest newsletter and annual reports. The idea is to give more information about the organization to the new donor. The return envelope is a "soft" ask, meaning that donors are given the opportunity to give a further gift should they desire to do so. It must be remembered that thanking a donor is the beginning of a new ask and not the end of the old.

5.2.2.2 Donor renewal

The next important step in relationship fundraising is to get the person to give

again. Donor renewal can be defined as repeat gifts received from donors. Once a donor has made a further gift it is very likely that a relationship will have been established and that the donor will make further gifts when asked. If a donor has given such a gift and it is not handled correctly the money spent on donor acquisition will have been wasted.

Donor renewal is usually carried out through newsletters and further appeal letters. Initial renewal results in Australia range from a 45-65% response (Downes, 1987:92). In America about 50-60% renew the first year, and 60-70% of donors renew the second year. By year five, 83-90% of donors renew and, by year eight, 87-91% renew (Flanagan, 1991:121).

Donor renewal gives the organization the opportunity to:

* Tell the donor more about the organization, what the organization does and how
   it is done
* Ask for a further gift
* Upgrade the donor. If a donor has given R25,00 the organization must try to
   upgrade that donor and ask for a somewhat larger gift. Upgrading must be
   carefully handled and should only be done a year after the first gift.

Donor renewal is concerned with enabling donors to give to the organization. Opportunities such as a Christmas or an Easter mailing or a newsletter or special mailing or when there is a genuine crisis within the organization are used for this purpose.

(a) Planning

If the organization is to be successful in this respect the fundraising executive should at the start of each year establish a detailed plan of action to mail on a regular basis to all donors. Planning for donor renewal must take into account that the new donor needs to be asked again within three months to renew his or her gift. The longer it takes the organization to ask, the more difficult it becomes to build a relationship and the greater the possibility of losing the new donor.

In planning for each year the organization must plan at least two to three asks and two newsletters. Depending on the organization and its donors, 4-6 mailings a year can be planned with ease. Some donors give each time they are asked; others give on a quarterly or an annual basis.

(b) The package

An appeal letter package usually consists of the following:

* An outer envelope: The envelope can either be a window envelope where the printed name and address of the donor can be seen through the window or an closed envelope with an address label attached to it.

* A letter: The letter is the main communication component, and should be interesting and personal.

* A donation slip: It is necessary to make it as easy as possible to send in the donation. If all the information is on the reply slip it can be returned with the donation without the donor having to write down any particulars. It should summarize what the appeal is, give examples of expected donation levels (this cuts out the debate on how much to give) and carry any donor identity codes needed to keep track of the response and the giving history.

* A reply envelope: Making it simple for the donor to reply will increase the response considerably. If a donor is willing to make a donation he or she will also be willing to put a stamp on the reply envelope. As with donor acquisition not too many inserts must be included to distract from the ask

When doing a newsletter mailshot the following inserts can be included:
* An outer envelope
* A newsletter
* A donation slip
* A return envelope.

A newsletter mailshot is usually a soft ask. The newsletter must be geared to the needs of the donors, and should ideally provide news of those who are being helped and are benefiting from the programmes. Including a donation slip and return envelope gives donors the opportunity to give again.

(c) Upgrading

Upgrading donors is necessary in order to push the donor up the donor pyramid. As stated earlier, upgrading should be handled with great care and only done a year after the first gift. Not all donors can be upgraded. Although some of them give as much as they can, most are willing to give more than their first gift. When upgrading, different options can be given to the donor such as debit orders or stop orders or even paying by credit card on a monthly basis. The better the relationship with the donor the better the chance of receiving a monthly donation or a bigger donation.

(d) Building relationships

Asking for a donation is all about building relationships. The organization should:
* Try to personalize all letters mailed to donors.
* Send donors written cards thanking them for special gifts or letters.
* Answer all letters received from donors promptly.
* Send donors birthday cards if it has the details.
* Phone donors who have made large donations. The larger the gift, the larger the thank you.
* Start a special gift club for large donors to make them feel special.
* Invite donors to visit the organization.
* Visit donors at their homes.
* Thank donors, if possible, within 48 hours, personalizing the letters, and using a different thank-you letter each time.
* Treat donors like close friends, and thereby retain their loyalty.

5.2.2.3 Major gifts and Capital gifts

On the higher stages of the donor pyramid the donor has usually been with the organization for a few years and the 80-20 principle starts to work. This means that 20% of the organization's donors will give 80% of donations received. Although some "asks" can be done by mail most major donations should be done face-to-face.

(a) Ask by mail

When asking for a major gift by mail the organization must analyze the donor file to identify the major donors who will be willing to give. For each organization "major" will have a different meaning. For some R150,00 will be a major gift while in other organizations R1000 will be major. These donors should be categorized in order of the gifts received. A special donor club - "golden club" or the "top twenty club" - can be started where these donors are given special recognition for their donations.

Donors, within this "club", are again categorized in order of gifts received. A special project that has been identified within the organization can be used as a project. A mailshot asking for a gift over and above normal donations is done. About 20% of the donors will respond to this. Depending on the level of the gift received the organization will give the donor a special gift - e.g. bookmarks, dairies or ties - to thank him/her for the donation (J. McLeod, personal communication, 28 May, 1996).

The methods used in doing a major ask will differ from organization to organization. The researcher, working within a Christian organization has found that some individual donors will give a donation without hesitation, but are usually not in favour of receiving a gift back. The reason most often given is that the donation is given to thank the Lord for what He has done for the donor. Stewardship consequently plays a very important role within Christian organizations and the organization should be sensitive to this.

(b) Asking face-to-face

When soliciting a major as well as a capital gift, asking face-to-face is the best approach. The following process can be used: identification, cultivation, solicitation, acknowledging.

* Identification: It must be determined who is considered a major donor. The LIA-principle discussed in chapter 4 is consequently applied. Donors need the linkage, the interest and the ability to give. Research is carried out concerning each prospect. This is where the history database of donors is useful. Segmenting the list according to size of gifts received enables the organization to determine who has the ability to give to a certain project. General information on donors determines interest and, if a donor has been giving to the organization, there is a link.

* Cultivation: The process usually involves everybody who can influence the decision to give. This includes the spouse, adult children, business partners, financial and legal advisors and others. Key volunteers can be used to meet with prospective donors in order to inform and stimulate, rather than to solicit donations.

* Solicitation: Success here, depends on the ability of the campaign director to recognize the moment when the donor is ready to commit. This is where the following must be considered: Who should ask Whom for What amount and When?

Who should ask whom: Volunteers are usually recruited to solicit a specific prospect. Usually a team consisting of two persons solicits the prospect. The results vary, and obviously depend on the relationship between the solicitor and the prospect.

What amount: Many volunteers feel uncomfortable discussing specific gift amounts. It must be remembered that no prospect is insulted when a gift amount

requested is too large. Campaigns which fail generally, do so because people are not asked to give not because they declined to give when asked.

When: The best time to solicit a gift is when the prospect is ready. The solicitor should look for signs such as the prospect starting to use words such as "our organization" or becomes a volunteer. Major gifts often require months, even years of cultivation and negotiation before they are closed.

5.2.2.4 Planned giving programme

The final step in relationship fundraising lies at the top of the pyramid. This is where donors are asked to consider leaving a bequest to the organization. Planned giving programmes provide a way for an organization to develop those financial resources needed to ensure its future. They also serve the organization's constituency by providing important benefits for personal and family planning. This method of fundraising (with its orientation to the larger gift) is part of the relationship programme of small and large organizations (Brain, 1991:96). The method is also the most cost effective and rewarding aspect of fundraising, especially as, with the population in the western world growing older the number of people in their late sixties and seventies will double within the next twenty years or (Downes, 1987:94).

Furthermore, research has shown that 80-90% of large gifts and bequests come from donors who have given the organization donations for the past three to five years (Flanagan, 1991:23).

In Britain 65% of people have not made out a will, of the 30% of the people who have a will only 9% have made some sort of charitable bequest (Clarke, 1993:94). In South Africa the statistics show that over 50% of people die without a will (McCleod, J, 1998:The Ultimate Ask). This gives fundraisers two targets: Those who do not have a will and those who have not seen the importance of testamentary giving. Before the organization embarks on a planned giving programme it needs to assess an organization's readiness to start such a

programme.

(a) Testing feasibility

Assessment should focus on the organization's donors and their giving history as well as the number of bequests received even though the organization does not have a planned giving programme. Other factors that should be of concern to the staff are the age of the organization, its history and its predictable future. The assessment report should include the following: specifications for staff and logistical requirements, policies and guidelines for managing the programme, budgets, goals and objectives, training recommendations, plans for identifying and cultivating prospects, marketing plans and plans for recognizing and thanking donors (Brain, 1991:103).

(b) The planned giving staff position

The next step in the process is the selection of the person responsible for the programme. Typical attributes for the selection of a planned giving person in a Christian context are:

* Good interpersonal skills. The person should be a good listener and be patient, observant, confident, empathetic (and have a sense of humour)

* The person should have good public relations and communication skills

* An apt student. The person should be capable of learning and coping with technical aspects that constantly changes

* Motivator. The person should be able to motivate volunteers as well as donors

* Experience in training others. The person should be able to train staff and volunteers assigned to the programme

* The person should come to terms with mortality. (Brain, 1991:105 and McLeod:

1996)

* Counselling experience.

* Christian commitment.

(c) The role of the volunteer

Volunteers play an important role in this programme, as they are the bridges between donor and organization. Volunteers thus establish and nature a relationship with the prospect and, at the appropriate time, bring the prospect and the liaison officer together. Consequently, volunteers need to acquire understanding of the benefits to both the donor and the organization, of the instrument - although it is not necessary for them to be experts on planned giving.

Volunteers also serve on the planned giving committee and, together with the liaison officer, ensure continuity and results. Guidelines for selecting members should point to individuals who are familiar with (and who are donors of) the organization. One or two professional advisers should also be included (Brain, 1991:106).

An advisory committee can also be used. This committee is usually composed of professionals who are familiar estate planning and have knowledge of the community and its potential for support. The purpose of such a committee is to advise the staff, the board and the planned giving committee about the technical facets of the plan relating to their field of expertise (Brain, 1991:107).

According to Brain (1991:99), there are four characteristics of a planned giving programme:
* In planned giving, the donor's interests must always come first. Providing for spouse and other heirs are the donor's first priorities.
* Planned giving programmes need patience and understanding because much of the current year's efforts reach a conclusion in succeeding years.
* For programmes to succeed the organization needs to educate its donors, and

repetition of information is necessary.

* Measuring the progress of the programme is difficult. In the initial years, accomplishment is measured in the number of calls made or the number of prospects identified. It is estimated that one person working a five-day week can visit up to 250 prospects in a year.

(d) Types of legacies

Clarke (1993:94) distinguishes among four main types of legacy. All are of value in different circumstances.

* Pecuniary legacy: This is a simple clause in a will where a gift of money is left to another individual or charity. This is easy to arrange, but has a major drawback in that, over time, inflation erodes the value of this legacy.

* Specific bequest: This is when donors give an object or specified item of property away in their wills. Such bequests are good in that they maintain a real value over time but if the item has been damaged or stolen the charity receives nothing.

* Residuary legacy: The alternative is to bequeath the residue of the estate after pecuniary legacies and specific bequests have been made. It is an ideal medium for charities and is on average ten times as valuable as specific bequests.

* Life interest: Where an elderly relative needs to be cared for, a life interest clause is often inserted. This is useful in seeing to the supporter's family while at the same time ensuring a valuable legacy to charity.

There are two further types of legacy not referred to by Clarke, namely :

* Insurance investments and insurance policies. The beneficiary referred in the policy should also be mentioned it in the will (if a dispute should arise the bequest will have precedence).

* Group insurance and pension bequests and annuities. These are also capable of being bequeathed although despite the wishes of the bequeather -the trustees of the funds and the registrar of pension funds have the discretion as to how the funds must be used. If there are (for instance) dependants, the trustees will give preference to them (J. Ackermann, personal communication, 19 April 1996).

(e) The process

The process to acquire bequests can be broadly divided into four steps:
(1) Prospect identification.
(2) Prospect involvement.
(3) Writing the will.
(4) Further involvement.

(1) Prospect identification

The main prospects are elderly women (65+) who have survived their husbands or perhaps never married. In Britain, as a general average, 60% of charitable legators are female and tend to have the title "Miss" (Clarke ,1993:95). They need, however to be committed donors and have the ability to make a bequest. Ways to prospect for older people include: Taking notice of the contents of donors letters, as old people tend to talk about grandchildren; taking notice of the handwriting on letters and cheques and donors giving large amounts, although the latter does not necessarily mean that the donor is old but rather that the donor has a larger disposable income.

(2) Prospect involvement

According to Downes (1987: 72) the person involved in the bequest programme should preferably be a woman of thirty-fifty years of age, although this is not a strict rule. Older ladies may more readily trust a woman than a man. The donor sees the person as a "daughter" and a close relationship can develop.

The involvement takes the form of continued interest in the donor. The donor is

called more frequently to talk and eventually to make a visit. Then an appointment can be made to visit the donor and ask if there is anything the donor needs, for example there may be shopping the donor needs.

It is very important that on the first visit the donor should be informed of the work the fundraiser is doing. It should be made clear that the fundraiser is hoping to have donors make bequests.

(3) Writing the will

In time the donor will tell the fundraiser, that they have written the organization into their will or for that matter that it is not possible. If the donor wants to write the organization into their will they sometimes will seek advice on what to say. The fundraiser must have information available to help the donor with this.

(4) Further involvement

The fourth step is to stay involved. The donor should not be dropped as soon as the organization is written into the will. The calls, visits, cards should continue for the rest of the donors life.

By offering love, care and attention, old people who have supported the organization for a long time will help even more (Downes, 1987:73).

5.3 PERSONAL SUPPORT RAISING

Personal support raising differs from other methods discussed in this chapter, in that it is a method used to do exactly what it says: Raise personal support. Individuals involved (for instance) in mission work are required to raise their own funds consisting of their "salary" and related ministry expenses. Many Christian organizations work on this basis and, when done properly, can work very well. On the other hand, if not done properly, it can cause stress, which in turn can have a negative effect on the ministry of that individual.

5.3.1 Developing a personal support strategy

Two principles are involved: Relationship building; and contacting people personally and practically. Many of the principles used in individual fundraising are also used here. The outline discussed is used in Dillon (1993) and Rust and McLeish (1984) and suggest the following strategy:

5.3.2.1 Case of support

In South Africa, organizations help individuals who start out in ministry to develop a case of support before starting. The following should be included in such a case of support:
* Who the person is
* How the person was converted
* Their call to the ministry
* Something about the organization they work for
* What their specific job is
* What funds are needed to do the job.

After the case for support has been written the person must start the process of support raising. First the pastor of the person's own home church is contacted.

5.3.2.2 Begin with the person's home church

This is not only a starting point to raise support from a person's home church, but also to share the burden of raising support as well as the vision. The following must be discussed at the meeting:
* How the person got involved in the work
* The person's financial needs
* How to make a formal request to the church
* Ways to present the work to the church
* Provision of additional contacts both inside and outside the church.

Because it is unlikely that the home church will take on the full responsibility of a person's support, the process of support raising must continue.

5.3.2.3 Determine who else to approach

The compilation of a prospect list is the first consideration. This is an ongoing process. A list might be compiled from the following groups:

* Churches
* Church contacts
* Relatives
* Neighbours
* School contacts
* Previous employment
* Professional and service contacts - for example the individual's personal dry
  cleaners and dentist
* Friends
* Contacts from the mission
* Friends from other missions
* Club and civic group contacts.

It is never wise to assume that any person cannot possibly help. Every possible prospect must be followed up as people need to make their own decisions.

5.3.2.4 Record and catalogue prospects

The next step is to catalogue all the prospects, prioritize them, and then identify the top ten contacts.

(a) Catalogue prospects

The following information on prospects should be entered in a computer database or cardindex: Full name and address, telephone numbers, occupation, donor status the potential giving level. The list can be further segmented by (for example) inserting divisions between Christians and non-

Christians, or between people living close by to people living far away.

(b) Prioritizing prospects

Prospects need to be prioritized in order of the estimated amount each person can give and be rated high, medium or low. After this information has been gathered a giving schedule is drawn up. The missionary's support goal should be determined by the organization at the time of acceptance. Using a giving schedule helps to determine how close the projection is to the support goal.

(c) Identify the top ten contacts

The 80/20 principle also applies in personal support raising. In the beginning a person should focus on the top 20 percent, which is arrived at by placing high priority prospects in order from one to ten. The list however, is subject to change as people stop giving and other prospects are added.

5.3.2.5 Mail the first prayer letter

Mailing the first letter is not a substitute for asking for support on a one-on-one basis. It is there to inform. It should contain an opening sentence that attracts attention, and an introduction to the missionary trying to raise the support. It should also convey the missionary's calling for the work, state the name of the organization and discuss its vision and outreach, inform readers that the missionary is responsible for raising support, and provide the means for the reader to respond to the person's financial needs.

The letter should be short and to the point. It should be typed with sufficient white spaces and margins. A post script and a hand-written note could be added and each letter should be hand signed. During the deputation process the person should send a prayer letter once a month to inform people about progress being made. These letters should be informational and not appeal letters.

5.3.2.6 Make appointments

The persons called first are those who are likely to be receptive. Callers must be:
* Sure it is the right person
* Sincere and enthusiastic
* Brief and concise
* Able to avoid phoning at inconvenient hours and not discuss everything over the
    telephone.

On where to meet the person should be flexible and be willing to work around the prospect schedule. A meeting should be about one to two hours long - in such a setting both can relax and take time to talk. With business people a meeting would probably not be longer than twenty minutes.

If the appointment is set for more than a week in advance or if it is a busy professional, a letter confirming the appointment should be mailed to the prospect.

5.3.2.7 Conduct the visit

Before discussing this specific method further it is necessary to mention that some organizations such as Scripture Union help their workers by trying to find a personal support co-ordinator to help with the "ask". It is very difficult for people to promote themselves. If the co-ordinator makes the appointment and introduces the worker to possible prospects it makes it so much easier to ask for support.

Conducting the visit is what it is all about. This is where personal relationships are built or broken down. It is time to actually meet the people and ask for support.

(a) Preparing for the visit

Most people are very nervous when conducting visits but this can be made easier if the person is well prepared. The following should be remembered:
* Appearance: The person should dress appropriately. Clothes should be clean

and neat and hair well cared for.

* Directions to appointments as well as phone numbers should be written down. Sufficient time to travel must be allowed.

* The goal of the meeting must be remembered - to ask for support.

* All information available on the prospect should be reviewed.

* A list of special needs to which prospects may give should be made.

 * Everything that will be needed should be packed.

 * The caller should be relaxed and positive - and should pray.

 * Opening lines should be practised.

 * The presentation should be planned in detail.

(b) The actual visit

The visit consists of six sections. The caller should:

* Bring the prospect up to date with his life
* Talk about how he/she was led into ministry
* Talk about the organization
* Share the vision
* Share the financial need
* Ask for specific help.

(c) Closing the visit

With business people the meeting should stay within the time agreed upon. If a prospect is not pressured for time, additional time can be spent in fellowship.

The caller should stay focused on the purpose of the meeting - which is to seek financial and prayer support. When closing the visit the caller should thank the prospect for the meeting and leave some literature.

(d) After the visit

The conversation should be recorded in detail as soon as possible. If this is not done information will be forgotten. Within twenty-four hours a letter of thanks must be written to thank the prospect and recite any commitment that was made.

5.3.2.8 Track support

To track prospect giving a roster should be used. It should have three categories: Pledged donor, special donor and undecided. In keeping track of giving it should immediately be seen if a donor is giving what was promised, if the donor stopped, increased or decreased giving or if the donor has given a special gift.

Depending on the action of the donor a response must be made. For example: If the donor stops giving, the donor should be called and asked why, if the donor gives more than promised the donor should be thanked promptly.

5.3.2.9 Say thank you

A donor should be thanked immediately and in writing. Every gift should be acknowledged - ideally within twenty-four hours and should contain the following: Acknowledge the amount, say thank you and state some results.

A donor should not only be thanked when giving a donation but everytime a donor does something special; for example the donor sends a birthday card or takes the person out to lunch. The more a donor is thanked and appreciated the more committed the donor should become.

5.3.2.10 Conduct a letter and phone strategy

Some donors can be scattered across the country and it is not possible to visit each one of them. If this is the case a strategy of combining letters and telephone

calls should be started.

On how to write a letter the following should be included: Acknowledge the person reading the letter, say something personal about the writer, how the writer will have an impact in the mission, appreciate the interest given by the reader, be specific about the needs of the writer, ask for specific amounts, express appreciation and close. A P.S. should also be included.

After the letters have been written the follow-up phone call must be made to get a commitment. These prospects must also be thanked.

It takes discipline to send letters systematically and then plan when these prospects should be phoned. If this is done it should be successful.

5.3.2.11 Expand contacts

Three methods can be used in expanding contacts:

(a) Ask donors for referrals

Committed donors would want to help by giving names of friends and relatives who would be interested in the ministry. After these names have been given they should be put in sequence of most receptive to the least receptive. Telephone numbers, addresses and other general information should be asked and written down.

(b) Expand contacts through a key person

The key person is usually a successful businessperson in a community other than the person's own community. This person is asked to act on behalf of the missionary to raise support. Because this person is in the business community it will be easier to secure appointments. Relaying on a local key person should also decrease costs of long distance support development.

(c) Expand contacts through home meetings

This is when a donor invites friends to his home or a club, have something to eat and gives the missionary time to present the ministry. This should be made as personal as possible, no more than twenty people. Those invited should be excited about and able to support the work.

5.3.2.12 Cultivate support

Cultivation involves a commitment to build relationships with the donors. Donors should be viewed as part of the team and because of that they would be interested in and entitled to information about the ministry.

The missionary should pray for donors, help with psychological needs, help with spiritual needs, communicate regularly, maintain a personal communication record of each donor, maintain a year-end investment record, develop a information file on all donors and maintain a family network (do not forget the children and other family members).

5.3.2.13 Resolicit for support

A person should always be raising support by resoliciting current donors and if possible, ask to upgrade pledges.

Non-donors should be asked again. Hopefully some of them will become special gift donors or pledged donors. Others may be deleted.

Special gift donors should be solicited for gifts three to four times a year and it should be tried and convert them to pledged donors.

Pledged donors should be challenged to upgrade their giving and this should ideally be done on a one-on-one basis. This group should also be contacted in special emergencies.

Finally it must be remembered that the ministry of deputation should be based upon and begin, as all other ministries, with prayer.

5.4 SPECIAL EVENTS

Special events are not just "business as usual." They can be real happenings and increase organizational visibility, broaden the financial base for the organization, heighten enthusiasm and build support. Special events also offer new opportunities in fundraising, providing new ways to approach potential donors. Organizations have different reasons for conducting special events: To have fun, to honour, to award, to thank, to entertain, to promote, to raise money and to promote giver lists. The primary purpose in spending time, money and energy is to promote good public relations for the organization and help volunteers to work together on a project. Modest funds can be raised if planning is done correctly and the event is a success.

5.4.1 Planning

The main objective in choosing an event is to have fun. If people do not have fun they will not return. Goals should be set for the entire year. Past experiences should be examined in terms of events were successful and which were not. The organization's short-term as well as long-range plans must also be considered. Only then can it be decided what the organization should do in the way of special events to help the organization achieve those goals.

5.4.2 Planning for a specific event

When planning for a specific event, goals have to be defined. What does the organization want to achieve? What volunteers and support staff are available? What funding is necessary? What is the budget? Who is going to underwrite the project? How much time is at hand to plan for the event?

5.4.2.1 Choose an event committee

The composition of this committee often determines whether or not the event is successful. A job description is consequently written for every member. The committee might, for example, consist of a chairperson and five or six additional members (depending on the size of the event) who will co-ordinate the volunteers, the programme, public relations, invitations or reservations, contracts and agreements, the catering if applicable, decorations and the printing and entertainment.

5.4.2.2 Prepare guest lists

This is a crucial task and the list has to be reviewed to ensure that there are no duplications or errors. If tickets are sold by (for instance) Computicket or a local business, special seats for guests should be extracted before the selling of tickets starts to avoid embarrassment.

5.4.2.3 Budget

An accurate budget should be presented to the committee for approval. It should be as close to the actual costs as possible.

5.4.2.4 Personal follow-up

Each member should be followed up to ensure that the task is done properly. The person responsible should be in touch with the chairperson on a daily or weekly basis, and should give constant support to the committee and let them do the work.

5.4.2.5 The event itself

During the week prior to the event all agreements must be followed up to confirm

times and all materials needed. If specific requirements are laid down by personalities that will be part of the event, they should be followed exactly. A time-line should be prepared for the event in order for everyone to be informed. Any staff needed must be arranged and given their specific job descriptions.

5.4.2.6 After the event

The day after the event, guests that booked tickets but did not attend should be called to request their cheque. Thank-you letters should go out to special guests who attended the event. Those who did not attend should receive a letter updating them on the success of the event and thanking them for their support. All expenses incurred for the event should be approved and paid promptly.

5.4.2.7 Final report and evaluation

The final report should be completed no later than one month after the event. By that time all the bills should be paid and receipts collected. The report should include a concise evaluation of the strengths and weaknesses of the event, a financial report, and recommendations as to how to improve the event in subsequent years.

5.4.2.8 How many times to repeat an event

If the event is a success, it will probably be tried again. If this is the case it is important to try new ideas to attract an audience.

5.4.2.9 Finally

Developing effective special events needs creativity and should be approached with energy and imagination. At the same time however, it will need a good dose of common sense.

5.5 SYNOPSIS

This Chapter attempts to answer, the theory behind the method, and the practical process underlying the method to solicit funds from individuals and a combination of different sources (special events).

The first method to be discussed is that used to solicit funds from individuals, namely Relationship Fundraising which takes the prospect from being a new donor, to a renewed donor, a major gift donor, a capital gift donor up to the top of the donor pyramid, which is a planned gift donor. Through this method the organization builds relationships with donors.

The next method discussed is personal support raising. This method is often used in missionary organizations where individuals are responsible for supporting themselves as well as some of their missionary activities. The process includes: Developing a case for support, where to start looking for prospects, recording and cataloguing prospects, the ask, the thanking and the cultivation of donors.

Finally, special events covers the spectrum of sources available to the organization and is intended to be fun happenings to create more visibility for the organization as well as to broaden the financial base.

The methods discussed can be used either for a specific source or a mixture of sources. It is for the organization to decide on methods and how they can be adapted to fit the organization and its specific needs

6. METHODS OF FUNDRAISING CONTINUED: CORPORATIONS, TRUSTS AND CAPTIAL FUNDRAISING

6.1 INTRODUCTION

This chapter is a continuance of chapter 5 and discusses the methods used to solicit funds from corporations and trusts and how to do capital fundraising. These methods discussed are technical and the organization may need professional help to make a success of it.

Corporate and trust fundraising are methods that are source-specific while a capital campaign solicits funds from a variety of sources. Capital fundraising is intensive and is designed to raise a specific amount in a specific period of time. All three methods are very precise in what is needed and how it can be achieved.

In all these methods the strategic plan and in particular the case statement of the organization is very important. Without those tools these methods can not be used with success.

6.2 CORPORATIONS

Sheldon (1991:235-239) identifies five steps that are essential in corporate fundraising: development of a case, conducting research, developing and implementing a cultivation programme, doing the solicitation and providing follow-up.

6.2.1 Case of support

A good case of support will include reason as to why a company should want to support a specific Christian organization, address the services provided by the organization (ex. Mission work in Cape Town harbour), show how these services benefit the community, and explain how a grant will sustain and enhance the services of the organization. In approaching companies, an additional factor to consider is the possible benefits to the company - what the organization will offer in

return for support (example: Christian workers tend to be more reliable than other workers).

6.2.2 Research

The purpose of research is to target those companies that can support the organization. Careful research will shorten the list of companies to approach, will save time and can take many forms, including personal visits, comparing notes with other fundraisers, reviewing annual reports, newspapers and magazines, and buying retail lists and databases. Sources (cf Chapter 4) should be researched thoroughly. In South Africa, lists of companies are available but tend not to be researched in detail. However, Downes Murray International, a fundraising consultancy, has started a service called "Fundsearch" consisting of 1363 companies who give regularly to organizations, it is updated regularly, segmented by giving and geographical sectors, and contains donor-giving history.

After a list of potential funders has been created, the next step is to develop an in-depth profile of each funder. The best way is to call the funder directly to verify contact names and contact persons. Where possible, personal visits are advisable. This is also an opportunity to obtain information on the company's giving programme, which generally does not appear in written materials.

6.2.3 Cultivation

The cultivation of companies may involve sending newsletters and annual reports to them. Each prospect should be called ahead of the time to determine the interests of the company. Other information such as reviews of the organization's programmes and services can also be done. Another technique is to involve the corporation's employees with the organization, for instance in a special event.

6.2.4 Solicitation

The ideal situation, a face-to-face appeal, is the most effective form of solicitation

but is usually the exception to the rule. The organization must rely on cultivation and the actual written proposal.

6.2.5 The proposal

The fundraising proposal communicates the needs of the organization to its potential supporters. Timing is crucial in preparing a proposal. Firstly, it can take up to a month to prepare a proposal. Secondly, there are the time requirements of the funders themselves. Thirdly, the question of the period for which the funds will be needed must also be answered. (Most grant bodies are not prepared to consider funding periods beyond three years, at least initially). Fourthly, there is the question of what happens afterwards. If the project is to continue, how will it be funded after the initial grant period?

(a) Writing the proposal

When writing the proposal the first thing to do is to find out whether there is an application form. For most sources the proposal must be written by the applying organization. When writing a proposal the following factors must be considered:

* Length: A substantial proposal can be long, but for less complicated projects, the length should be kept to a minimum. Normally, one-and-a-half to three pages are sufficient. Other detailed information can be appended if it will interest the donor.

* Needs and aims: This is the heart of the proposal, and the needs and aims should be described as well as how the organization is going to achieve them. It should also give an indication of how the expected outcome will be measured.

* Budget: As potential funders scrutinize the budget, it needs to be clear, complete and accurate. Donors will be interested in the major areas of expenditure and income, as well as the organization's latest audited accounts.

* About the organization: It is useful to include statutory information on a letterhead, including the organization's registration details and names of trustees and board

members.

* Application: This should be in the form of a letter on an official letterhead and should summarize matters in a concise and punchy style. It needs also to be free of jargon. (Clarke, 1993:161-166 and Edles P , 1993:165-174).

Cuthbert (1995:82-83) suggests a list of contents and an order of presentation:

* Proposal summary: The summary is a single-page summary of who the organization is, its track record and skills, the need and scope of the project and its cost. It is the top sheet of the typed proposal or is contained in the covering letter.

* Introduction: The introduction can be the summary of the case statement. This is where the organization tells more about itself, where it started and something of its history.

* Problem statement: The problem statement explains the needs the projects propose to address. Narrow the description down to problems that will be tackled over a specific period. It must be shown that the groundwork has been done.

* Programme objectives: All the objectives dealing with the problem must be stated, and need to be specific with timeframes attached.

* Methods: Ways of achieving these objectives must be given.

* Evaluation: The prospect must be assured that there is a monitoring and evaluation process built into the programme.

* Future funding: If a project is to continue over a period of time the donor needs to be assured that, after the funding is over, the project will be sustainable.

* Budget: The budget should reflect the expected expenditure as well as the expected income. It must show that the organization is accountable and the latest

audited statements should also be included.

* Reporting and monitoring: The organization must find out what the donor will need in accountability and build it in the proposal.

Clarke (1993:164) summarizes the writing of a proposal by giving sixteen do's and don'ts. He suggests that organizations do –

1. Address the appeal to the right person
2. Tailor the appeal to the recipient
3. Include a clear statement of the organization's objectives
4. State clearly the purpose for which the funds are needed
5. Break a large appeal down into manageable and realistic amounts
6. Include the latest set of accounts
7. Offer to go and see the prospective donor and follow up
   the letter within a week
8. Make full use of VIP contacts
9. Keep it brief.

And he advises organizations not to -

1. Write to the company chair if there is a designated person responsible for donations
2. Make the appeal letter look mass-produced
3. Include irrelevant information
4. Dispute refusal
5. Be put off by a refusal
6. Feel obliged to offer expensive hospitality to a prospective donor
7. Make the appeal late in the company year.

6.2.6 Follow-up

The outcome of a request will trigger one of two responses. Either support will be

granted at some level or it will be declined, at least at the present. Whatever the outcome, the company must be thanked for its time in reviewing the proposal. If the grant is turned down, it is appropriate to ask how the decision was reached and if a modified request can be submitted.

Follow-up will also include a self-assessment component. Such questions as to whether the quality and timing of the solicitation were appropriate will be addressed.

6.2.7 Post-grant reporting

It is important to keep the company informed about the progress of the services or project the company is supporting. This will take place on a quarterly, semi-annual or annual basis depending on what is required (Sheldon, 1991: 240-241).

6.3 TRUSTS

Sheldon (1991: 243-252) states that the approach to trusts is similar to that of corporations and consists of the following: Research, proposal, follow-up reports and thanking.

6.3.1 Research

The most important part to understand and interpret the guidelines as well as other information of trusts. The ability to answer the following questions positively increases the chances of success:

* Does the trust support similar causes?
* Does the trust clearly state that it supports the type of project for which the organization is seeking funds?
* Does the trust make grants in the same area in which the organization is located?
* Does the trust make grants in the same monetary range that the organization is proposing?

The organization must also keep in mind application deadlines and other guidelines. Once a list has been compiled, it must pruned by requesting application guidelines, annual reports and application forms if applicable. The response will either indicate that the project is not of interest to the trust or that the organization must submit a full proposal.

6.3.2 The proposal

Trust proposals tend to follow the same general format and outline as those for corporations and should include an opening statement that summarizes the project, the amount requested, a short history of the organization, identification of the problem, how the grant will alleviate the problem, how the organization will evaluate the success or failure of the project, and a comprehensive project budget.

Many trusts have guidelines and application forms to help the organization with the proposal. Most proposals must reach the trust before a specific deadline. The proposal is then reviewed and the answer is mailed to the organization. As with corporations, the organization must be patient as the process often takes some time.

6.3.3 Follow-up reports

If the organization receives a grant, trusts often require regular follow-up reports. How and when this should take place will depend on the trust. This also helps the organization to monitor the project.

6.3.4 Thanking

Whether the proposal is funded or not, the trust must be thanked for its time and interest. Clarke (1993:43) summarizes the do's and don'ts in applying to trusts, advising organizations to - :
* Plan a strategy
* Plan ahead

* Select a good project

* Believe in what the organization is doing

* Select a target

* Write an application tailored to the needs of the trust

* Use a personal contact if at all possible

* Prepare a realistic and accurate budget

* Be concise

* Be specific

* Establish credibility

* Keep records of everything that is done

* Send reports and keep trusts informed

* Try to develop a long term relationship

* Say thank you.

He also cautions organizations not to:

* Send duplicated mailshots

* Ask for unrealistic amounts

* Assume that the trust will instantly understand the needs of the organization

* Make general appeals for running costs

* Use jargon

* Beg.

6.4 CAPITAL FUNDING

Most of the information used in this section of the thesis is adapted from Dove (1988) unless otherwise stated. Capital fundraising is a method of raising funds other than by normal methods and is referred to as "capital campaigning".

6.4.1 What is a capital campaign and why do it?

A capital campaign can be defined as a fundraising campaign, (extending over a period of months or even years) to raise funds for major projects requiring

extensive outlays of capital. The function of a capital campaign is to raise a specific sum of money within a defined time period to meet the asset building needs of the organization. Examples of these include the construction of a new building, renovation of existing buildings and the purchase of technical equipment (Rosso, 1991:80).

6.4.2 Characteristics of a capital campaign

The following are characteristics of a capital campaign:

* Its strategy requires the solicitation of gifts that are much larger than those sought during a direct mail programme

* Gifts can be made in cash, as a pledged amount over a period of time or through the transfer of property

* Strategically important volunteers are capable and willing to commit their gifts and provide access to or solicit from other potential donors are used

* Discipline is paramount (Rosso, 1991:81).

6.4.3 Seven prerequisites to success

In order to be successful, a capital campaign depends on the following prerequisites:

* The campaign must have the support of, and time commitment from all key groups - from the board of trustees to the donors

* The organization must know itself and have a strategic plan for its growth and improvement

* Objectives must be based on legitimate plans, goals, budgets and needs

* A compelling case for support (case statement), is always presented in a written document

* A feasibility study addressing internal and external preparedness is included

* Leadership is enlisted (and educated)

* Major donors are ready and able to give substantial lead gifts.

6.4.4 The feasibility study

It is desirable for the organization to carry out strategic planning before it embarks on a capital campaign. A lot of the information gathered in this planning process will be used in the capital campaign and thus the necessity of a feasibility study. The major purpose of a feasibility study is to:

* Provide an accurate assessment of the factors that might affect the campaign

* Evaluate the external opportunity for the organization to conduct a major gift campaign successfully

* Determine, on the basis of reactions to the case statement, attitudes toward the organization's priorities and the campaign goal and, if warranted, to suggest changes

* Educate potential major donors and campaign leadership

* Identify and evaluate those best suited to give leadership to workers and major donors to the campaign

* Provide an analysis of all information gathered.

In simple terms, it is a thorough examination of the organization's readiness to ask and the community's preparedness and willingness to give.

(a) How is it done?

A study is conducted through personal interviews with a carefully selected cross - section of trustees, community leaders, service users, friends and other key constituents. All interviews are in-depth, generally lasting about an hour. The information gathered is kept confidential. In addition to this, focus groups, telephone interviews, and direct-mail questionnaires are used to supplement and further validate the study, which will seek information about the eight most important components of a campaign; namely the case statement, the needs, the goal, the prospects, the leadership potential, the timing of the campaign, the public relations requirements and the budget.

6.4.5 Leadership and campaign management

The leadership team is second only to the appeal or case in its importance in capital fundraising. Top leadership should consist of respected individuals who have an immediate name recognition with the organization's publics, who are strongly identified with the organization, who have given major donations to the organization and who will be dynamic leaders.

An organizational chart and job description should for leadership clearly describe specific responsibilities and the amount of time that will be required, including the number of meetings necessary to complete the task.

(a) The campaign chair and the steering committee

The person chosen to chair the campaign must be a person of proven capabilities, and one who has affluence and influence - and the willingness to use them on behalf of the organization. The chairperson of the volunteer campaign committee

will compile a list of possible candidates to form the steering committee. They will be interviewed individually to establish their possible interest as well as their ability to give a major gift.   Out of this steering committee, two sub-committees are formed. One is responsible for making a list of potential donors while the other is responsible for the development of the case statement (J. McLeod, personal communication, May, 1996).

6.4.6 Case statement

Although an organization should already have a case statement, one has to be written specifically for a campaign. The case statement is an internal document and needs to be fairly comprehensive.

The end product will be used to train and brief volunteers, staff-members and leadership. It will rally present leadership around the policy, planning, and sales story. It is a vital tool in campaigning for leadership. An abbreviated form of the statement should be used in testing the market (feasibility study). It will give the creative people a basis to work from, make videos, design the case brochure which will be used when the asking is done, design other brochures which will be used during the campaign and write proposals for asking corporates (J. McLeod, personal communication, May, 1996 and Dove, 1988: 63).

(a) Organization of the case statement

Certain elements should be included in every good case statement. It should:

* Contain a view of the organization and a brief history

* Describe the organization's mission in terms of human and social issues

* State the organization's objectives in specific, quantifiable terms

 * Describe a set of strategies for reaching the objectives within a given period of

time

* Report on the facilities, staff designations and budget requirements

* Identify those who will benefit from the service offered

* Put forward reasons why anyone should make a contribution

* Stress the strengths of the organization

* Include information relative to the environment in which the organization functions

* Include the organization's plans

* Describe its future capabilities

* List current and anticipated long-range needs

* Include a listing of personnel, including *curricula vitae* of key staff and governing
  board members

* Include an analysis of recent gift history, the financial history of the organization
  as well as recent financial statements and audits.

6.4.7 Listing potential donors

The organization will have a list of potential donors with which to begin. The
committee, using affluence and influence, now expands the list.   A gift table
showing the various levels of gifts required to meet the target is then drawn up. It
indicates the number and size of the gifts that will be needed if the organization is
to reach its goal. Mathematical assumptions are followed in arranging a gift table.
In South Africa it works like this: In a capital campaign, the top gift must equal no
less that 10% of the total. The top 40% of the money must come from about 10

donors. These gifts are called leadership gifts. The next 40% (special gifts) should be made up of 30-50 gifts. The last 20% will be general gifts from the public (J. Mcleod, personal communication, May, 1996).

It is also a rule of thumb that the organization must have at least four legitimate gift prospects for each major gift required, three prospects for each special gift and two for each general gift. If this is not achieved the effort has little chance for success.

A GENERAL TABLE OF GIFTS

ORGANISATION A.B.C.

TABLE OF GIFTS REQUIRED

BASE: R5 000 000 APPEAL

Annual Amount R	Amount over 5 years R	No. of gifts	Cumulative Total R
100 000	500 000	1	500 000
75 000	375 000	1	875 000
50 000	250 000	2	1 375 000
40 000	200 000	2	1 775 000
25 500	125 000	4	2 275 000
20 000	100 000	5	1 775 000
15 000	75 000	7	3 300 000
10 000	50 000	10	3 800 000
5 000	25 000	12	4 100 000
3 000	15 000	15	4 325 000
2 000	10 000	20	4 525 000
800 or less	4 000 or less	250	5 000 000

Figure 6.1: An example of a gift table.

Source Downes Murray International, 1998

It must be remembered that the notion that a campaign can succeed if everyone in the constituency gives the same amount is a fallacy. Wealth is not distributed evenly in society.

The work of the two committees should be concluded within two to three months. When the work of the steering committee is completed, the chairman visits

members to thank them and ask them to contribute towards the campaign. In successful campaigns, the contributions from board members can range from 20 percent to more than 50 percent of the total goal (J. McLeod. personal communication, May 1996 and Dove 1988:35).

6.4.8 Campaign phase

This is the phase where potential donors are informed and asked. Cocktail parties (functions) are held to inform donors about the campaign. The functions will start with the top potential donors and work their way down. To be effective, fundraising must be "top down" and "inside out".

The "top down" part of the equation pertains to a strategy known as sequential solicitation. The sequence starts with the largest gift that is required. This is essential because this gift will set the pattern for the remainder of the gifts to be solicited. If the top gift is at the level required then all other gifts will relate to it. This is the external phase of the campaign. "Inside out" means fundraising should start with the "family" of the organization. This is the internal phase of the campaign.

At the functions, donors are given a campaign brochure that has all the relevant information on the campaign. Nobody is asked, but all are informed about the campaign and told that someone will call on the donor to discuss involvement. Asking for the large donations takes place face-to-face and peer-to-peer. This process will take about two to three months, and depends on the team and how large the campaign is. In large scale processes regional committees do the asking and central committees undertake the planning. The askers are monitored and report back on a weekly basis.

All donors must be thanked. It is important that the right people thank those who have given. These donors must be kept informed about the campaign. If they are looked after they might make even greater major gifts in the future (J. McLeod, personal communication, May 1996; Rosso: 1991:92; and Dove ,1988:120).

If there are too many donors who have to be asked for small gifts, an appeal letter must be written and signed by the chairman who states that they will receive a call in which they will be asked to contribute to the campaign. These callers will have to be trained.

6.4.9 Campaign reports

All campaigns must have a cut-off date. At the conclusion of the campaign two types of final reports should be prepared. The first is an internal report summarizing the major accomplishments achieved and problems encountered. It includes recommendations, reports on prospects who have not yet committed themselves or who can still be solicited, reports on the volunteers, gives a statistical review of the campaign, and contains a scrapbook that serves as a visual record of the campaign.

The second report is a public document, which includes a list of all donors, gives recognition to key volunteers and workers, and provides sufficient financial detail to satisfy donors and volunteers that their work was worthwhile.

6.5 SYNOPSIS

This chapter continues the discussion on methods of fundraising and includes soliciting funds from corporates, trusts and lastly capital fundraising.

The first method discussed is used to solicit funds from corporates. This method is more "formal" passing through the following steps: Development of a case statement, conducting research to target specific companies, developing and implementing a cultivation programme, doing the actual soliciting and finally providing follow-up.

Trust funding follows much the same process used in approaching corporates. The method includes research, the proposal to the trust, the follow-up reports and the thanking.

Capital funding on the other hand is a specialized method specifically used to raise capital for large projects such as buildings. The process includes: A feasibility study, selecting leadership for the campaign, a case statement, listing potential donors, the campaign phase and finally the winding down of the campaign and the campaign reports.

It is important to remember that these methods are sophisticated and needs a high standard of professionalism.

7. CREATIVE WRITING

7.1 INTRODUCTION

The *Collins Cobuild English Language Dictionary* (1987: 331) describes <u>creative</u> as: "The use of something in a new and imaginative way to produce interesting and unusual results". The *Collins dictionary and Thesaurus* (1987: 229) defines the word as: "characterized by originality of thought" and "having or showing imagination". Accordingly, and in terms of these definitions, creative writing might be classified as: The use of the written word (including pictures) on paper, in a new and imaginative way to produce interesting and unusual results.

Creative writing is a seminal aspect of fundraising, as it is needed in nearly every aspect. Without creative writing skills the organization is unable to communicate effectively, and this has an inevitable impact on success rations. While it is conceded that not every fundraiser is a good copywriter, it remains necessary for fundraisers to involve themselves actively in the writing process. Employing people to write copy when they do not know the organization and are not emotionally involved leads to copy that does not reflect the organization adequately.

This Chapter focuses on the writing of a fundraising package to acquire new donors as well as writing intended for existing donors. Although the same concepts are used in both acquisition mailings and renewal mailings, the contents differ slightly because different audiences are addressed.

Warwick (1994: 70,71) states that "An effective fundraising letter possesses three attributes: It is an appeal from one person to another, it describes an opportunity to help and it invites the recipient to take specific action." If one of these elements is missing the chances are good that the package will not be as successful as it should or, even worse, it might fail completely.

This Chapter is divided in two sections. The first examines the theory of writing a package and then looking at examples of actual packages.

7.2 THE THEORY

Without fundamental "rules" it is difficult to differentiate between a good package and a bad package.

7.2.1 The first twenty seconds of a package

Professor Siegfried Vogele (quoted in Warwick, 1994:52) used advanced eye-camera equipment to trace the eye movements of people opening and reading direct mail. His research reveals the first twenty seconds of a letter's life are the most crucial:

* In the first phase - before the envelope is opened - eight seconds go by on average. In this eight second period the recipient turns over the envelope, notes to whom it is addressed, reads the return address at the back and any other text, looks for a way to open it and finally tears it open. On average, more time is spent on the back of the envelope than the front.

* In the second phase, lasting about four seconds, the reader picks up and examines the contents of the package. Before the reader reads a single word, the material in the reader's hand thus has an immediate impact- it either says "read me" or "throw me away".

* The third phase - occupying another eight seconds – is the first run through. The reader examines pictures and headlines, finding answers to some questions such as who is writing the letter and what the writer wants from the reader.

The writer's objective is to persuade the reader to read some of the text in the letter and not only headings. This means that the writer must get the reader's attention before the twenty seconds are up. If there is nothing of value for the reader in that first twenty seconds the reader will not continue reading.

```
┌─────────────────────────────┐
│          STEP 1             │
│                             │
│     MARKETING CONCEPT       │
│                             │
│   Includes facts, information, │
│   Feelings and circumstances │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 2             │
│                             │
│    CONTENTS OF PACKAGE      │
│                             │
│   The kind of letter, envelope │
│       and reply velope.     │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 3             │
│                             │
│        REPLY DEVICE         │
│                             │
│  Forces writer into detail. Ex. │
│    Different asking levels. │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 4             │
│                             │
│       OUTER ENVELOPE        │
│                             │
│  Very important because it is │
│   the first thing reader sees. │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 5             │
│                             │
│         THE LEAD            │
│                             │
│  The third highest readership │
│       of the package.       │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 6             │
│                             │
│      THE POST SCRIPT        │
│                             │
│   The real lead 90% of the  │
│           time.             │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 7             │
│                             │
│        UNDERLINING          │
│                             │
│   Underlined areas should   │
│   appeal directly to reader. │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│          STEP 8             │
│                             │
│         THE TEXT            │
│                             │
│   What readers will gain if │
│    they send a donation     │
└─────────────────────────────┘
```

Figure 7.1: Eight steps towards successful fundraising letters.

Adapted from Warwick (1994: 112-116)

7.2.2 Eight steps toward successful fundraising letters

Warwick (1994: 112-116) identifies eight steps in the letter writing process: The marketing concept, the contents of the package, the reply device, the outer envelope, the lead, the post script, subheads and underlining, and the text. (See figure 7.1) Although not intended as a formula, these eight steps better the chances of success in terms of Vogele's findings.

Step 1: Marketing concept

Writing a package starts with a marketing concept, which is the foundation on which the appeal is constructed. It is, as it were, the blue print of the package and keeps the writer focused. The concept contains all the information that is needed to write the letter including the facts, information, feelings and circumstances.

Step 2: Contents of the package

In deciding on the contents of the package questions such as the following should be answered: What kind of letter is going to be written? Is it going to be a long letter or a short one? Is a window envelope or a closed face envelope to be used? What is the appearance of the reply envelope and reply device going to be? This step determines how the marketing concept will be implemented as a package.

Step 3: Reply device

A reply device is one that accompanies the donation back to the organization in the reply envelope. Drafting the reply device at this stage forces the writer to flesh out the marketing concept. For instance, by deciding what the different asking levels will be helps determine what is to be written in the letter.

Step 4: Outer envelope

The outer envelope has a large role in the package as it is the first thing the reader sees. Consequently, sufficient time must be spent on this aspect. Questions such as the following should be answered: Is a window or closed envelope going to be

used? What colour and size should it be? Is there going to be a teaser on it? (A teaser is a sentence or picture that tries to force the reader to open the package.)

Step 5: The lead

According to research (quoted in Warwick, 1994: 115) the lead of the letter has higher readership than any other element but two (the outer envelope copy and the post script).

While writing the lead it might be convenient for the writer to also write the close. The close of the letter should be linked to the lead, while the lead should always be linked to the teaser on the outer envelope, if there is one.

Step 6: The post script

Vogele found that the post script is the real lead more than 90 percent of the time and deserves attention, as the post script emphasises and repeats what is important in the letter.

Step 7: Underlining

The items to underline are not necessarily those that break up the text at the most convenient intervals or help convey tone of voice. Words or sentences that are underlined should rather appeal directly to the reader. Underlining must also be used sparingly, and only a few words and phrases should be chosen.

Step 8: The text

The story (that is, the text) shows what readers will gain if they send a donation.

7.2.3 The sequence of a good letter

The sequence of a good letter is based on the "AIDA" principle:

- Attention

- Interest

- Desire

- Action. (See figure 7.2. This letter is also discussed in detail later in the chapter)

1. Attention: First the letter must attract attention. The opening (first paragraph)
   must:

* Get the reader emotionally involved immediately. The goal of the lead is
   consequently to persuade the reader to read the second paragraph and then the
   next one
* Be informal
* Be written to an individual.

2. Interest and desire: In sustaining interest and desire, the letter should:

* Build a desire to help
* Tell a good story
* Make the needs of the organization real
* Be believable
* Be written in clear simple sentences
* Consist of short and direct words
* Get right to the main point
* Make the reader feel needed.

3. Action: Finally it must call for action. The letter must:

* Ask for a donation
* Must be specific how gifts will be used
* Must be realistic about the size of the gift

* Must give direction on how to send their gift.

Dear friend,

I first met Ramon on the quayside at Cape Town harbour. 〔1〕

He was a Filipino, a crew member of a cargo ship that had just docked. He stood there in T-shirt and jeans in the South East wind, and spoke to me in his broken English.

1

I discovered that he was a Christian… but he had never possessed a Bible of his own! Fortunately, I had a copy of the Bible in Tagalog in my kit bag.

Ramon took the Bible in his hardened seaman's hands and clutched it against his cheek. The joy in his eyes turned to sadness as he told me of his 11-year old daughter Rosarita, who was critically ill with leukaemia.

I took another Bible from my bag. " This is for Rosarita", I said. "Come let's pray for her." 〔2〕

Last year alone, we spoke to 40 000 seamen like Ramon. What a privilege it is for us to be there…to offer our caring and our support. But particularly, to offer each a most precious gift – a Bible in his own language.

But we can only do this if others care…if you care.

Because it takes money it have Bibles printed in 62 different languages, ready to give away to seamen seeking comfort of God's Holy Word.

Please will you partner us in this important work for God? Just a small gift covers the cost of a Bible for Ramon and his daughter. If you can possibly send more, it would me such a blessing. 〔3〕

Thank you and God bless,

Figure 7.2 The sequence of a good letter.

Source: Christian Seaman's Organisation (1996)

7.2.4 Writing for results

To be successful in writing fundraising packages (in other words, to get results) there are crucial elements that need to be borne in mind. The first has to do with language. It is about what is said and includes everyday language, clichés, figures of speech, humour and irony (Warwich, 1994:26).

* Everyday language: The letter and package should be written in everyday language and patterns of speech; that is, to "write as you speak". When the letter has been finished (as a first draft), it should be read out aloud. If the writer stumbles over words and phrases it is in need of emendation, as it is likely that the reader will have the same problem. Instead of using, for example, "communication" use the word "write" - instead of "in the event that" use "if".

* Clichés: Most people think, speak and write in clichés. Clichés can offer easy ways to communicate thoughts rapidly but should not be overused. Think of examples such as "a pot of gold at the end of the rainbow", "like ripples in a pond" or "it rained cats and dogs".

* Figures of speech: Metaphors (e.g. "glaring error") and similes (e.g. "brave as a lion") should be avoided. They have the effect of slowing the reader down and might even prevent the reader from carrying on. If they are used they must be easily recognised and easily understood.

* Humour and irony: Humour is not advisable in writing for results because the written word is not a good medium to convey humour.

The second category involves sentence construction, punctuation, contractions, repetition, underlining and italics, typesetting, upper and lower casing and justification, formatting the letter for easy reading and the Johnson box (Warwick, 1994: 27-42). It looks at: How it is said.

* Sentence construction: The writer may break many of the rules on sentence

construction, punctuation and grammar. For example one may, for effect, start a sentence with "and" and "but".

* Punctuation: The writer should try not use semicolons(;) because the reader does not read long sentences. Periods provide rest and the capital letters that begin new sentences heighten interest. Dashes - and ellipses ("..") both help suggest urgency.

* Contractions: The eye quickly comprehends the meaning of contractions such as "don't" and "can't", and these also save space.

* Repetition: Repetition is not accidental. The writer is likely to emphasize important points by repeating them, for example the fact that the reader's donation can make a difference.

* Underlining and italics: Emphasizing important facts makes it easier for the reader to grasp the writer's meaning. When using typewriter-style, underlining is preferred to of *italics* or **boldface**. Underlining needs to be used sparingly to avoid confusing the reader.

* Typesetting: When typesetting a letter use a typewriter face. If possible stick to Courier 12 point. If the type used is wrong or too small, older donors will have difficulty in reading the text. Use a serif typeface rather than a san serif typeface and do not mix typefaces to avoid untidiness and difficulty in reading.

* Upper and lower casing and justification: Use upper and lower casing in headlines and in text because it is easier to read than UPPER CASING. Only justify text on the left-hand side as full justification (left and right) looks unnatural. Justifying only the left hand side of the text also creates white space (space with nothing in it) around the letter.

• Format the letter for easy reading: Leave enough white space around and in the letter. This makes for easier reading. To help create white space, the first sentence of every paragraph can be indented. Long paragraphs should be

avoided.

* Johnson box: If a Johnson box - boxed copy above the salutation - is chosen, a larger typeface may be used, as well as boldfacing and even colour to make it stand out from the copy. A Johnson box can be used when the reader's address is not printed on the letter. Accordingly, it replaces the address and is always placed in the left-hand corner above the salutation.

* Write a package; not a letter: The letter is the most important part of the package, but is however also only part of a package.

* The letter should be as long as is necessary to tell the story effectively. The letter should be just long enough to get the desired reaction from the reader.

The third category is about the donor: How the donor is handled in the letter.

* The word "you" should be used in preference to "I". Do not use "we" and use only a one-letter signer in order to create the effect of one person writing to another

* Appeal on the basis of benefits, not needs: Donors give money because they get something in return (if only "feeling good"). The writer should describe what the reader will receive in return for the donation - for example: "Your donation of R30,00 will give a Bible to a seaman in his own language".

* Ask for money not support: Asking for financial support is the reason why a fundraising letter is written. If the reader is not asked directly, he or she give will most likely not give. The ask should be repeated in the letter as well as on the reply envelope.

* The reader should be given a reason to give now: The writer must create a sense of urgency. A genuine reason should be found why gifts are needed immediately.

If these elements are incorporated in the process of writing a fundraising package the chances of success are greater.

133

Knowing how to write to donors or prospective donors is important. However, it is also necessary to know why donors respond to letters.

7.2.5. Reasons why people respond to fundraising letters

The reason why people send money differs from person to person. The following is an abbreviated list of possible reasons (Warwick, 1994: 62-68):

* They have been asked
* They have money available to give away
* They are in the habit of sending money by mail
* They support similar organizations
* Their gifts will make a difference
* Gifts will accomplish something right now
* They are thanked for their gifts
* The organization gives something tangible in return
* The organization enables them to do something about a problem
* The organization gives them a chance to be associated with a famous or worthy person
*The organization allows them to get back at the corrupt or the unjust
* The organization gives them the opportunity to belong
* The organization enables them to offer their opinions
* The organization provides inside information
* The organization helps them learn about a complex or interesting problem
* The organization helps them preserve their worldview, by validating cherished values and beliefs
* The organization allows them to gain personal connections with other individuals who feel the same as the donor
* The organization gives the opportunity to release emotional tension
* The organization allows them to relieve their guilt
* Because they feel it is their duty.

7.3 THE PRACTICE

Based on theory attended to above, the following packages are critically discussed in some detail: acquisition and renewal letters.

7.3.1 Good examples

Five packages will be critically discussed and include the following: The Salvation Army, the Archdiocese of Durban, the National Sea Rescue Institute, the SA Blind Workers Organisation and the Christian Seaman's Organisation. The reasons why these packages are good examples are given with each discussion.

(a) Package A.: The Salvation Army. (Figure 7.3- 7.7)

The first package to be discussed is one that was written for the Salvation Army. This letter was a donor renewal Christmas appeal.

The package consists of a striking red outer window envelope, a three-page A5 letter, a Christmas card to be signed and returned to the organization, a reply device and a pre-addressed return envelope. Red and black are used throughout the mailing.

(1) The package:

The package is not overdone, is not glossy and has a "home grown" feel about it. The principle correctly applied here is that it is vital to never overstate. Use of a glossy package might induce the donor to think that, if the organization has money to "waste" on a glossy package, it does not need money.

(2) The letter:

* The address of the donor is printed on the letter in this package. This is folded in such a way as to show through the window of the outer envelope. The address is printed again on the return-slip.

* The letter consists of short paragraphs, a serif font is used and is very readable.

* Through indentation of paragraphs, white space is created.

* It is personalized, makes use of "you" and a post script, and acknowledges previous support.

* The reader is involved by virtue of the fact that he or she must sign and return the Christmas card.

* It explains what the donation will be used for.

* The content is an emotional human story and something the reader can understand.

(3) The return slip:

* Is easy to understand.

* It suggests possible donation amounts.

* It summarizes what the letter has said and the donor's particulars are pre-printed on the slip, making it very easy to send a donation.

(4) The return envelope:

* Is pre-addressed with an indication of where to stick the stamp.

* It is the same size as the Christmas card and the slip (together with the donation) will fit in easily.

(b) Package B. Archdiocese of Durban. (Figure 7.8- 7.11)

This package was written for the Archdiocese of Durban and was a Christmas donor renewal mailing.

The package consists of an outer window envelope, a two-page A4 letter with a premium (free gift), a return slip and a return envelope.

(1) The package:

* Is not glossy but very colourful. The postage paid on the outer envelope is brightly coloured with red, blue, yellow and green and it has an "Africa-feel" to it.
* The die-cut window on the back of the envelope through which the stamps (gift) can be seen is an interesting device. The stamps are brightly coloured blue, yellow, red and green, creating an immediate interest.

(2) The letter:

* The top of the letter is formed by Christmas stamps which the donors can use. In order to accommodate this, the letterhead is moved innovatively to the bottom of the page.
* Short indented paragraphs are used, as are sentences starting with 'and'. "You" and a post script are also employed.
* The letter is personalized and acknowledges previous support.
* Unlike the previous package, the reader's name appears in the letter in paragraph four. The story told is personal and the drawings "come from a child who has been given a chance - by you". It is written from the reader's perspective.
* A serif typeface is used.

(3) The return-slip:

* The address of the donor is printed on the return-slip and packaged in such a way as to show through the outer window envelope.
* This slip differs from the one discussed in package A. It differs in size and shape and has a picture printed on it together with a written message.
* As with package A, if the letter is lost, the donor still knows what it is all about and what is expected of him or her.
* The slip is easily understood, suggests possible donation amounts and is the same size as the return envelope. The donation together with the slip fits easily into the envelope.

(4) The return envelope:

* The envelope is plain, but it has the return address on it as well as an indication

of where the stamp must be affixed before mailing the donation back.

(c) Package C. The National Sea Rescue. (Figure 7.12-7.15)

This package was written for The National Sea Rescue Institute and was a donor renewal mailing. The package consists of an outer window envelope, a two-page A4 letter, a return-slip and return envelope. The colours used are different shades of blue.

(1) The package:

* The package is plain but tasteful.

(2) The letter:

* This letter is not personalized. It starts with "Dear friend".
* Page one is printed with a slant. This eye-catching layout and the strong opening are linked together.
* Part of the letterhead - the emblem - is at the bottom left of the first page while the rest of the information is at the bottom of the second page.
* This letter contains short sentences and paragraphs, indent sentences and paragraphs, and starts sentences with "and" and "that".
* The post script is hand-written in blue - the same colour as the signature.

(3) The return-slip:

* The slip is easily understood. It gives all the relevant information needed to make a donation.
* The donor's details are printed on the return-slip and are displayed in the window envelope when mailed to the donor.
* This slip also has an interesting feature, a tear-off note on the left addressed to the donor with a photo of one of the volunteers. At the back of the slip the donor is thanked for his support.

(4) The return envelope:

* It is a plain white envelope with the return address and as with the previous packages, a note where the stamp should be affixed.

(d) Package D. SA Blind Workers Organisation. (Figure 7.16-7.19)

This package was written for the SA Blind Workers Organisation and was a donor acquisition mailing. It consists of an outer window envelope, two-page A4 letter, a return-slip, return envelope and a free gift (fridge magnet).

(1) The package:

The package is plain but catchy. The same pinkish colour runs from the outer envelope to the letter to the return envelope. On the outer envelope a teaser is placed in an attempt to induce the reader to open the envelope.

(2) The letter:

* This letter starts with a Johnson-box in the left top corner. It is underlined and in bold in order to create interest.
* It is a non-personalized letter, starting with 'Dear Friend'.
* It has an intriguing opening sentence.
* More use is made of underlining in this letter.
* Short paragraphs and sentences are used as indenting.
* In this letter the writer uses the PS and PPS where the PPS is to focus on the free gift - the fridge magnet.

(3) The return-slip:

* The slip is easily understood. It gives all the relevant information needed to make a donation.
* The donor's details are printed on the return-slip and are displayed in the window envelope when mailed to the donor.

* This slip looks like the one used in package B except for the fact that the message is not hand-written. It does however suggest possible donation amounts.

(4) The return envelope:

The return envelope is very plain. In this instance not even a message is written where the stamp will be affixed.

(e) Package E. The Christian Seaman's Organisation. (Figure 7.20-7.22)

This package was written for the Christian Seaman's Organisation and was a donor acquisition mailing. The package consists of an outer window envelope, a two-page A5 letter, a free gift (labels), a return-slip and a return envelope.

(1) The package:

* The package is not glossy and is professionally done.
* The same colour - light blue - is used in different shades throughout the package and is consistent with the colours of the organization.
* The outer window envelope has a message in the window which is apparent when the contents of the package are removed.

(2) The letter:

* A hand-written message in blue appears above the labels to create interest, and is closely linked to the message on the outer envelope.
* The labels are full colour and have the addressee's name and address printed on them. They are affixed in such a manner that they are visible through the outer window envelope.
* The letter is not personalized as it is a donor acquisition mailing.
* The same font and style are used as in the other packages discussed.
* The post script is used to attract attention to the free gift.
* The story told is a human story and is emotional.

(3) The return-slip:

* The letterhead is repeated on the slip.
* All the relevant information needed to send a donation is on the slip.
* A photograph with a message appears on the return-slip, leaving no doubt in the reader's mind about what a donation can do.

(4) The return envelope:

* The envelope is plain with the return address on it as well as a message where the stamp must be affixed.

141

Figure 7.3: Package A: The Salvation Army
Page 1 and 2 of the letter

THE SALVATION ARMY

"Heart to God and hand to man"

Mr L N Silversten
14 Terhave Road
Freeway Park
BOKSBURG

18 October 1996

Dear Mr Silversten

I'm sending you a special Christmas card
with this letter - but it's not for you to
keep.

Instead, I hope you'll sign your name in
it and return it to The Salvation Army.

Then I'll pass it on to someone who
really needs the warmth of your kindness
this Christmas.

Imagine what it will mean to a father
who's fallen on hard times ...

Over please ...

– 2 –

and lost his job, his home, and his self-
respect ... to know that someone cares.

Or a mother who knows the helpless anguish
of an empty purse - when her child is crying
with hunger.

Or an elderly pensioner who will spend
Christmas Day all alone.

Receiving your Christmas card,
filled with loving messages,
will give them such hope and
encouragement.

And if you can possibly include another
generous donation to go with your card - like
the one you sent previously - it will provide
practical help as well.

Shelter for a destitute family at one of
our Crisis Centres ... a good hot meal ...
some desperately needed clothing or a pair of
shoes ... perhaps even a few sweets for a
child who would otherwise be 'forgotten' by
Father Christmas.

This is what your
kindness makes possible.

Need has no season. But Christmas
is a special time to help others. So

Over please ...

please will you join with us now?

The joy you bring to those who are less
fortunate is what makes Christmas Christmas!
Please be as generous as you possibly can.

Thank you and God bless.

CAPTAIN LEN MILLAR
Public Relations Secretary

PS   Almost two thousand years ago, our Lord
     Jesus Christ was born in a stable, because
     his parents were unable to find shelter
     for the night.

     Unbelievable as it may seem in this day
     and age, there are still people - some of
     them quite close neighbours of yours - who
     don't know where they will spend Christmas
     night. Help us make room for each and
     every one of them - by
     sending your
     gift today.
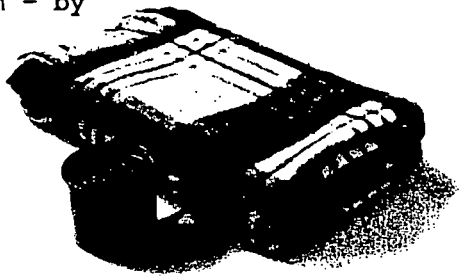
Figure 7.4: Package A: The Salvation Army continued

Page 3 of the letter

Figure 7.5: Package A: The Salvation Army continued
The Christmas card to be signed and returned

May you have the
spirit of Christmas,
which is peace.

The gladness of Christmas,
which is hope,

The heart of Christmas,
which is love.

Even though we've never met,
my thoughts are with you
at this special time of year.
May God bless you
and keep you.

With love from

Figure 7.6: Package A: The Salvation Army continued
The return-slip. The front (bottom) and the back (top)

If you prefer to make your gift by credit card, please fill in these details.

Please debit my Master/Visa/American Express Card in the amount of R.............................

☐ once only   ☐ every month

Card no. [ ][ ][ ] [ ][ ][ ][ ] [ ][ ][ ][ ] [ ][ ][ ][ ]

Expiry date M M Y Y
[ ][ ][ ][ ]

Signature ....

Authority for donation by DEBIT ORDER to THE SALVATION ARMY

Name...

Address ....

.... Postal Code ....

Tel. (H) .... (B) ....

I wish to sponsor by debit order the amount of R..................... on the

first day of .... 1996 and each month thereafter.

Acc No. ....Bank/Building Society ....

Branch name and address ....

City/Town .... Branch Code ....

NB Only current and transmission accounts may be used for debit order purposes.

Date .... Signature (as for signing cheques)

To [The Salvation Army shield logo] **P O Box 32217, Braamfontein 2017**

Fundraising No. 01 [000001 cont. 5]

"Fear not: for, behold, I bring you good tidings of great joy"

Luke 2:10

☐ I want to share with someone less fortunate this Christmas. Please use my gift of

( ) **R35**   ( ) **R50**   ( ) **R100**

( ) **R......... (any other amount)**

to help someone in true and desperate need – and pass on the signed card which I've enclosed, with my best wishes.

☐ Cheque/postal order enclosed.

☐ I have completed the credit card/debit order details overleaf.

☐ Please send information about leaving a bequest to The Salvation Army.

From

Mr L N Silversten
14 Terhave Road
Freeway Park
BOKSBURG

1CAR97 A006966

58..

Figure 7.7. Package A: The Salvation Army continued
                     The outer envelope at the bottom
                     The return envelope at the top

Christmas is a time for
sharing and caring.

Kersfees – 'n tyd om te gee
en óm te gee.

The Salvation Army
P O Box/Posbus 32217
Braamfontein
2017

5867

POSTAGE PAID
SOUTH AFRICA

SUID-AFRIKA
POSGELD BETAAL
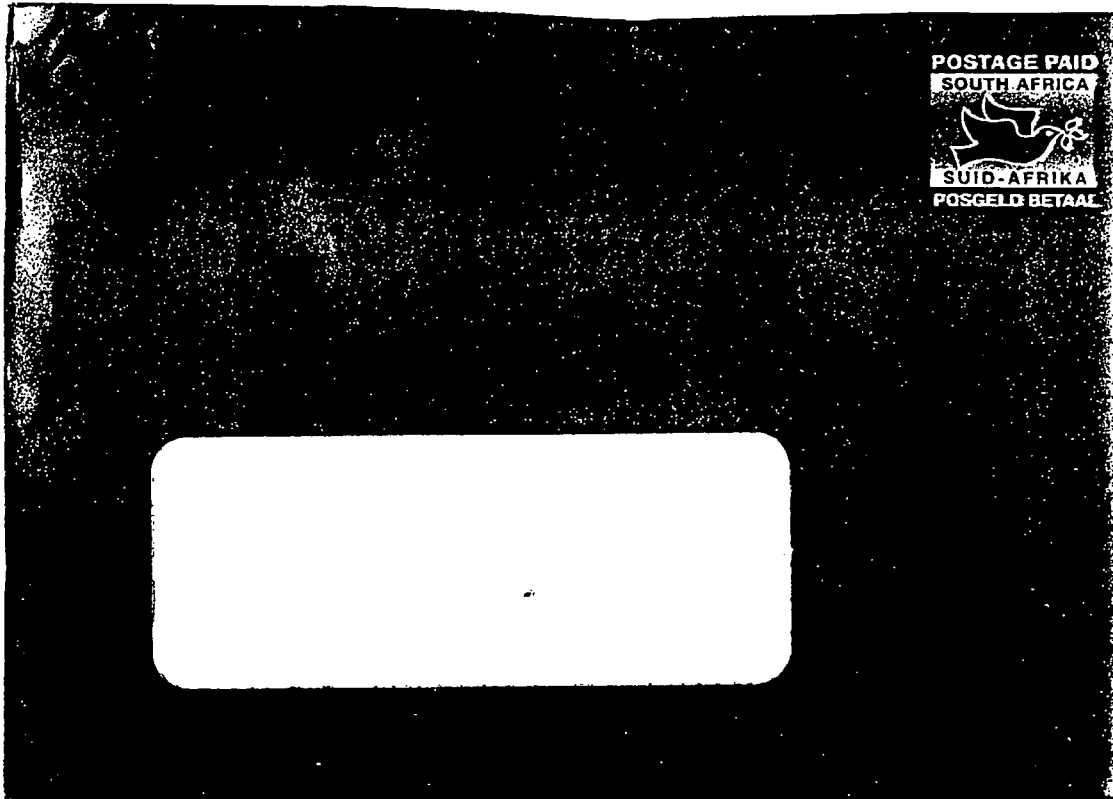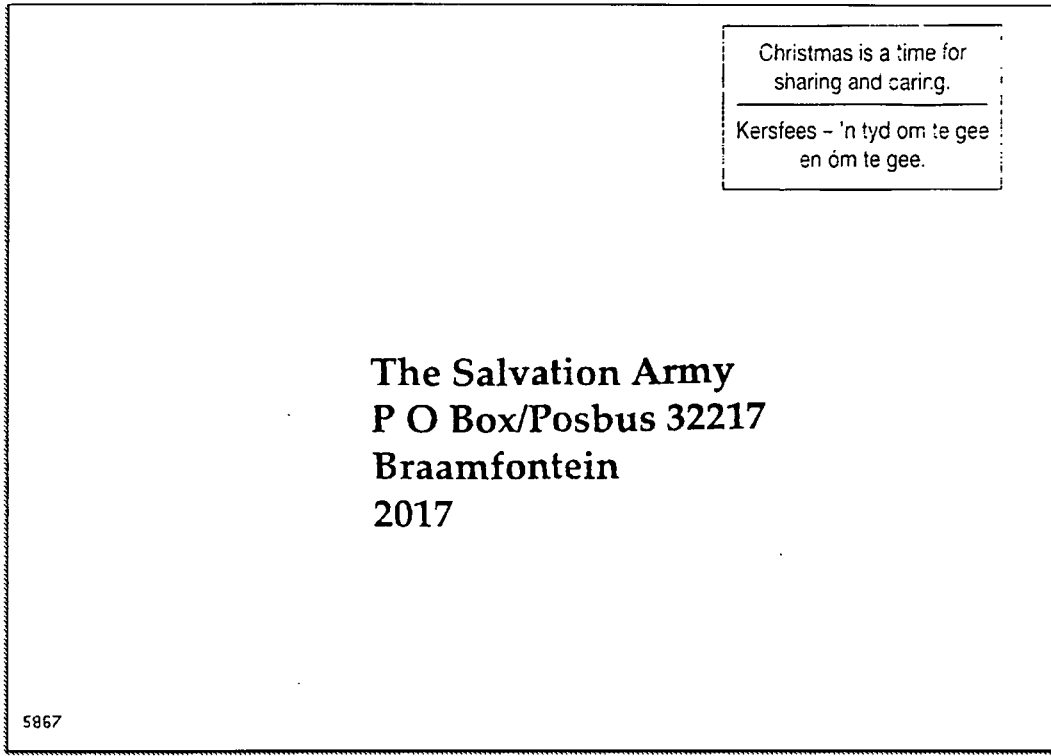
Figure 7.8. Package B: The Archdiocese package
Page 1 of the letter

Wishing you a blessed Christmas

I support the Zulu Missions (repeated on each panel)

The children really enjoyed doing these drawings – especially for you.

30 August 1996

Dear Mr Berg

I wanted to send you a small gift of thanks and love this Christmas. And I wanted it to be <u>from the children</u>.

So I asked the pupils at KwaThintwa School for the Deaf at Inchanga Mission to draw some pictures for their friends across the ocean.

And then we put the pictures onto these little seals for you to use on your Christmas mail.

Mr Berg, these drawings are really special, because they come from a child who has been given a chance – <u>by you</u>.

You see, it's your gifts that make a school like KwaThintwa possible, and give a child the chance to overcome the disability of deafness.

It's your gifts that take the faith to the Zulu people – through catechism, the Mass and the sacraments.

It's your gifts that help our mission priests create self-help programmes to overcome the crippling effects of rural poverty.

I could go on and on. But in essence, it's your gifts that keep our mission doors open.

And that's why I feel I can ask you again – for a Christmas gift to the missions. Because they simply wouldn't exist without you.

Over please ...

Catholic Archdiocese of Durban
Isifundabhishobhi samaKhathlolika saseThekwini

Most Reverend Willfrid F Napier, OFM
Diocesan Chancery Telephone (031) 3031417
P O Box 2164 Durban 4000 Natal South Africa

Figure 7.9: Package B: The archdiocese continued
Page 2 of the letter

```
                         - 2 -


        If you will use the enclosed reply form and envelope
to send your gift to me today, the work that you've
established will continue, to change lives amongst the Zulu
people.

        With your help, everything is possible.

        God bless you, and yours, with the peace and joys of
this beautiful season.   And may your generous giving be
returned to you a hundredfold.


                    Yours sincerely




                WILFRID F NAPIER, OFM
                Archbishop of Durban


    PS    I hope that the children's gift of Christmas seals
          will be a bright addition to your festive mail this
          year - proclaiming your support of the Church in
          Africa, together with your love and concern for the
          Zulu people.
```

Figure 7.10. Package B: The Archdiocese continued

The return-slip front and back

Your Christmas gift to the Zulu Missions helps other know and love the Christ Child as you know and love him.

Mr C G Berg
4335-5th N E
SEATTLE WA 98105-6108
U S A

TO: **Catholic Archdiocese of Durban**
Most Reverend Wilfrid F Napier OFM
Diocesan Chancery   Telephone (031) 3031417
P O Box 2164 Durban 4000 Natal South Africa

In celebration of the birth of Jesus I want to help spread His faith through the Zulu Missions, and enclose my Christmas gift of

(   )$20   (   )$30   (   )$45

(   )$ . . . . (any other amount)

☐ *Please send me details on how I can leave a bequest to the Archdiocese of Durban.*

Please write your special intentions for our Christmas Mass in the space provided overleaf

Your gift may be sent by check/postal order (made payable to the Archbishop of Durban).

5375C

C AD96 UBB A060776

**Please include my special intentions in your
Christmas Mass for friends of the Zulu Missions**

Figure 7.11. Package B: The Archdiocese continued
>   The outer envelope (top)
>   The return envelope (bottom)

**POSTAGE PAID
SOUTH AFRICA**

AIRMAIL

Our American
office will forward
your gift safely

Archdiocese of Durban
P O Box 96598
Washington, DC
20090-6598
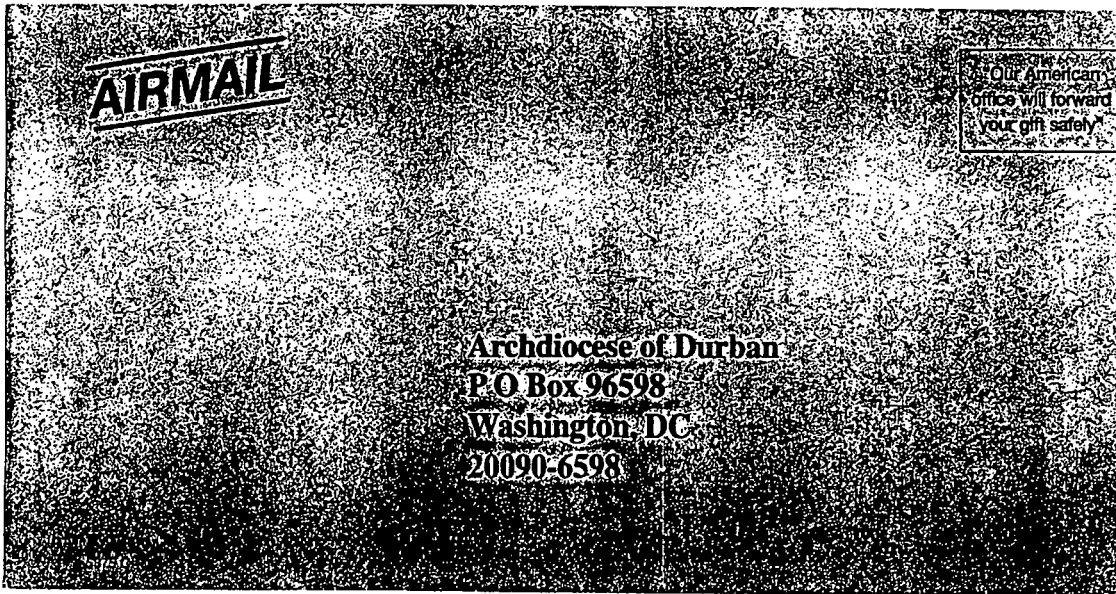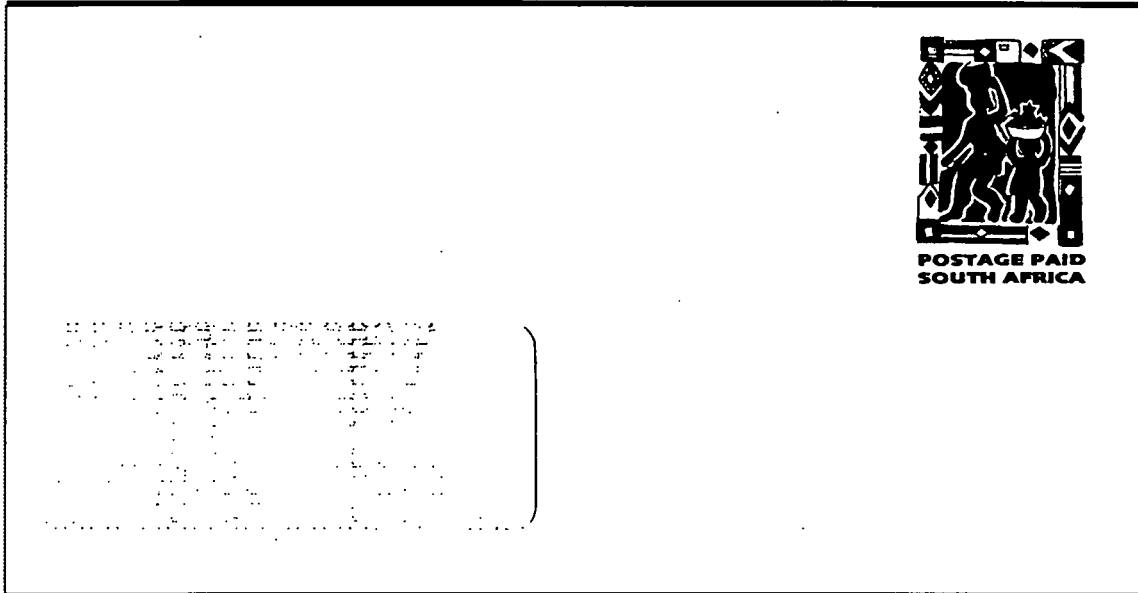
Figure 7.12. Package C: National Sea Rescue Institute
Page 1 of the letter

19 August 1996

Dear Friend

Reading this letter will give you some idea of what it's like being called out to rescue a sick seaman from the deck of a heaving oil tanker out at sea.

What it can't do is reproduce the danger, as the helicopter manoeuvres in close enough to winch you down to the deck below ... dodging the ship's superstructure as it swings wildly from side to side.

On the deck you can see members of the ship's crew, dressed in fire-proof suits, with massive hose-pipes at the ready – in case the pilot misjudges the distance and the helicopter comes crashing down in a ball of fire.

If that happens, you know your chances of survival are slim.

But there's a job to be done – someone on the ship has a suspected emergency appendicitis and Court Helicopters have requested the assistance of two specially trained NSRI crew members in getting him to hospital. So you put all thoughts of danger out of your mind and get on with it.

At times like this, it's heartening to know that you have training and equipment you need to deal with any situation – from assisting the helicopter to rescue an injured seaman to towing a floundering yacht back to safety through mountainous seas.

And I always say a silent prayer of thanks for the wonderful people back on shore who make all this possible ... by supporting the NSRI.

You are among these special friends, and I want to thank you once again for standing beside us when we go to sea to save lives.

But equipment doesn't last

National
Sea Rescue
Institute

Figure 7.13. Package C: National Sea Rescue Institute continued
Page 2 of the letter

-2-

forever. Flares and first-aid kits get used. Ropes wear
thin. Radio equipment requires maintenance. All these
items are essential to a successful rescue.

And it's your donations that enable us to replace,
repair and maintain this vital equipment in tip-top
condition.

That's why I'm hoping you will consider renewing your
wonderful support now.

Any amount you can afford to send – placed in the
envelope provided and posted back to us – will be
gratefully received.

And when you hear on the news, or read in your
newspaper, about another NSRI rescue, you can feel a sense
of pride, knowing you are part of it.

Thank you for being someone we can count on.

Yours sincerely

IAN WIENBURG
Chief Executive Officer

P.S. Our brave volunteer crew don't ask
for thanks, medals or payment. But they
do need your on-going support to
continue saving lives at sea.

2 VARNEYS ROAD, GREEN POINT 8001, P.O. BOX 154, GREEN POINT 8051
TELEPHONE (021) 434-5625, FACSIMILE (021) 434-5635

Figure 7.14. Package C: National Sea Rescue Institute continued
The return-slip front and back

Mr Morgan,
at any time of the day
or night, 365 days a
a year, our volunteer
crew are prepared to
face danger and
discomfort to answer
a call for help. All
they ask of you is
help in obtaining and
maintaining their
vital equipment.

To **National Sea Rescue Institute, P O Box 154, Green Point 8051**
Fundraising no. 08 800054 000 1

Yes, I'll stand beside the brave men and women of the National Sea Rescue Institute when they go to sea to save lives. My donation is in the amount of

( )R120   ( )R150   ( )R190

( )R...... any other amount, large or small

DR N004208

☐ Cheque/postal
order enclosed

☐ Please debit my
credit card as
detailed overleaf ⟹

Mr J P L Morgan
P O Box 858
2125 RANDBURG

*Please correct your address
details if necessary and return this
form with your donation so that
we may acknowledge your
generosity. Thank you.* 4642

PAYMENT BY CREDIT CARD

Please debit my Credit Card in the amount of
R................................

__ Every month   ☐ Once only

Type of card   ☐ Visa   ☐ Master

Card No ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐

Expiry Date ☐☐☐☐

Signature _____

National
Sea Rescue
Institute

*Thank you
for your
support.*

Figure 7.15. Package C: National Sea Rescue Institute continued
          The outer envelope at the top
          The return envelope at the bottom

POSTAGE PAID
SOUTH AFRICA

**Thanks for
helping
us save
lives at
sea**

National Sea Rescue Institute
P.O.Box 154
Green Point
8051

4842
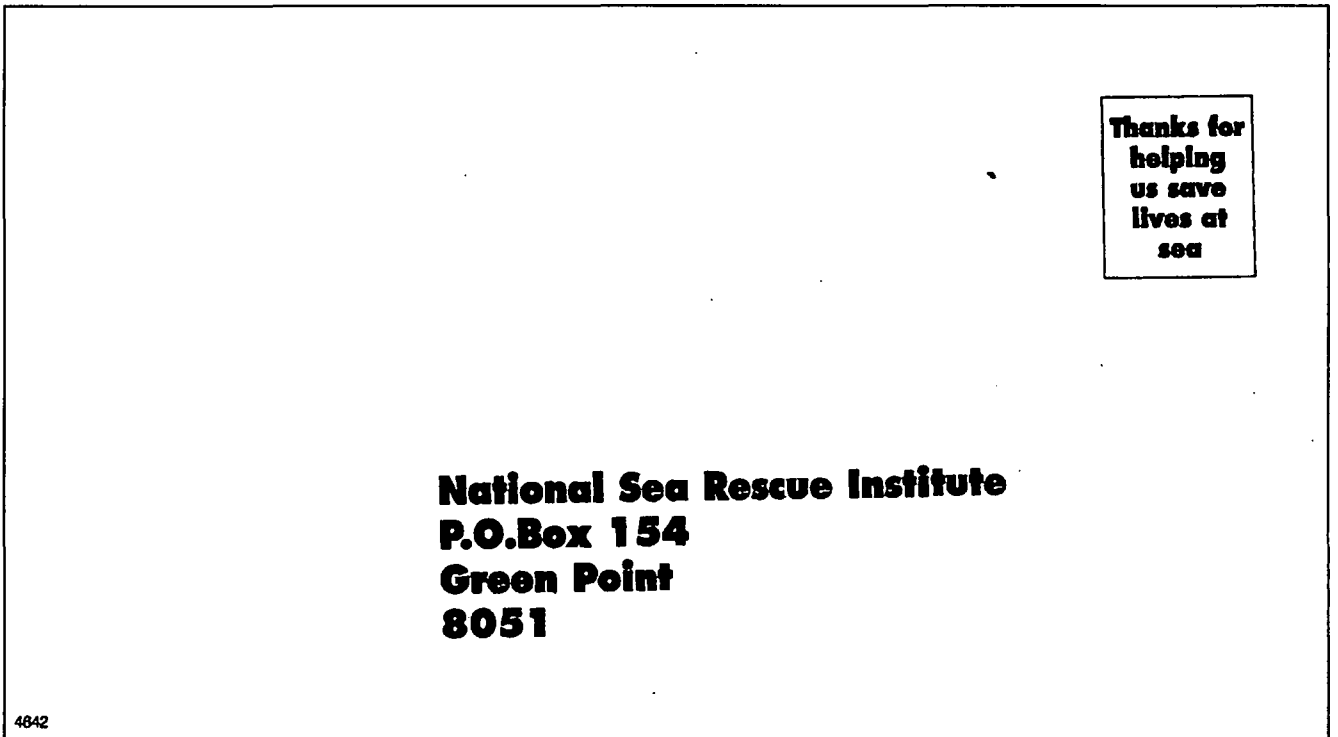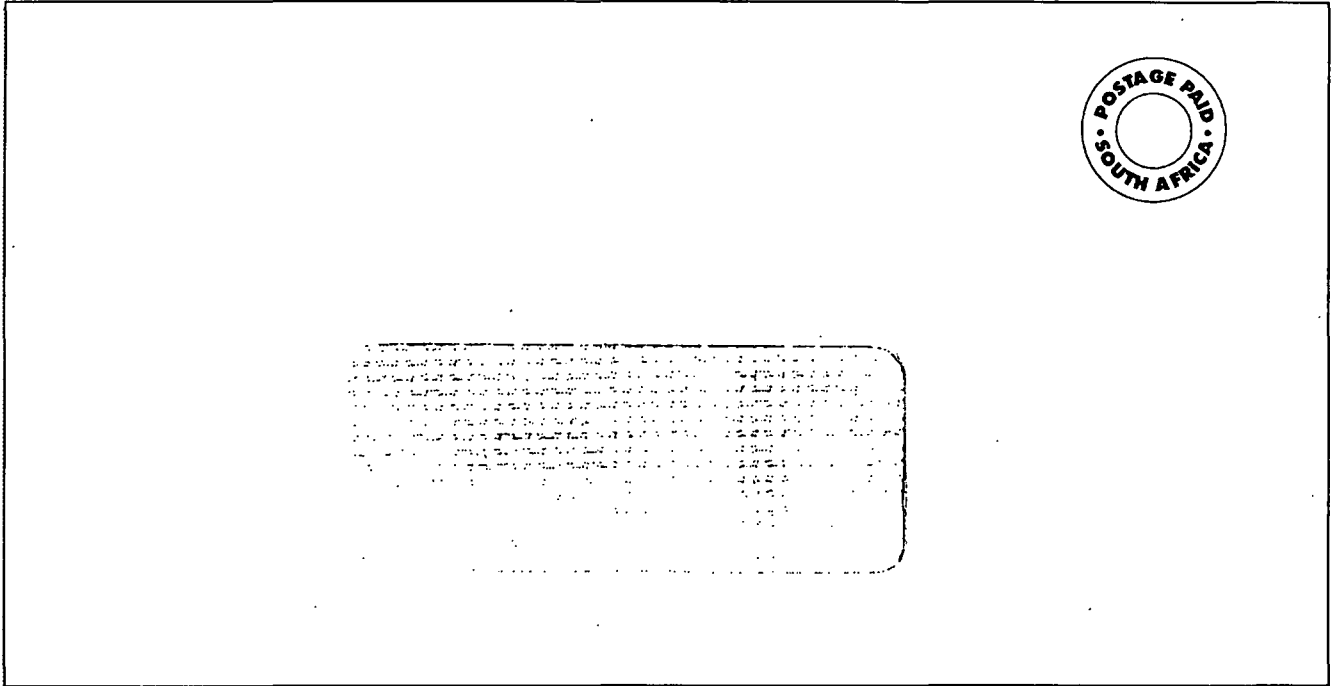
Figure 7.16. Package D: SA Blind Workers Organisation
 Page 1 of the letter

SA BLIND WORKERS ORGANISATION

102 EIGHTH AVENUE MAYFAIR 2092 PRIVATE BAG X9005 CROWN MINES 2025 TELEPHONE (011) 839-1793/4

1946 - 1996

Fundraising No.: 01 100039 000 8

<u>Would you send money for
a book you'll never read</u>?
<u>I hope so</u>!

21 October 1996

Dear Friend

When you were a youngster, did you ever read Beatrix Potter's *The Tale of Squirrel Nutkin* - or the *Lassie* stories?

These delightful classics have captivated children for generations.

And no doubt, there will be some little people who'll find these very same books under the tree this Christmas.

<u>Possibly even a blind child</u>.

Of course, it won't be the book as you remember it - with charming pictures and large 'read-it-yourself' type.

It will be a bulky volume, filled
with page after page of thick
brownish paper, enlivened only by
a forest of raised dots.

But it has the same power to entertain and enthral.

<u>In fact, unlike sighted children who can choose to
watch television or colour-in instead of reading - blind
boys and girls rely totally on braille books</u> to transport them into a magical world where animals talk and endings are always happy.

That's why we need to make more braille books available to our younger readers.

But with each master page costing R13.00 to produce - and a book like *Lassie* comprising many, many pages - we can't do it alone. <u>We need your help</u>.

So I'm writing to you in the hope that you may be able to make a donation ... so we'll be able to transcribe more well-loved children's books into braille.

Any amount you can send will be a great help. And my

Over please ...

Figure 7.17. Package D: SA Blind Workers Organisation continued
Page 2 of the letter

```
                           -  2  -




     heartfelt thanks and gratitude will be yours, if you use the
     enclosed form and envelope to send your donation right away.

                     You see, I remember how much my
                     braille books meant to me as a
                     child.

          I remember smuggling a book into bed with me at night, when
     I was at the Pioneer School for the Blind ... and how I was able
     to read my braille despite the strict 'lights out' rule.  Being
     able to read in the dark is one of the few advantages of being
     blind!

          Many years have passed since then, but reading is still one
     of my greatest pleasures.  For a visually disabled child, with
     so much still to learn about the world, it is essential.

          So please, will you help make more braille books available?
     Each R13.00 you send means one more master page can be produced.

          Thank you and God bless.

                     Yours sincerely




                     HAZEL MARSHALL
                     President

     PS    When you choose a Christmas gift for a beloved child or
           grandchild of your own, please spare a thought for mums and
           dads who have to find something suitable for a blind son or
           daughter.  A braille book would bring hours and hours of
           pleasure to them.

     PPS   Please keep the enclosed fridge magnet as a token of
           appreciation for your generosity.
```

Figure 7.18. Package D: SA Blind Workers Organisation continued
The return-slip front and back

TO SA BLIND WORKERS ORGANISATION

PRIVATE BAG X0005 CROWN MINES 2025   Fundraising No. 01-1000/0-000 8

Please give a book this Christmas ... a braille book to delight a little blind boy or girl. Your donation will make it possible for us to transcribe more favourite children's stories.

1946·1996

Yes, I'll help make it possible for a blind child to share the pleasure of reading. Here's my gift of

( )R35   ( )R60   ( )R100

( )R ....(any other amount)

Telephone (H) (...............) ....
(B) (...............) ....

Mr M A Hemmings
Mark Hemmings Machinery C C
P O Box 15260
3608 WESTMEAD

If you prefer to make your gift by credit card or debit order please complete details overleaf.

E MA 275061

Please correct your name and address if necessary, and return this form with your donation in the envelope provided. Thank you for your support.

4652C

Authority for donation by **DEBIT ORDER** to
SA Blind Workers Organisation

Name ....

Address ....

.... Postal Code ....

Telephone (H) .... (B) ....

I wish to sponsor by debit order the amount of R................... on

the first day of .... 19....... and each month thereafter.

Account No. ....

Bank/Building Society ....

Branch name and address ....

City/Town .... Branch Code ....

N.B. Only current and transmission accounts may be used for debit order purposes.

Date ....
Signature as for signing cheques

Authority for donation by **CREDIT CARD** to
SA Blind Workers Organisation

Name ....

Address ....

.... Postal Code ....

Telephone (H) .... (B) ....

Please debit my

☐ MASTERCARD   ☐ VISA CARD

With the amount of R...........................

☐ Once only   ☐ Every month

EXPIRY DATE
M M Y Y

Card No. ☐☐☐☐☐☐☐☐☐☐☐☐☐☐   ☐☐☐☐

Date ....
Signature

Figure 7.19. Package D: SA Blind Workers Organisation continued
        The outer envelope (middle)
        The return envelope (top)
        The free fridge magnet (bottom)
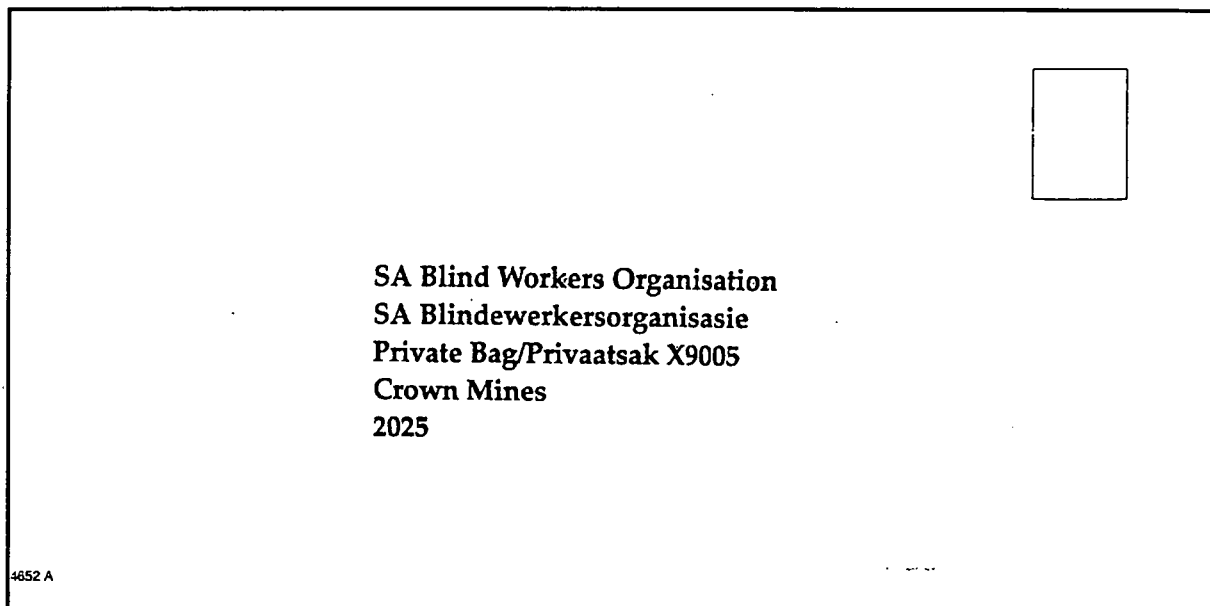
SA Blind Workers Organisation
SA Blindewerkersorganisasie
Private Bag/Privaatsak X9005
Crown Mines
2025

4652 A

FREE GIFT ENCLOSED

POSTAGE PAID
RSA
POSGELD BETAAL

Kindness is
a language
the blind can
understand.

SA BLIND WORKERS ORGANISATION

158
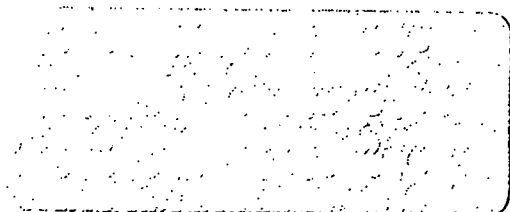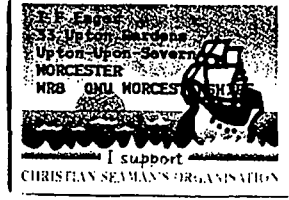
Figure 7.20. Package E: The Christian Seaman's Organisation
Page 1 and 2 of the letter

CHRISTIAN SEAMAN'S ORGANISATION

Religious Organisation for purposes of the Fundraising Act No. 107 of 1978

Durban • Cape Town • Richards Bay • Saldanha Bay • Port Elizabeth • Mossel Bay

Private Bag X09
Milnerton 7435
South Africa
(21) 551-2694

*For someone who is far from home,
a Bible brings joy and comfort.*

I support
CHRISTIAN SEAMAN'S ORGANISATION

19 April 1996

Dear Friend

I first met Ramon on the quayside at Cape Town Harbour.

He was a Filipino, a crew member of a cargo ship that had just docked. He stood there in T-shirt and jeans in the South East wind, and spoke to me in his broken English.

I discovered that he was a Christian ... but he had never possessed a Bible of his own! Fortunately, I had a copy of the Bible in Tagalog in my kit bag.

Ramon took the Bible in his hardened.

Over please ...

- 2 -

seaman's hands and clutched it against his cheek. Then the joy in his eyes turned to sadness as he told me of his 11 year-old daughter Rosarita, who was critically ill with leukaemia.

I took another Bible from my bag. "This is for Rosarita", I said. "Come let's pray for her."

Last year alone, we spoke to 40 000 seamen like Ramon. What a privilege it is for us to be there ... to offer our caring and our support. But particularly, to offer each a most precious gift – a Bible in his own language.

<u>But we can only do this if
others care ... if you care.</u>

Because it takes money to have Bibles printed in 62 different languages, ready to give away to seamen seeking the comfort of God's Holy Word.

Please will you partner us in this important work for God? Just a small gift covers the cost of a Bible for Ramon and his daughter. And if you can possibly send more, it would be such a blessing.

Thank you and God bless,

A J G DREYER
Chairman

PS Next time you send a card or letter, please use the address labels I've attached - you'll be reminded of the comfort 'your' Bible has brought to a sailor like Ramon, whose address is 'somewhere at sea'.

Figure 7.21. Package E: The Christian Seaman's Organisation continued
The return-slip

TO:

CHRISTIAN SEAMAN'S ORGANISATION

FROM:

Mrs I F Eager
33 Upton Gardens
Upton-Upon-Severn
WORCESTER WORCESTERSHIRE
WR8 U K

UCR 0009338

Yes I want to be the bearer
of Good News. I'm enclosing

( ) £13 to sponsor the cost of 5 Bibles
( ) £26 to sponsor the cost of 10 Bibles
( ) £52 to sponsor the cost of 20 Bibles
( ) £ .... any other amount,
large or small, towards Bibles
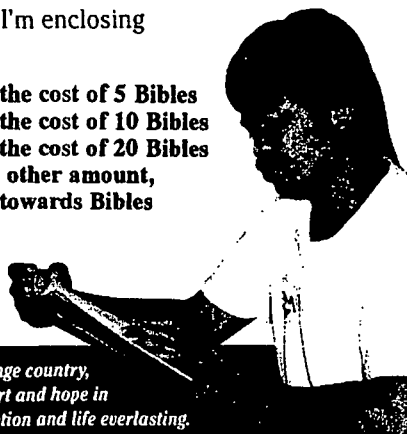
4929

*Far from home in a strange country,
this seaman finds comfort and hope in
God's promise of redemption and life everlasting.*

Figure 7.22. Package E: The Christian Seaman's Organisation continued
The outer envelope (top)
The return envelope (bottom)

"*Lord watch over and protect our sailors, whose work takes them so far from their homes and families.*"

Airmail postage here
means your gift can be
put to work right away

Christian Seaman's Organisation
Private Bag X09
Milnerton
7435
South Africa
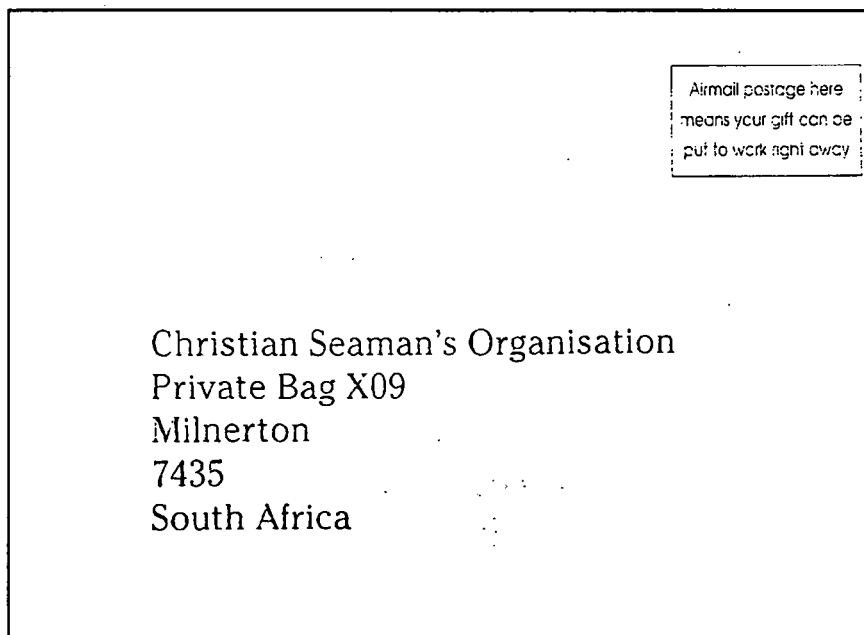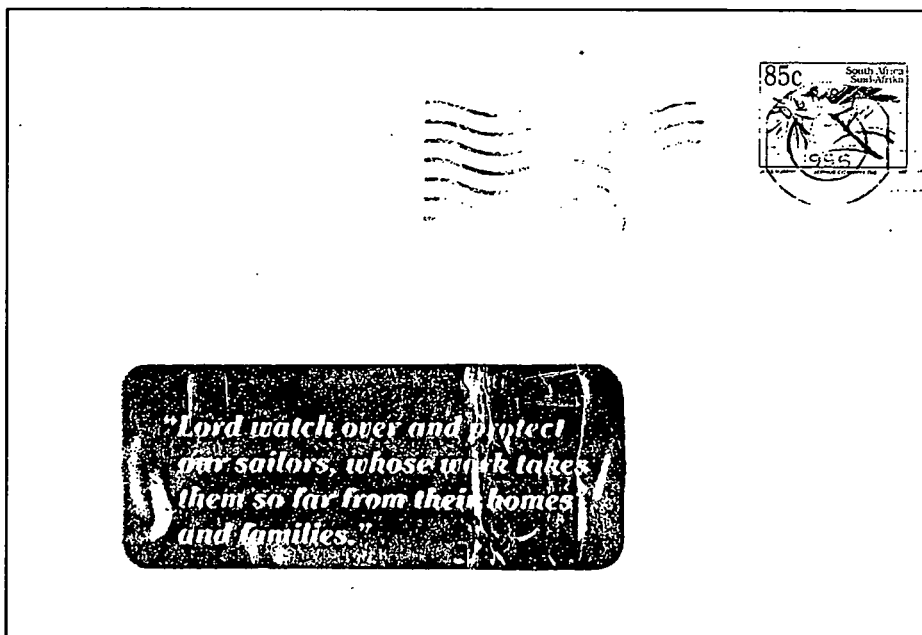
7.3.2 Less successfully presented examples

Keeping the good examples in mind, four less successfully presented packages are now examined: Tape Aids for the Blind, World Wide Fund for Nature, DEAFSA Pioneers and Scripture Union.

(a) Package 1: Tape Aids for the Blind. (Figure 7.23-7.25)

This package was written for Tape Aids for the Blind. It is not possible to ascertain whether it is a donor renewal or donor acquisition mailing. The package consists of a white window envelope, a light blue Father's Day card, a return-slip and a return envelope.

What is wrong:

* The outer envelope has a badly printed postage paid in the right-hand corner. It was done by machine and looks mass produced
* The mailing has no letter. This is a major mistake, as a letter should always be included when asking for financial support.
* The package uses facts and figures rather than a human-interest story. (Compare this package with package D).
* The package does not ask a donation.
* The debit order/credit card form does not make sense. Information of this kind should be very easily understood. If this is not done the donor will not even consider filling in a debit order.
* It makes use of a business reply envelope. This in itself is not wrong. But studies have shown that if a donor is willing to give a donation he or she is willing to put a stamp on the return envelope. This envelope also makes the package look too businesslike.

(b) Package 2: World Wide Fund for Nature. (Figure 7.26-7.28)

This package was written for the World Wide Fund for Nature. The package

consists of an outer envelope with a label, a one-page letter, an A4 return-slip and a business reply envelope.

What is wrong:

* The label with the addressee's name and address printed on the outer envelope as well as the different print for the salutation in the letter makes a mockery of the first line of the letter " I am writing to you personally". The printing is darker and it is clear that all the letters were pre-printed and then put through the printer again to insert the salutation.
* The postage paid on the outer envelope is rubberstamped and was badly done.
* The san serif typestyle makes the letter difficult to read.
* The letter does not indicate exactly what the money will be used for.
* The response-slip needs to be cut off from the rest of the page and the donor needs to fill in all his or her particulars. The process of making a gift should be made as easy as possible. In this case the donor will need to cut the page and must fill in all the details. Information above the slip is written on dark blue, making it very difficult to read.
* A business reply envelope is used.

(c) Package 3: DEAFSA Pioneers. (Figure 7.29-7.31)

This package was written for DEAFSA Pioneers and is probably a donor acquisition mailing. The package consists of outer window envelope, a one-page A4 letter, a return-slip on the back of the letter and a return envelope.

What is wrong:

* There is no date on the letter.
* The salutation of the letter should be "Dear Mrs du Toit" not "Dear Mrs D du Toit".
* The first sentence appears to be meaningless, and does succeed in gaining the reader's attention.
* The copy is very dry, making it difficult to relate to the problems of deaf people.
* The response-slip is printed on the back of the letter, indicating that the letter will

have to be returned. Alternatively, the slip will have to be cut out – in the process, destroying the contents of the letter.

* There is no credit card option for large amounts.

(d) Package 4: Scripture Union. (Figure 7.32)

This letter was written for Scripture Union and was a donor renewal mailing. Unfortunately the researcher only has access to the letter and not to the rest of the package, but the letter is an excellent example of what should not be done.

What is wrong:

* No specific date is given.
* There is no attempt to establish a one-on-one rapport. Instead, the communication is directed to the plural "Dear friends.
* Referring to the heading: ANNUAL FINANCE NEWSLETTER - a letter is not a newsletter and should not be handled as such. It also gives the impression of business and that is not what a letter should create.
* In the letter the writer talks to the donor as "we". It should be "I" - e.g. "I would like to ask you..".
* In the letter the suggestion is made that each person who has the work at heart should give R15,00. There is no such thing as everybody giving R15,00. The 80/20 principle also applies here. No person is the same. One donor will be able to give R500,00 and the other R5,00. The person able to give R500,00 will now only give R15,00 and the person that can only afford R5,00 will not give because the donor will think that the donation is not enough.
* Two people sign the letter. Only one person should do the writing.

Figure 7.23. Package 1: Tape Aids for the Blind
The card unfolded to A4
The outside of the card (top)
The inside of the card (bottom)

Did you know that **T**ape **A**ids for the **B**lind -

★ Provides a free library service to all blind and
print-handicapped persons

★ Provides a free educational service to 620 blind
students

★ Has some 307 Mini Libraries situated in Old Age
Homes, Hospitals and Schools for the handicapped

★ Sends out in excess of 1 800 taped books in one day

★ Provided 7.1 million listening hours last year

★ Receives no government or other subsidies

★ Provides playback equipment free to all in need.

★ Does not use the services of professional
fund raisers; all donations directly benefit our members

★ Would not be able to provide our valuable service
without the support of the public.

The production costs of this card were minimised
with in-house editorial layout, typesetting and printing
F.R. No: 06 600024 000 0

Happy Father's Day

Of you care for someone,

give them always a safe

place to cry and never a

reason to need it

*With love and gratitude
from
all our blind children*

Figure 7.24. Package 1: Tape Aid s for the Blind continued
The return-slip front (top) and back (bottom)

Tape Aids
for the Blind

A National Library Service for the Blind and Print-Handicapped

Head Office: Tape Aids House, 14 Mitchell Crescent, Durban 4001
P O Box 47016, Greyville 4023, South Africa

```
Mr TA Murray
P O Box 1921
Durban
4000
```

FA 97

Kindly complete and return your donation in the enclosed reply paid envelope.

Cheques should be made payable to **Tape Aids for the Blind** or use the form overleaf for payment
by credit card or debit order.

Yes I would like to help blind children to read

Here's my donation of:

☐ R35   ☐ R50   ☐ R75   ☐ R100   Other R☐

DEBIT ORDER / CREDIT CARD OPTION

Please debit my account / credit card no...
Type of account ....
monthly with amount of R..until cancelled
Bank: ....Branch no.:...............................
Name: ....
Expiry date: ....

Indicate with a cross in the appropriate square the period of payment.

Signature: ....

Single Payment	6	12	18	24 Months
Extended payment only for donations of R200 or more				

F.R. No 06 600024 000 0

Figure 7.25. Package 1: Tape Aids for the Blind continued
                The outer envelope (top)
                The return envelope (bottom)

POSTAGE PAID

GREYVILLE DURBAN

Postage
will be
paid by
addressee

Posgeld
sal deur die
geadresseerde
betaal word

BUSINESS REPLY SERVICE
FREEPOST NO. DN34

No postage
stamp necessary
if posted in
the Republic
of South Africa

Geen posgeld
nodig nie indien
in die Republiek
van Suid-Afrika
gepos

Mrs. P. Hoffman - National Director
Tape Aids for the Blind
Greyville 4023
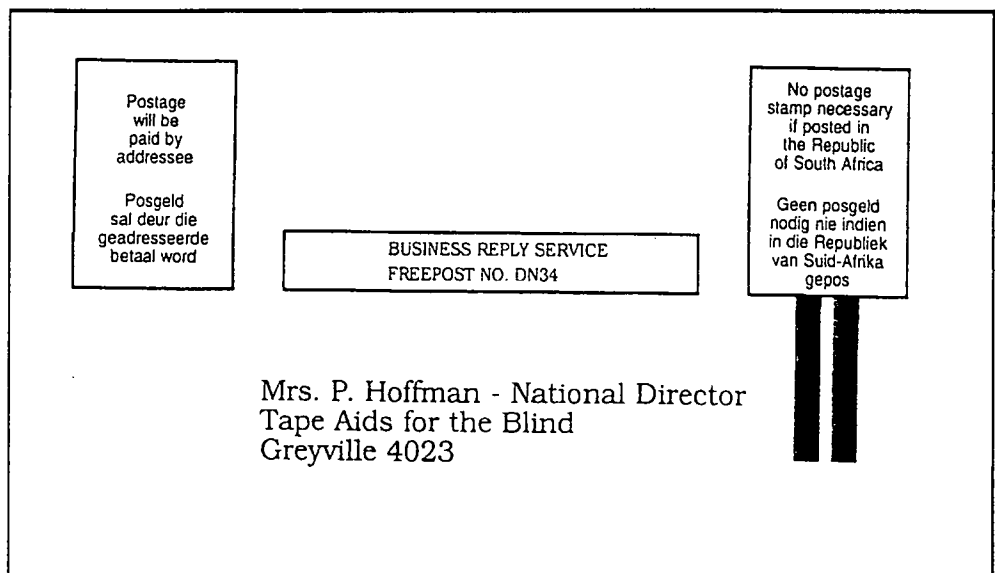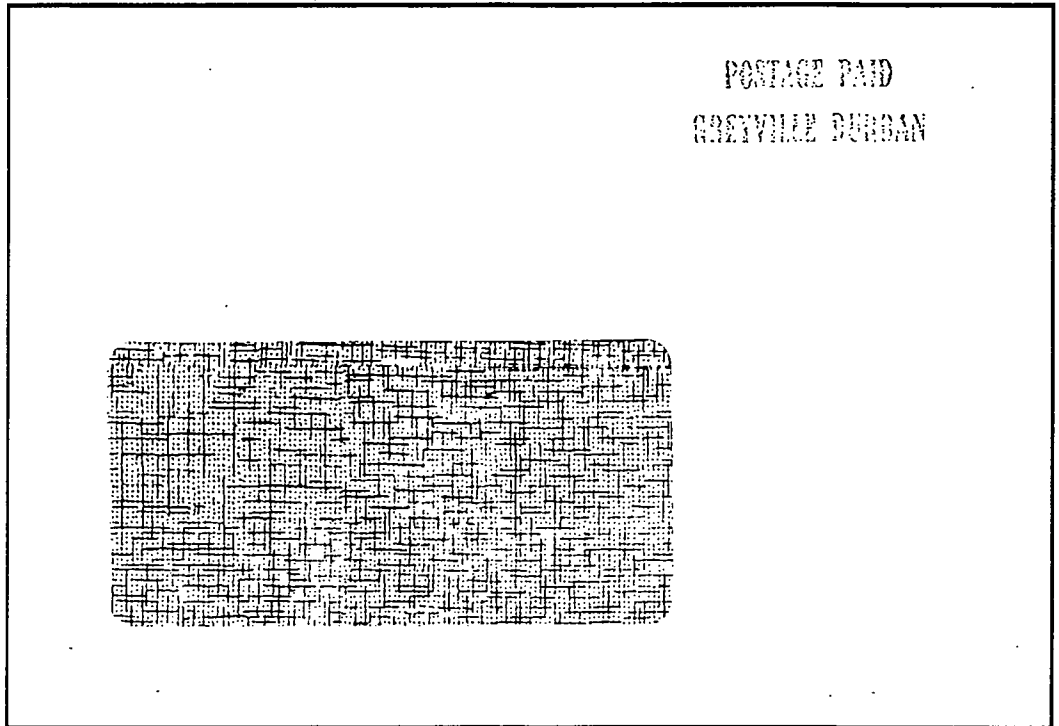
Figure 7.26. Package 2: WWF South Africa
The letter

World Wide Fund For Nature

WWF South Africa
(Formerly the Southern African Nature Foundation)

FR No. 08-800262-000-8
VAT No. 4820122481

"Voorgelegen"
116 Dorp Street
☒ 456, Stellenbosch, 7599
Republic of South Africa
☎ (021) 887 2801; FAX 887 9517

April 1997

BECOME A WWF-SA 1000-DAY SUPPORTER!

Dear Mrs du Toit

I am writing to you personally and trust that this letter will reach you on a very special day - as a matter of fact a day so special that it only occurs once in a thousand years!

5 April 1997 is such a day. It is <u>1000 days away from the turn of the century</u>, 1000 days away from a new millennium!

I thank you most sincerely for your generous on-going support which has made it possible for us to achieve many conservation successes over the years. As part of a select group of loyal WWF South Africa supporters, you are one of the first to be offered an opportunity to contribute to our 1000-Day Supporter appeal.

<u>All I now ask from you is a commitment of R1000</u> - a mere R1 per day for 1000 days till the year 2000. We trust that through this appeal we will recruit one thousand people to become 1000-Day Supporters - a unique way to mark this special day!

As a concerned and well-informed nature lover and conservationist you are no doubt aware of the many threats to our natural environment. Worldwide the speed of destruction of Earth's natural resources is accelerating and immediate action is crucially important if we are to halt this rapid decline. WWF-SA will be involved in various urgent <u>life-saving campaigns and projects</u> in southern Africa for the next 1000 days.

The funds raised through our WWF-SA 1000-Day Supporter Appeal together with our usual fundraising drives will enable WWF-SA to attain the monetary muscle and become an environmental force to be reckoned with - influencing environmental decision-making and legislation as well as initiating and supporting many innovative conservation projects aimed at <u>saving life on Earth for future generations.</u>

The Earth has been kind to you by providing you with nourishment, shelter, the many commodities of life and the enjoyment of the great outdoors. <u>Now is the time</u> for you to invest in the upkeep of Planet Earth.

During these 1000 days we know we can count on your support as never before!

With kind regards

DR IAN MACDONALD
CHIEF EXECUTIVE

P.S. Please complete the enclosed **WWF-SA 1000-Day Supporter Response Form** and return it with your donation in the reply-paid envelope provided for this purpose.

Figure 7.27: Package 2: WWF South Africa continued. The reply slip.

WWF 2000

WWF-SA 1000-DAY SUPPORTER APPEAL

THE GOALS OF WWF-SA's 1000-DAY SUPPORTER APPEAL

To conserve our wetlands, woodlands, water catchment areas and other endangered spaces, while emphasising the importance of involving local communities in all conservation activities

To save endangered species e.g. rhinos, sea turtles, rare birds, reptiles and whales - often sought after by the perpetrators of the illegal wildlife trade

To stop the depletion and serious over-exploitation of our natural resources e.g. the uncontrolled trade in timber, destructive fishing methods, excessive use of coal, oil and gas which is changing the global climate through high levels of carbon dioxide emissions

In a nutshell
- saving life on earth for future generations

ACKNOWLEDGEMENT TO WWF-SA 1000-DAY SUPPORTERS

A WWF-SA keyring, depicting the special **panda logo** that will be used worldwide by WWF to mark the Year 2000

A WWF-SA 1000-DAY SUPPORTER certificate acknowledging your R1000 donation

The satisfaction of knowing that you have made a commitment to help ensure that all South Africans will be able to cherish our birthright - a vibrant living world

---

WWF-SA 1000-DAY SUPPORTER RESPONSE FORM

As a token of my boundless gratitude for what I have received from Planet Earth and to help ensure that future generations will also be able to experience such joy, I pledge to donate the sum of at least R1000 - being R1 per day for each of the next 1000 days.

Please tick your option:

OPTION 1: R1000 ☐

OPTION 2: R500 ☐
and I promise to send another
donation of R500 in August 1998

OPTION 3: R250 ☐
and I promise to send three more
donations of R250 each in
December 1997
August 1998 and
April 1999

I enclose my crossed cheque/postal order
or debit my Master/Visa/Diners/Amex card

Card No: ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐

Expiry date:.........Signature:......................

Title:........Initials:.......Surname:.......................

Address: ....

....

.................................Code:................

Tel No:..

WWF 2000

Please post to : WWF-SA 1000-Day Supporter Appeal, PO Box 456, Stellenbosch, 7599
Tel: 021 887-2801; Fax: 021 887-9517 FR No: 08-800262-000-8; VAT No: 4820122481

Figure 7.28. Package 2: WWF South Africa continued. Outer and return envelope.

WWF

Mrs D du Toit
c/o 74 Glenashley Heights
Newport Avenue
GLENASHLEY
4051

Postage will be
paid by the
addressee

WWF®

Posgeld sal deur
die geadresseerde
betaal word

No postage stamp
required if posted
in RSA
_____
Posseël onnodig
indien in
RSA gepos

BESIGHEIDSANTWOORDDIENS
BUSINESS REPLY SERVICE
Vrypos Nr. / Free Post No. CB 8003

WWF-SA
P O BOX / POSBUS 456
STELLENBOSCH
7599

Figure 7.29. Package 3: DEAFSA Pioneers
The letter

DEAFSA
Pioneers

A021507
Mrs D D Toit
C/o 74 Glenashley Hts
Newport Avenue
Glenashley
4051

Dear Mrs D Toit

DEAFSA has a special group of generous supporters which we call our Pioneers.

We like to single this group out because it is due to their everlasting kindness, support and contributions, that we can really make a visible difference to the lives of all Deaf and hard of hearing people in South Africa.

The Pioneers' funds are appropriated for our four key objectives, namely Early Intervention, Sign Language and Interpreters' Development, Education and Provincial Development. These key areas will ensure that Deaf people become fully developed individuals and are on an equal footing with their hearing peers.

We call on you to become part of this caring and meaningful group because we see you as one of our regular contributors and cherished friends.

When we receive your contribution of R125 or more, we will send you an exclusive Pioneers telephone index as a token of our gratitude and to welcome you to the 1997 Pioneers!

You will also receive *The Echo* on a regular basis. This is a newsletter which keeps you up to date with our work, as well as developments in the Deaf community.

Please support us, we need you!

Kobus Kellerman - National Director

Thank you for caring!

DEAFSA
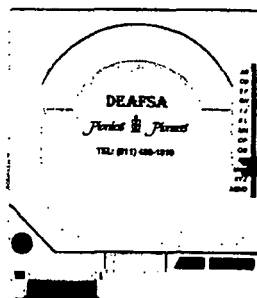
Please fill out the Membership Invitation on the reverse
side and join our group of very special friends.

Deaf Federation of South Africa
Private Bag X04, Westhoven, 2142
Fundraising number: 01 100058 000 7   ☎ (011) 482 - 1610

Figure 7.30. Package 3: DEAFSA Pioneers continued
The return-slip at the back of the letter

1997 Acceptance Form

I would once again like to be one of the Pioneers who support the cause of the Deaf. Included is my gift for:

☐ R125 *Ordinary Member*   ☐ R250 *Bronze Member*   ☐ R500 *Silver Member*   ☐ R1 000 *Gold Member*
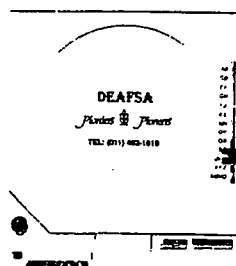
☐ Sorry, I cannot join the Pioneers Group now - but I include a special gift to give Deaf people more opportunities.

R _____

1997 Membership Invitation

Join the 1997 Pioneer Group now and upon receipt of your gift of R125 or more, you will receive this special Telephone index as a token of our appreciation.

DEAFSA

9702

Figure 7.31. Package 3: DEAFSA continued. The reply and outer envelope

Mr K Kellerman
DEAFSA
Private Bag/Privaatsak X4
2147 Westhoven
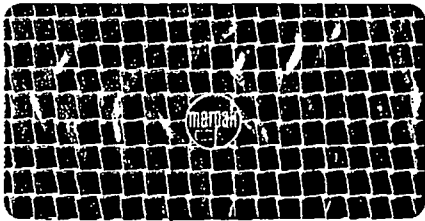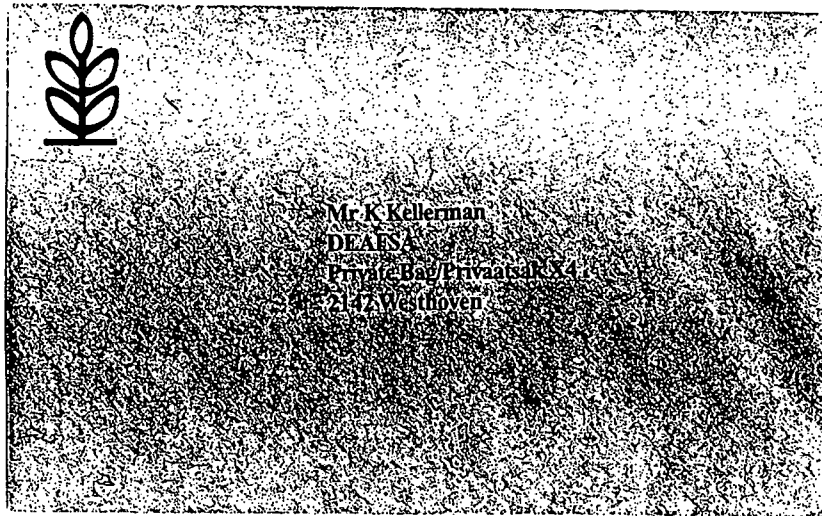
Figure 7.32. Package 4: Scripture Union. The letter

Scripture Union

WESTERN CAPE

July 1985

Dear friends

ANNUAL FINANCE NEWSLETTER.

A year ago we wrote to you explaining our financial headaches for that year.
The positive response from our friends at that time was very warming.

As we now approach the end of this financial year (August), we find ourselves
in an even more dangerous position. As the economic downturn has caused
individuals to feel the pinch, so has our income been curtailed.

As yet the situation is really not hopeless if a determined team effort is
made. If those who have our work at heart, each respond to this appeal
with a gift of, say, R15.00, representing R1.25 per month, the crisis will
be averted.

We would like to ask you to be part of this team effort. Please consider
it carefully. Our future depends on it.

Yours in Christ,

Graeme Gilmour   Harold le Roux
REGIONAL CHAIRMAN   REGIONAL DIRECTOR

.P.S.   Can we ask that you respond, using the enclosed envelope, within
        10 days.   That really would help - many thanks.

14 PARK ROAD, RONDEBOSCH, 7700. TELEPHONE: 69-8331
Scripture Union is a world-wide interdenominational movement. Incorporating: Students' Christian Association;
S.U. Groups in Schools; Inter-School Camps; S.U. Mini Camps; S.U. Holiday Clubs.
Regional Director: Harold le Roux B.A. (Hons) Dip.Theol.

7.4 SYNOPSIS

This chapter attempts to give a preview of what a reader does in the first twenty seconds, when receiving a package in the mail. It is divided in three phases, starting from the moment the package is received by the reader up to the first run through. It then discusses eight steps toward successful fundraising letters which include the marketing concept, the contents of the package, reply device, outer envelope, the lead, post script, underlining and text.

The sequence of a good letter is then discussed which is based on the AIDA principle: Attention, Interest, desire and action. This is followed by the rules or principles involved in writing a successful package. It is divided into three categories. The first has to do with language and includes everyday language, clichés, figures of speech humour and irony. The second involves subjects such as sentence construction, punctuation, underlining and contractions, repetitions and typesetting, underlining and italics, upper and lower casing, justification and the Johnson box and the third is about how the donor is handled in the letter. Together with this, reasons are given why people respond to fundraising letters.

After the theory has been discussed the Chapter reviews nine packages in detail, pointing out what is good about them and what is bad – based on the theory discussed earlier in the chapter.

It is also argued that if, the fundraiser understands the principles of copywriting and does the writing for the organization, it will be easier to produce a package that has a chance of success. If someone else does the writing, the fundraiser will know what to look for and what to avoid. It is concluded that there is no a magic formula to be used whenever a package is produced. The environment is constantly changing. What worked previously may not work again and what worked for one organization may not work for another. The organization should keep on using what works but also keep on testing new possibilities to keep up with the changing environment.

8. ETHICS IN FUNDRAISING

8.1 INTRODUCTION

Anderson (1996:31) refers to ethical decision-making as: "The practice of justifying through reason and experience what is good and right on the basis of generally if not universally acceptable and enduring principles." In the case of a Christian organization, the ethical basis used for decision-making is the Bible, where principles have been laid down for centuries.

For Christian organizations doing fundraising in an environment where many secular organizations use every means at their disposal to raise funds, no matter what the cost, it is sometimes difficult to make the right choices. Ethical decision-making goes much further that just what is legal. It goes beyond the enforceable. It is a moral and religious issue that needs to be addressed. Both the organization and the fundraiser need to know what the issues involved are. If no guidelines exist, there can be no consistency in decision-making. The end result will be that workers in an organization as well as the organization's donors will be confused. This will undoubtedly harm the organization and its work.

Many potential conflicts of interest exist in fundraising: between the donor and the organization, the donor and the fundraiser, and the fundraiser and the organization. Schmidt (1992:64) states that, in spite of the Christian organization's professed commitment to the Bible as the moral code it continues to be a difficult assignment to keep fundraising practices above reproach.

It is not a question of having more ethics or producing more guidelines and rules for the organization to follow. It is a question of being aware of ethical issues within the organization and of being accountable for one's actions within that organization and within society. Ethics is not an exact science, although they benefit from a structure or discipline guided by principles laid down by the organization.

8.2 THE BIBLICAL PRINCIPLE

Jesus summarized the Biblical principle on which a Christian organization's ethical principles are built. When Jesus was confronted by the question of "which is the greatest commandment in the Law?" Jesus answered, "Love the Lord your God with all your heart, with all your soul, and with all your mind. This is the greatest and the most important commandment. The second most important commandment is like it: Love your neighbour as you love yourself. The whole Law of Moses and the teachings of the prophets depend on these two commandments." (Matt.22:36-40)

This, in a nutshell, is the principle on which ethical decisions within Christian organizations are based. Jesus seems to fix on the principle of love (respect) for others, but a person cannot love or have respect for others if there is no self-love for oneself. This self-love is grounded not in what the person thinks of himself/herself but of what God thinks of that person - and God so loved the world that he gave His Son in order for us to live and have Eternal Life. He gave everything. He gave His life. This principle should be part of everything the organization does, from planning right down to every donation asked.

8.3 PRACTICAL ISSUES

In order to effect practically when discussing ethical issues the practitioner needs to have a greater awareness of the ethical issues that may arise in an organization. Anderson (1996:49,50) states that ethical issues seem to fall into two general kinds of actions: Those affecting donors or prospects and those affecting the organization.

8.3.1 Actions affecting donors/prospects

Actions affecting donors/prospects can include issues such as the misuse of donor funds, divulging donor/prospect information, intruding on the private affairs of donors, exploiting relationships and misleading donors.

* Misusing of donor funds: Organizations sometimes have crisis situations. This occurs frequently in Christian organizations. For example: The printer is broken

and no money is available to buy a new one or have the old one fixed. The Board decides that money that was received and earmarked for a specific project, say for buying Bibles, must be used to fix the printer. Phrases such as "the donors will understand" or "it is money that was given to the organization to use" are often heard. Is this ethical? The researcher thinks it is a blatant ethical indiscretion. Money should be used for the purpose it was given. The organization should be accountable to the donors. If this is not the case, donors lose confidence in organization.

* Divulging donor/prospect information: There is a tendency in organizations to sell their donor lists for one-time use to other organizations. This is legal. The question is whether it is ethical to do this without a donor's consent? Fundraisers also gather confidential information on prospects and donors for the purpose of cultivation and solicitation. The question as to how and for what this information is gathered needs to be addressed. Concern for the donor must always come first.

* Intruding on private affairs: Before the organization starts gathering information on donors and prospects a line should be drawn as to where the information gathering should stop. The question of what is needed and how the information is going to be used to solicit a donation should also be answered before the gathering starts.

* Exploiting relationships: Accepting a personal gift from someone may not be wrong but it can compromise the judgement of that person in the organization. If this is the case, should the gift be accepted? As argued earlier, fundraising is about building relationships. This becomes an ethical problem when the fundraiser tries to use this relationship to unduly influence the prospect or donor. The line between enough influence and too much is easily crossed especially in the process of convincing a donor to make a bequest to the organization.

* Misleading of donors: "Technological advancements about how and why donors respond can complicate matters. Sometimes the fundraiser's "pen" becomes mightier that the Word of God". Schmidt (1992:64) continues: "Rising organizational costs put increasing pressure on fundraising. Organizations also

face a unenthusiastic generation, the costly and difficult work in finding new donors and keeping current donors."

Organizations want to challenge their donors to be enthusiastic about the vision of the organization, but this does not mean overstating what the organization has achieved. Appeals are full of phrases such as: "Thousands were witnessed to...". These phrases are vague and mostly mean that the organization has badly and vague defined strategies and probably no results to report. The organization is not telling the truth or is not telling its donors exactly what is happening and therefore is not ethical.

8.3.2 Actions affecting the organization

Actions affecting the organization include issues such as: Conflicting interests, negligent security, altering or destroying records, questionable charges for services and living beyond the organization's means.

* Conflicting or competing interests: A good example is the matter of recruiting people to serve on the board of the organization or to work for the organization. The motives for asking people to come to the organization should handled carefully. Is this person asked purely because of the influence he or she has in a specific circle, and are the motives of the organization genuine?

* Negligent security: It is common sense that prospect and donor information should be handled with sensitivity but the organization should go beyond the law to justify the use or disclosure of such information. If information should leak out it can be very harmful to the organization.

* Altering and destroying records: The organization should be careful who has access to files of donors. It is easy to alter or destroy records or even infect computers with viruses if they are not protected. It is just as easy to get access to filing cabinets in order to alter or destroy records for personal gain. The only real thing stopping this from happening is the ethical or moral code of the persons

working in the organization.

* Payment for services rendered: Salaried employees should receive no other compensation without permission from the board. This also applies to the payment of a commission on an amount raised by an individual for the organization. This is generally seen as unethical because the motivation in raising these funds is questionable. Was it to benefit the organization, or to obtain the largest commission possible?

* Living beyond the means of the organization: Many Christian organizations live beyond their means. Why else do some organizations always send crisis appeals, live on the edge of survival, use designated funds improperly, overburden staff, have payables at 120 days and run over donors with heavy-handed appeals. A vision of what God wants to do through the organization is one thing, but for the organization to live beyond their means only creates an atmosphere of crisis and confusion amongst the donors (Schmidt, 1992:66).

This is by no means the only examples of actions affecting donors and the organization, the list is endless, but it does make the reader more aware of ethical issues in organizations.

8.4 PRINCIPLES OF ETHICS FOR FUNDRAISING

Anderson (1996:73-81) argues that there are three dominant ethical principles: Respect, beneficence (a sense of generosity) and trust.

8.4.1 Respect

Respect can be defined as having consideration or regard for others. The organization and the fundraiser should respect other people but this is not possible if there is no self-respect. These are three other related concepts in this domain:

* Autonomy: People are free to make choices, and the organization should

recognize this and avoid treating people merely as a means to an end.

* Privacy: Everyone has a right to privacy and confidentiality. If information is gathered this should be done within the boundaries set by the law of disclosure and not contravene the guidelines drawn by the organization.

* Protection: The organization should always be ready to limit actions that can jeopardize a person's well being.

8.4.2 Beneficence (a sense of charity)

Beneficence has much the same meaning as charity. This concept is very important to the organization and everybody that works for it. This sense of doing things for the greater public good and looking after the welfare of others should be developed within the organization.

8.4.3 Trust

Trust is central to this ethical relationship. Anderson (1996: 75) identifies five related rules under this topic: "Truth-telling, promise-keeping, accountability, fairness and fidelity of purpose."

* Truth-telling: The organization and its staff should always tell the truth. Information, no matter in what form, should never be misleading or deceiving.

* Promise-keeping: If a promise is made or contract signed within the guidelines of the organization it should not be broken.

* Accountability: It is imperative for the organization to set standards of accountability for the board, for its programmes, for information gathered and given, for financial support asked, for the use of funds and for the accounting and budgeting done within the organization. These must, as a matter of course, be open to scrutiny by donors and other interesting parties.

* Fairness: Everything done within the organization should be done with fairness, from the sharing of privileges to the sharing of responsibility.

* Fidelity (loyalty) of purpose: Everything that is done in the organization should be faithful to the purpose of the organization. The organization should avoid conflict of interests at all cost.

8.5 APPLYING THE PRINCIPLES

With these three fundamental principles (respect, beneficence and trust) in mind, a process can be developed to help the fundraiser and the organization take the right course of action. This process can be initiated by three questions:

* What seems to be right or wrong in the situation?
* What should be done?
* What ethical principle would justify the action?

The question, though, is how to apply these to the organization. The following hypothetical case will be used to discuss the process. Two "scenes" are be sketched.

Case study: Mission: Reach the World

The organization was established in 1981. Its mission is to reach seamen of different nationalities with the Word of God, within the harbours of South Africa, and issue where necessary, Bibles and other materials in the seaman's own language. The organization's administrative office is in Cape Town and consists of three full-time staff members, Sue, Alice and Jenny. Sue is responsible for all the planning of the fundraising office, while Alice and Jenny handle the day-to-day office administration as well as specific tasks assigned to them. For instance, Alice is responsible for phoning all donors seventy years and older on their birthday in the hope of a bequest or large donation. All three ladies are Christians and take pride in their work.

A visit to a donor: Alice has been working very hard to build solid relationships with the organization's older donors. It has now reached the point that some of the donors have invited her to come and visit them and that she has done so on many occasions. She feels that she has reached a point where she can suggest the possibility of a bequest. One of the donors, John, introduced Alice to his friend, Peter. Both are financially well off and Alice knows that if treated correctly they will be willing to make bequests. She decides to talk to John and ask him about the possibility of Peter giving a large gift to the organization with the hope that John will talk about his own intentions. She wants to do the same with Peter.

Questions:

What is wrong in this situation? Alice is using John and Peter and she is hiding her true intentions, which are to solicit a large gift or bequest from both of them. The question of using the information gathered in such a manner should also be answered.

What should be done? Alice should be sensitive when talking to donors about making a bequest. She will lose their trust, which she has built up with great care and compassion over the years.

What ethical principles are involved? She is abusing the principle of respect and trust.

A donor phones to request information: Sue, being in charge of the fundraising office, also does the financial statements. In her quest to see how the organization is doing she always analyse the accounts. These include the amounts spent on raising funds (administrative costs) as well as the money spent directly on the actual work being done. A donor phones, wanting to know how much money has been used on the actual work being done. Sue decides to incorporate the administrative costs into the figures of the missionwork being done.

Questions:

What is wrong in this situation? Sue is not telling the truth and she is not being properly accountable to the donor. The question of why Sue is not telling the truth should also be answered. Is it because the ratio between money spent and money received is not apparently acceptable? Is Sue "sharpening her pencil" to cover up problems she is not

addressing?

What should be done? Sue should tell the truth. Donors are not stupid and should not be treated as such. Most of them are aware of administrative costs.

Which ethical principles are involved? Sue is abusing the principle of respect and trust.

These are only two possible situations, which can arise within organizations. In these situations the principles have been applied and have helped to identify the ethical problems within Mission: Reach the World. The same process can be used in many situations. Most of the time it is a process that takes place without conscious thought. Importantly, if these principles are not applied and discussed, ethical issues will not be solved.

8.6 A CODE OF ETHICS

Anderson (1996:104) states that every code of ethics is unique to a specific organization but codes: "...tend to have certain elements in common:
* It begins with a statement of purpose which states that it is written for the sake of the greater public good;
* It identifies the major stakeholders and the responsibilities towards these stakeholders;
* It affirms good citizenship, confirming that it will uphold the law both in letter and in spirit;
 * It commits itself to upholding ethical principles (the unenforceable);
* It promotes an ethical concept such as trust to be central to the nature of the organization;
* It identifies private and public interests as well as the democratic rights of all;
* It gives special attention to the principle conflicts of interest that can arise."

First example: A donor bill of rights was developed by the American Association of Fund Raising Counsel, Association for Healthcare Philantrophy, Council for Advancement and Support of Education, National Society of Fundraising Executives; endorsed by Independent Sector, National Catholic Development Conference, National Committee on Planned Giving, National Council for Resource Development and United Ways (Anderson,1996: 117).

184

This was not written for a specific organization but is used by many organizations in the United States. In South Africa, this bill of rights is also used in many organizations as well as in seminars and training to help the fundraiser with ethical issues.

A DONOR BILL OF RIGHTS

PHILANTROPHY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that Philantrophy merits respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.

III. To have access to the organization's most recent financial statements.

IV. To be assured their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgement and recognition.

VI. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by the law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that and organization may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Second example: This was adopted by the National Society of Fund Raising executives in America (Anderson,1996: 120-121)

The National Society of Fundraising Executives exists to foster the development and growth of fund-raising professionals and profession, to preserve and enhance Philantrophy and volunteerism, and promote high ethical standards in the fund-raising profession.

To these ends, this code declares the ethical values and standards of professional practice which NSFRE members embrace and which they strive to uphold in their responsibilities for generating philanthropic support.

Members of the National Society of Fundraising Executives are motivated by an inner drive to improve the quality of life through the causes they serve. They seek to inspire others through their own sense of dedication and high purpose. They are committed to the improvements of their professional knowledge and skills in order that their performance will better serve others. They recognize their stewardship responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. Such individuals practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard public trust.

Furthermore, NSFRE members
* serve the ideal of Philantrophy, are committed to the preservation and enhancement of volunteerism, and hold stewardship of the concepts as the overriding principle of professional life;

* put charitable mission above personal gain, accepting compensation by salary or set fee only;

* foster cultural diversity and pluralistic values and treat all people with dignity and respect;

* affirm, through personal giving a commitment to philanthropy and its role in society;

* adhere to the spirit as well as the letter of all applicable laws and regulations;

* bring credit to the fund-raising profession by their public demeanour;

* recognize their individual boundaries of competence and are forthcoming about their professional qualifications and credentials;

* value privacy, freedom of choice, and interests of all those affected by their actions;

* disclose all relationships, which might constitute, or appear to constitute, conflicts of interest;

* actively encourage all their colleagues to embrace and practice these ethical principles;

* adhere to the following standards of professional practice in their responsibilities for generating philanthropic support.

This is then followed by a standard of professional practice.

In South Africa a code of ethics exist for fundraisers that are members of the Southern Africa Institute of Fundraisers (SAIF). All members must adhere to this code of ethics.

CODE OF PROFESSIONAL ETHICS

1.   We will associate with organisations and agencies employing ethical fundraising methods, pursuing worthwhile purpose and meeting needs demonstrably valid and consistent with the enhancement of human welfare.

2.   We will provide our fundraising services only for a salary paid to us as employees of an organisation or agency on whose behalf we work to raise funds or as retained

consultants on the basis of a specified fee determined prior to the commencement of the fundraising endeavour in respect of which our services are retained.

3.   We will encourage and give our full support to the provision of education and training of the highest practicable standards for those responsible for fundraising activities and do our utmost to improve technical and other performance standards within the profession; we will foster the sharing of ideas, experiences and practices so as to contribute as we can to the common pool of fundraising knowledge, to the good of organisations and agencies on whose behalf fundraisers work, and to the success of the causes and the welfare of the people such organisations and agencies seek to serve.

4.   We shall, among other things in respect of any organisation or agency we professionally serve:

* form predictions of fundraising results only on the basis of prior professional assessment of the particular circumstances and their bearing upon considerations important to such results;

* respect and safeguard the confidentiality proper to a professional relationship;

* unremittingly pursue our professional responsibilities placing before our own personal interests the best interests of the organisation or agency, its cause and those it endeavours to serve;

* recognize and discharge obligations to the organisation or agency in giving counsel and assistance in respect of the fulfilment of subscriptions, recording and other aspects of internal fundraising management.

5.   We will in good faith co-operate with fellow practitioners in curbing malpractice and culminating unethical and undesirable conduct within or impinging upon the fundraising profession and in particular will oppose and not wittingly be party to;

(a)   misrepresentation in any form including exaggerated claims of
        past achievements or offers or promises to raise unobtainable
        sums of money;

(b)   contracts or undertakings for fundraising services on the basis
        of a guarantee in respect of results or compensation in any
        form for the non-achievement of declared financial objectives,
        or involving:

    *   hidden costs to the organisation or agency
            recipient of the fundraising service,

    *   fees or payment for service as a percentage of or
            commission on amounts raised, or

    *   any payment as a premium for achieving a
            prescribed financial result.

These codes can be used as a starting point for any organization wishing to develop its
own code of ethics.

8.7 SYNOPSIS

This chapter discusses ethical decision-making in terms of the Biblical principles of: "Love
the Lord your God and love your neighbour as you love yourself." It looks at practical
ethical issues and defines two categories of action: Those affecting donors, which include
issues such as the misuse of funds, divulging donor information, intruding on private
affairs and exploiting and misleading donors. It also focuses on those issues affecting the
organization which include conflicting interests, negligent security, altering or destroying
records, questionable charges for services and living beyond the organization's means.

Three dominant ethical principles are then identified: Respect, beneficence and trust. A

process is then developed, using these principles and guided by three questions: What is wrong? What should be done? What ethical principle is involved.

An ethical code reflects an organization's mission and moral intentions, but if this is not used together with ethical awareness and reasoning that clarify and justify its norms, it has little purpose. In other words, if it is not interwoven into the everyday experiences of the organization, if it is not regularly reviewed in the light of experience, developing a code will be a waste of time. The Chapter then gives examples of a few ethical codes, which can be used as a basis to write a code for an organization.

Thinking ethically requires that the organization think clearly, that it is open and reasonable, requires self-examination (honestly looking at what is right and wrong), trust and solid principles - in this case the Word of God and actions that are morally justifiable.

As Christian organizations or Christian fundraisers there is no choice but to consider ethics and the role these play in an organization and community. Christian organizations are rightly examples that should be followed. The public expects the best from these organizations because it is believed their moral standards are high. "In matters of philanthropy and everywhere, being accountable to ourselves and others means taking ethically principled action: doing the right thing" (Anderson, 1996:118).

9. FUNDRAISING ADMINISTRATION AND FINANCIAL CONTROL

9.1 INTRODUCTION

Before discussing donation administration, donor administration and funding control, it is important to mention that the organization that is serious about fundraising, has to create an environment that is both professional and positive.

The fundraising office and its administration exist solely to provide support for the fundraising programme. The organization's office can be as simple as a single-person staff operation with manually-processed prospect and donor records or it can be as complex as a multifaceted, multiple-staffed development programme with sophisticated data processing and word processing equipment and procedures.

The fundraising programme determines the operation and purpose of the fundraising office. The basic requirement of the office staff is to be able to gather and store information and to have quick, easy and complete retrieval of information. Office staff should support staff in the field and make their job as easy as possible.

The office is the nerve centre. Gifts are received, recorded for accountability purposes, acknowledged, and catalogued to provide a historical profile of gifts for analysis and planning. All information is checked for accuracy and stored for easy retrieval.

The administration of office affairs should be procedurally routine and make minimal demands on a manager's time. The office should be strategically located, suitably equipped and appropriately furnished. If a computer system is used, the office should be organized around the system. If a manual system of information storage is used, an appropriate filing system should be in place.

If the fundraising office is to serve as a nerve centre for the fundraising function, then those in the office must be competent, sensitive and capable of working with the stresses and demands that are part of any successful fundraising office.

9.2 DONATION ADMINISTRATION

Earlier it was stated that the office receives gifts, records and acknowledges them and then catalogues them for future reference. The donors and their donations are what the organization is all about. Without contributions, the organization is unable to do the work it should. Competent donation management is therefore of the utmost importance.

The procedures followed in organizations naturally differ. However the following is perhaps a typical:

(a) Fetching the mail: Someone should be responsible for fetching the mail from the Post Office. It need not be the same person everytime, but it is important to have a good working relationship with the staff of the Post Office the organization uses, especially if the organization makes a lot of use of direct mail.

(b) Sorting and opening mail: The next step is to sort and open the mail. It is not always possible to have two staff members to attend to this function, but according to sound financial principles it is advisable for two persons to open the mail. If this is not possible the organization must be absolutely sure that the person in this position can be trusted as many donors send cash and postal orders by mail.

(c) Processing of donations: The actual processing of gifts is the responsibility of a single person. The attention of one person to this procedure can help regularize it, reducing to a minimum any chance of error and oversight. Typically, four types of donations are received: cash, postal orders, cheques and credit card vouchers. Debit orders and stop orders can also be received but they are processed separately (the organization's bank attends to this). Together with the donations, donors usually send their donation-slips with all their details pre-printed on them. If this is not the case, a donation-slip should be made out with all the relevant detail written on it.

All other possible information should also be written on the slip, such as the bank name, branch and account number if the donation is a cheque. Sometimes telephone numbers and ID numbers are also pre-printed on cheques. These should also be noted. This information will be given to the person responsible for the input in the computer. After this

has been done the person responsible for the processing of the donations will make up the bank, for banking the same day, if possible. All the donation-slips, together with a banking summary will then be given to the person responsible for input in the computer and the thanking of the donors.

(d) Daily donation capture and thanking: Most organizations have computer donor bases, where donations are captured in order to thank their donors. After the donations have been captured, a donation summary is printed to ensure that it balances with the bank summary. There are three checkpoints in this system: The bank, the donor-slip summary, and the computer summary.

Some organizations still write out or print receipts for donors, but this is better linked to the thank-you letter by merging the amount received from the donor into the thank-you letter. Most word processors have this ability. By doing this, the letter is more personal, it takes the place of the receipt, saves paper and most important, saves time. In some cases individual donors will specifically ask for a receipt, and these cases a receipt should be included in the thank-you letter.

A more formal approach is needed with businesses and trusts. The person responsible should also be in charge of thank-you letters and further follow-ups. The information entered on the computer should ideally be undertaken by the person responsible for the fundraising.

Letters from individuals, should be read, answered, and information needed for the donor's history file should be marked for input on the computer. Information such as births, deaths, health and other general information donors give, should be dated and stored for future reference. These letters should also be kept and used when the thank-you letters are made ready for mailing. This is when the "PS" on the letter comes in handy as a personalized reaction to donor's letters. This part of the process takes time, but is nevertheless crucial. If not done immediately, it probably will never be done. It is important to finalise one batch completely before starting the next.

(e) Month-end: At the month-end, a monthly donation summary should be printed, using the donation history on the computer. Possible information includes a break-down of

types of donors, the total amount received as well as the average donation for a specific type of donor for that month. This computer-generated summary needs to balance with the banking summary of that specific month. The information is then given to the person responsible for the reconciliation of the bank and financial statements and these should also balance. The reason why this is so important is to be found in the chapter on ethics: Working with the money of others who generally trust organizations blindly, is a great fiduciary responsibility.

Together with the monthly donation computer summary, a year-to-date summary can also be generated. This can be used to compare donations with previous years and is a good source for planning. The important thing is that the organization must decide on the format in which the information should be printed.

(f) Mailing of thank-you letters. As mentioned earlier, thank-you letters should be mailed within forty-eight hours. If the organization is large, this might pose a problem, but can be overcome through diligent human resource planning. Most of the time, bulk mail will be used. The Post Office gives a discount on 100 letters or more if a postage-paid stamp is pre-printed on the envelope. A new system of grading an organization's lists has recently been introduced by the Post Office when 1000 letters (or more) are despatched at one time.

9.3 DONOR ADMINISTRATION

The preparation, maintenance and control of donor lists are essential and must be done on a daily basis. This may be a shared duty, but the principal responsibility should, as was said earlier, rest with one individual who would probably also be responsible for thanking the donor. In the capturing of donations, many computer programmes also give the person doing the input the possibility to make corrections on the database or put in new information such as a change of address, bank details, new telephone numbers or ID numbers.

The organization should have at least two files: one that handles all the possible donors (prospects), which might could include interested friends, people that attended a function

or people who want to receive the newsletter of the organization but have not yet made a donation. These people should be coded in order to establish where the names originate. This list will be used for limited donor acquisition mailings, and are "hot lists", because the prospects have already heard of the organization.

As soon as a prospect makes a donation and becomes a donor the person's name is moved to a donor file. This can be as easy as changing the type of donor from an "F" (function) to a "I" (individual donor). This file consists of individuals, corporates, trusts and other that support the organization. Each type of donor should have a unique reference. For example T=Trust, C=Corporate and I=Individual donor.

The following information is the minimum information that should be kept in relation to each individual donor:

* Title

* Initials

* Surname

* Language

* ID number (which can be used to determine the birthdate and age of the donor)

* Telephone numbers for work and home

* Origin (in other words, where did the organization get this donor?)

* Postal address

* Street address

* Bank name

* Account number

* Branch number

* Last action date (the date of the last donation. This information should automatically be generated by the computer when the donation is captured)

* Category of the donor (in order of the size of gifts received; for example, 1=R1-R49 and 2=R50-R99. Categorizing donors by size of gift helps to identify donors who will be able to assist with, for example, capital expenditures)

* Donation history (as far back as possible, as well as the thank-you letters mailed to the donor, which helps to prevent mailing a thank-you letter twice to a specific donor)

* A field where general information of the donor is kept.

* A field which indicates whether the donor's entry should be deleted or not. (A donor should not simply be deleted with the first return of a letter, unless it is indicated that the donor has died or has moved. Even when a donor is deleted from the active donor list, details should be placed in a separate file because donors often keep the organization's details and send a donation at a later stage)

If this happens in the same year the donor has been deleted the specific donor file can be recalled from the deleted file. In the researcher's organization a donor is only completely deleted from the database after a year. It must be remembered that the organization has already spent a considerable sum on the donor.

Most of this type of information should also be included when managing corporates and trusts. ID numbers will not be kept but other information, such as the contact person or persons, important dates such as when proposals should be made and when the next contact should be made, must be included. Any other relevant information can be stored under "general".

The input screen of each type of donor will differ. The important thing to remember however is that the organization should decide what it wants. The organization will grow, and new needs will arise. The system should be flexible enough to grow with the organization.

9.4 EVALUATION OF A FUNDRAISING PROGRAMME

Every organization uses different ways to evaluate its fundraising programme. It is nevertheless important to evaluate the programme in order to ascertain whether the programme is still on track. All this has one over-riding purpose: to release as much of the money that has been raised to deal with the actual reason why the organization exists; that is, to fill a need in society. It also makes forward planning and forecasting of income and costs more accurate, and the organization will be in a position to know what works and what does not.

The following evaluations are important:

* Financial audits of projects and programmes

* Measuring the success of various goals set for projects in order to report back to donors

* Measuring whether the programme is making a difference

* The annual audited statements of the organization.

*Information required annually or quarterly (depending on the organization)

* Programme expenditures against fundraising income and fundraising costs:

* Product contributions: How much does every product (method of fundraising) in the fundraising mix contribute to the total? An example of a table is the following:

PRODUCT CONTRIBUTIONS:

	INCOME	TOTAL COST	COST/INCOME	NETT CONTRIBUTION
PRODUCT 1				
PRODUCT 2				
PRODUCT 3				

* Together with the above a review can be made of nett product contributions towards the total contributions over a number of years.

	1991	%	1992	%	1993	%
PRODUCT 1						
PRODUCT 2						
PRODUCT 3						

* The average number and value of donations. This evaluation shows trends, which may develop within specific fundraising products

* Donation value range. This tells the organization which categories (donor size) are bringing in the most funds.

* Active donors and prospective donors. Because donors die, move or just stop giving it is important to keep track of the how many donors are lost annually in order to calculate how many new donors are needed to keep replacing them.

* Product income against direct cost.

* <u>Information needed on a monthly basis</u>

It is important to keep track of trends on a monthly basis in order for the organization to be able to rectify problems as soon as they arise.

* Income and costs against the budget.

* Average number of donations against the budget. This also monitors trends and indicate what time of year is best to ask.

* Average donation size against budget.

* Active donors by region. Every organization has "strongholds" in certain regions which can be used to the benefit of the organization.

* Appeal mailing response:

	MAIL DATE	% RESPONSE	INCOME	COST/DONOR	COST/INCOME
MAIL A					
MAIL B					
MAIL C					

* Capital campaign progress or any other campaign. This must give the projected income and expenditure against actual income and expenditure.

9.5 SYNOPSIS

It is argued in this chapter that, when donation and donor administration are properly planned, this is an effective means of lessening routine office procedures and directing efforts to activities that are effective in producing donations. To do this, the fundraiser needs to put in place procedures to handle records of donations on a daily basis, from the moment the mail is fetched from the Post Office to the sorting and opening of mail, processing of the donations and banking it, capturing donations in order to thank donors and finally printing a daily donation summary and balancing with the bank summary.

This chapter also stresses that donor administration involves the preparation, maintenance and control of the donor lists on a daily basis. Information such as title, initials, surname, language, ID number, telephone numbers, origin, postal and street address, bank particulars, last action date, the category of the donor, donation history and other general information is crucial.

Different evaluation methods are then discussed, including annual and quarterly interventions. This include programme expenditures against fundraising income, product contributions, nett product contributions towards total contributions over a number of years, the average number of donations and the average value of these donations, the donation value range, the monitoring of active donors and prospective donors and product income versus direct cost. Evaluations on a monthly basis include income and costs against the budget, the average number of donations versus the budget, the average donation size versus budget, active donors by region, appeal mailing response and capital campaign progress.

It is suggested that, when procedures are in place the fundraiser is placed in a position where he or she can spend time on planning and control.

10: RESEARCH METHODOLOGY, EMPIRICAL ANALYSIS AND RESULTS

10.1 INTRODUCTION

Negative criticism is sometimes voiced concerning the professionalism of Christian organizations' fundraising efforts. The aim of this chapter is to highlight implications of the findings of the statistical analysis for Christian organizations and the fundraising done within their organizations. If problem areas are highlighted these organizations can deal with it and improve their professionalism - and thereby their successes. The practical use emanating from the analyses provided here is based in the theory expanded on in earlier chapters.

The statistical hypotheses are as follows:

$H1_0$ Christian organizations exhibit the same professional conduct as non-Christian organizations during fundraising efforts

$H2_0$ There is no difference between the professionalism in fundraising between organizations that do not directly ask for funds as apposed to those that ask directly.

10.2 RESEARCH METHODOLOGY

Research methodology discusses the universum, sample design, questionnaire design, the administration and techniques used to process results and testing of the hypotheses.

10.2.1 Universum

The universum consisted of all the Christian organizations in South Africa doing missionary work. The *Christian Handbook* (Froise, 1992) was used for several reasons. Firstly, it is at the moment, one of the most comprehensive lists available in South Africa on this subject. Secondly, the organizations are divided into

groupings such as missionary and welfare. Thirdly, details are given on the organizations themselves, which greatly facilitated choosing the list of organizations.

10.2.2 Sample

By using the groupings within the *Christian Handbook* (Froise, 1992), all the organizations indicating that they were missionary organizations were chosen. In the process, 270 organizations were identified and the questionnaire (together with a covering letter from the promoter and a personalized letter from the researcher) were mailed (Annexure 1). Respondents were asked to fill out the questionnaire and return it in the business reply envelope supplied. An incentive of R200, 00 for the first questionnaire received back was also included in the researcher's letter.

10.2.3 Questionnaire design

A sample questionnaire was designed after which it was discussed with other fundraisers in the field. Questions were changed, added and deleted until those involved were satisfied. The questionnaire was mailed to Christian, evangelical/missionary organizations and was to gather information on the following topics: Denominational affiliation, type of organization, theology of the organization, planning done within the organization, methods of financing (general), methods of financing (specific), administration, financial reporting and conclusions.

Denominational affiliation: This section was geared to split the organizations into two groupings - those that are para-church organizations and those, which are church-related organizations.

Type of organization: Although organizations chosen were said to be evangelical the researcher wanted to verify that they are also involved in other fields.

The theology of the organization: The theology played an important role in the analysis of the questionnaire. The person answering the question had four

possibilities

(a)   The organization was a faith mission and never directly asked for funds, but believed God will provide

(b)   The organization prayed for funds and informed people about the work being done and the needs of the organization.

(c)   The organization prayed for funds, but also directly asked for financial support.

(d)   Other

These possibilities were then divided into two categories: Those organizations who do not directly ask for funds (a and b)(non-askers) and those who directly ask for funds (c)(askers).

Planning done within the organization: This section elicited information concerning the mission statement, the board of trustees, strategic planning, and the fundraising, administrative and operational budgets.

Methods of financing (general and specific): Methods of financing were probed to give an overview of the fundraising being done within the organizations and how successful those methods were in raising funds.

Administration: This section covered the number of staff, how staff are remunerated and how donor and donation administration is undertaken.

Financial reporting: This section answered questions on the financial reporting of the organization.

Personal rating: Finally fundraisers were asked to rate their organisation's administrative system, operational activities and fundraising attempts.

10.2.4 Processing of questionnaire and data

There were 270 questionnaires mailed of which 18 nixes (return to sender) and 94

questionnaires were returned. The response rate was 34,81. The mail returned was opened, the completed questionnaires were numbered and then processed with the help of Excel, a part of MS Office family. Some respondents omitted some of the questions. Possible reasons why not all the questions were answered are the following:

a)   The question did not relate to the organization

b)   The respondent did not understand the question

c)   The respondent did not know the answer.

Percentages were calculated on the number of respondents to the total number of organizations that answered the question and not to the questionnaire.

10.3 RESULTS OF EMPIRICAL ANALYSIS

10.3.1 Denominational affiliation of organizations

This question as shown in Table 10.1 established the relationship of organizations with different church denominations.

Table 10.1 Denominational affiliation of organizations

*Q1	Para-Church	Church-Related	Other	Total
Askers	**26**	**27**	**2**	**55**
*Column %	49.1%	77.1%	33.3%	
*Row %	47.3%	49.1%	3.6%	
Non-Askers	**27**	**8**	**2**	**37**
Column %	50.9%	22.9%	33.3%	
Row %	73.0%	21.6%	5.4%	
Other	**0**	**0**	**2**	**2**
Column %	0.0%	0.0%	33.3%	
Row %	0.0%	0.0%	100.0%	
All Groups	**53**	**35**	**6**	**94**
Total %	56.4%	37.2%	6.4%	100

*The columns give the percentages of the askers and non-askers in terms of the total (all groups) in the different categories (example 26/53x100=49.1%). The rows give the percentages of the askers and non-askers separately (example 26/55x100=47,3%). This is the case in all the questions.

This Table shows that 47,3% of the askers were para-church organizations and 49,1% church related organizations, while of the non-askers on the other hand 73% were para-church organizations and only 21,6% church related. In total 56,4% were para-church organizations and only 37,2% church-related.

The church-related organizations represented 18 different churches. As can be seen, those that indicated that they were church related, 6 were related to the Dutch Reformed church, 4 to the Baptist and AFM churches and 2 to the Full Gospel and Methodist churches. The rest of the denominations were made up with

one organization each.

Amongst the askers there is not much difference between the para-church and church-related organizations but with the non-askers more organizations are para-church organizations. In total there are more para-church organizations than church-related organizations in this survey.

10.3.2 Type of organization

There were 94 questionnaires returned; 59 indicated that they were only evangelical/missionary orientated, 16 said they were also involved in education and 36 indicated they were involved in welfare as well.

Although all the organizations to which the questionnaires were sent indicated that they were evangelical/missionary organizations this question shows that most organizations in their missionary capacity are also involved in welfare and education as part of their work.

10.3.3 Theology of the organization

This question was used to split the main (Total) questionnaire further as shown in Table 10.2. The aim was to determine the difference in fundraising practices and professionalism between the askers (c) and non-askers (a) and (b).

Table 10.2 Theology of the organization(their philosophy on fundraising)

*Q4	Theology of organization	
	Respondents	Total
Askers	**54**	**54**
Column %	58.1%	
Non-Askers	**35**	**35**
Column %	37.6%	
Other	**4**	**4**
Column %	4.3%	
All Groups	**93**	**93**
Total %	100%	100

* 1 respondent did not answer the question

This Table shows that 93 answered the question, 54 indicated that they were askers and 35 that they were non-askers.

10.3.4 Planning done within the organization

This section covered questions on the mission statement of the organization, the board of trustees, strategic planning and budgeting.

a)   Mission statement

The question as referred to by Table 10.3 established whether or not organizations had mission statements.

Table 10.3 Whether or not organizations have mission statements

*Q5	Mission Statement			
	Yes	No	Other	Total
Askers	50	3	0	53
Column %	61.7%	50.0%	0.0%	
Row %	94.3%	5.7%	0.0%	
Non-Askers	31	3	0	34
Column %	38.3%	50.0%	0.0%	
Row %	91.2%	8.8%	0.0%	
Other	0	0	4	4
Column %	0.0%	0.0%	100.0%	
Row %	0.0%	0.0%	100.0%	
All Groups	81	6	4	91
Total %	89.0%	6.6%	4.4%	100

* 3 respondents did not answer the question

The percentages of organizations that did have mission statements ("yes") were for the askers 94,3% and non-askers 91,2%. In total 89% indicated that they did have a mission statement.

The following question on the mission statement as a communication tool indicated that of the non-askers only 42,9% communicated their mission statement to donors while 61,1% of the askers used it effectively as a communication tool.

More than 90% of the askers and non-askers have mission statements. Practical experience has shown that the overall the response of 89% is acceptable. What is concerning is that in both cases the mission statement is not used as an effective tool in the organization

b)   Active board members

Active board members are important to the success of the organization.

Table 10.4 How active board members are in organizations

*Q7	Exceptionally	Satisfactorily	Moderately	Inadequately	Poorly	Other	Total
Askers	3	13	17	10	9	0	52
Column %	60.0%	76.5%	70.8%	55.6%	47.4%	0.0%	
Row %	5.8%	25.0%	32.7%	19.2%	17.3%	0.0%	
Non-Askers	2	4	7	8	10	0	31
Column %	40.0%	23.5%	29.2%	44.4%	52.6%	0.0%	
Row %	6.5%	12.9%	22.6%	25.8%	32.2%	0.0%	
Other	0	0	0	0	0	2	2
Column %	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	
Row %	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	
All Groups	5	17	24	18	19	2	85
Total %	5.8%	20.0%	28.2%	21.2%	22.4%	2.4%	100

* 9 respondents did not answer the question

As can be seen 69,2% askers and 80,6% of the non-askers performed from moderately to poorly. In total 71,8% performed from moderately too poorly.

It would seem from the results that the board of trustees is a problem for fundraisers and staff. In both cases the board of trustees do not perform well. Personal experience has shown that the categories "satisfactory" and even "exceptionally" should perhaps be the norm.

208

c)   Number of board members or trustees

It is important to have enough trustees to do the work required but also not to overload the board with numbers as is shown in Table 10.5.

Table 10. 5 Number of trustees serving on the boards of organizations

*Q8	Number of Trustees				
	1-3	4-6	7-9	9+	Total
Askers	2	10	23	19	54
Column %	25.0%	40.0%	74.2%	67.8%	
Row %	3.7%	18.5%	42.6%	35.2%	
Non-Askers	6	13	7	8	34
Column %	75.0%	52.0%	22.6%	28.6%	
Row %	17.6%	38.3%	20.6%	23.5%	
Other	0	2	1	1	4
Column %	0.0%	8.0%	3.2%	3.6%	
Row %	0.0%	50.0%	25.0%	25.0%	
All Groups	8	25	31	28	92
Total %	8.7%	27.2%	33.7%	30.4%	100

* 2 respondents did not answer this question.

The askers average between 7 and 9 trustees on the board while the non-askers averages between 4 and 6 trustees.

The total suggests that the average lie between 7-9 trustees. Practical experience has shown that to be a good sized board.

d) Trustees that are businessmen

Table 10.6 indicates the organizations' access to business people.

Table 10.6 The number of businessmen that serve as trustees

*Q9	Businessmen as Trustees							
	0	1	2	3	4	5	6	Total
Askers	10	6	7	7	8	5	5	48
Column %	55.6%	46.2%	41.2%	58.3%	100.0%	100.0%	62.5%	
Row %	20.8%	12.5%	14.6%	14.6%	16.7%	10.4%	10.4%	
Non-Askers	7	6	10	4	0	0	3	30
Column %	38.8%	46.2%	58.8%	33.3%	0.0%	0.0%	37.5%	
Row %	23.3%	20.0%	33.3%	13.3%	0.0%	0.0%	10.0%	
Other	1	1	0	1	0	0	0	3
Column %	5.6%	7.6%	0.0%	8.3%	0.0%	0.0%	0.0%	
Row %	33.3%	33.3%	0.0%	33.3%	0.0%	0.0%	0.0%	
All Groups	18	13	17	12	8	5	8	81
Total %	22.2%	16.0%	21.0%	14.8%	9.9%	6.2%	9.9%	100

* 13 respondents did not answer the question

There is a good spread of businessmen on the boards, but it is concerning to note that 13 respondents did not answer the question and 20,8% of askers and 23,3% of non-askers did not have any businessmen on the boards.

d)   Strategic planning and the period of planning for fundraising

This topic was discussed at length in chapter 3 and came to the conclusion that strategic planning was vital for the success of the organization.

On the question of doing strategic planning, 4 respondents did not answer the question. 29,6% of the askers and 62,9% of the non-askers indicated that they did not do strategic planning of any kind.

The percentages for the askers as well the non-askers are far too high, although the askers do more planning than the non-askers.

Table 10.7 The strategic planning period of organizations

Q11	Scope of planning				
	1yr(a)	2-5yrs(b)	5+yrs(c)	(a,b,c)	Total
Askers	13	16	2	6	37
Column %	59.1%	94.1%	100.0%	85.7%	
Row %	35.1%	43.2%	5.4%	16.3%	
Non-Askers	8	1	0	1	10
Column %	36.4%	5.9%	0.0%	14.3%	
Row %	80.0%	10.0%	0.0%	10.0%	
Other	1	0	0	0	1
Column %	4.5%	0.0%	0.0%	0.0%	
Row %	100.0%	0.0%	0.0%	0.0%	
All Groups	22	17	2	7	48
Total %	45.8%	35.4%	4.2%	14.6%	100

This Table shows that of the askers that did planning and answered the question, 78,3% did planning for between 1 and 5 years and 16,3% from 1 year to more than 5 years. The non-askers (90%) did planning for between 1-5 years and 10% for 1 to more than 5 years. In total 81,2% did planning for between 1 and 5 years.

Although planning is done through the whole spectrum it is concerning to note that both the askers and non-askers concentrate more on short-term planning. It is clear that 80% of the non-askers 80% do one year planning which is unacceptable. Practical experience has shown that this is the case in most Christian organizations. To be successful long-term planning should also be done.

e)   Fundraising expenditure in budgets

There were 6 respondents that did not answer the question. The askers (37%) and non-askers (54,3%) answered that they did not have a budget for fundraising. In total 47,9% indicated that they had a budget for fundraising expenditure while 45,7% indicated not to have a budget.

This question shows that 37% of the askers do not have a fundraising budget. This

is unacceptable. Fundraising can not be done successfully if it is not planned and budgeted for. The percentage of 54% for the non-askers is also high but this can be related to the fact that funds are not specifically asked for.

f) Annual budgets for administrative and operational needs.

In many organizations that ask for funds the operational side is satisfactory because it is budgeted for as is shown in Table 10.8.

Table 10.8 Annual budget for administrative and operational needs

*Q13	Annual Budget		
	Yes	No	Total
Askers	49	4	53
Column %	66.2%	30.8%	
Row %	92.5%	7.5%	
Non-Askers	22	8	30
Column %	29.7%	61.5%	
Row %	73.3%	26.7%	
Other	3	1	4
Column %	4.1%	7.7%	
Row %	75.0%	25.0%	
All Groups	74	13	87
Total %	85.1%	14.9%	100

* 7 respondents did not answer the question

As can be seen, 92,5% of the askers indicated that a budget was developed for that purpose. The non-askers indicated that 73,3% did develop budgets but 26,7% did not. In total 85,1% indicated yes and 14,9% no. This confirms practical experiences that more time and effort is spent on administrative and operational needs than on fundraising needs.

10.3.5 General methods of financing

This section includes the following: how fundraising is done, reactions of donors when asked for funds and the fundraising programme of the organization.

a) How fundraising is done.

This question determines if professional help is used at all in the fundraising process.

Table 10.9 How fundraising is done within organizations

*Q14	Fundraising done		
	In-house	Assisted by consultants	Total
Askers	40	13	53
Column %	58.0%	76.5%	
Row %	75.5%	24.5%	
Non-Askers	25	4	29
Column %	36.2%	23.5%	
Row %	86.2%	13.8%	
Other	4	0	4
Column %	5.8%	0.0%	
Row %	100.0%	0.0%	
All Groups	69	17	86
Total %	80.2%	19.8%	100

* 8 respondents did not answer the question.

As Table 10.9 indicates, the majority of organizations do their fundraising in-house (Askers: 75,5% and non-askers 86,2%). In total 80,2% indicated that fundraising was done in-house.

Most organizations tend to try and do it themselves in order to save money. This can lead to disaster if the organization does not know how to do it. To avoid this problem consultants can be used on a part-time basis, which is the case with 24,5% of the askers.

b) Reaction of donors

Knowing what to ask donors can help the organization achieve the maximum revenue with the minimum output.

Table 10.10a Reaction of donors when asking funds for specific projects

*Q15a	Specific Projects				
	Exceptional	Good	Average	Poorly	Total
Askers	6	36	9	2	53
Column %	66.7%	66.7%	56.3%	40.0%	
Row %	11.3%	67.9%	17.0%	3.8%	
Non-Askers	1	17	6	3	27
Column %	11.1%	31.5%	37.5%	60.0%	
Row %	3.7%	63.0%	22.2%	11.1%	
Other	2	1	1	0	4
Column %	22.2%	1.8%	6.2%	0.0%	
Row %	50.0%	25.0%	25.0%	0.0%	
All Groups	9	54	16	5	84
Total %	10.7%	64.3%	19.0%	6.0%	100

* 10 respondents did not answer the question.

Table 10.10b Reaction of donors when asking funds for operational costs

*Q15b	Operational Costs				
	Exceptional	Good	Average	Poorly	Total
Askers	0	12	14	23	49
Column %	0.0%	75.0%	63.6%	67.6%	
Row %	0.0%	24.5%	28.6%	46.9%	
Non-Askers	0	4	7	11	22
Column %	0.0%	25.0%	31.8%	32.4%	
Row %	0.0%	18.2%	31.8%	50.0%	
Other	1	0	1	0	2
Column %	100.0%	0.0%	4.6%	0.0%	
Row %	50.0%	0.0%	50.0%	0.0%	
All Groups	1	16	22	34	73
Total %	1.4%	21.9%	30.1%	46.6%	100

*11 respondents did not answer the question.

Table 10.10c Reaction of donors when asking funds for general administration

*Q15c	General Administration				
	Exceptional	Good	Average	Poorly	Total
Askers	0	2	17	26	45
Column %	0.0%	66.7%	60.7%	74.3%	
Row %	0.0%	4.4%	37.8%	57.8%	
Non-Askers	0	1	10	9	20
Column %	0.0%	33.3%	35.7%	25.7%	
Row %	0.0%	5.0%	50.0%	45.0%	
Other	1	0	1	0	2
Column %	100.0%	0.0%	3.6%	0.0%	
Row %	50.0%	0.0%	50.0%	0.0%	
All Groups	1	3	28	35	67
Total %	1.5%	4.5%	41.8%	52.2%	100

*27 respondents did not answer the question.

Table 10.10d Reaction of donors when asking funds for reserves

Q15d	Reserves				
	Exceptional	Good	Average	Poorly	Total
Askers	0	1	2	36	39
Column %	0.0%	50.0%	33.3%	73.5%	
Row %	0.0%	2.6%	5.1%	92.3%	
Non-Askers	0	1	4	12	17
Column %	0.0%	50.0%	66.7%	24.5%	
Row %	0.0%	5.9%	23.5%	70.6%	
Other	0	0	0	1	1
Column %	0.0%	0.0%	0.0%	2.0%	
Row %	0.0%	0.0%	0.0%	100.0%	
All Groups	0	2	6	49	57
Total %	0.0%	3.5%	10.5%	86.0%	100

37 respondents did not answer the question

Table 10.10e Reaction of donors when asking funds for unspecified purposes

*Q15e	Unspecified Purposes				
	Exceptional	Good	Average	Poorly	Total
Askers	0	2	10	29	41
Column %	0.0%	40.0%	55.6%	70.7%	
Row %	0.0%	4.9%	24.4%	70.7%	
Non-Askers	0	3	8	10	21
Column %	0.0%	60.0%	44.4%	24.4%	
Row %	0.0%	14.3%	38.1%	47.6%	
Other	0	0	0	2	2
Column %	0.0%	0.0%	0.0%	4.9%	
Row %	0.0%	0.0%	0.0%	100.0%	
All Groups	0	5	18	41	64
Total %	0.0%	7.8%	28.1%	64.1%	100

* 30 respondents did not answer the question

According to this Table 67,9% of askers and 63% of the non-askers answered "good", indicating that asking for specific projects raised the most income. In total 64,3% indicated "good". All the other reactions vary between average and poorly.

When looking at Table 10.10(a)-10.10(e) it is clear that asking donations for specific projects is the best way to raise funds (a). The high non-response to some of these questions probably indicate that the organizations did not ask for these funds.

c)   Fundraising programme.

The diversity of the organization's fundraising is important if the organization is to survive.

Table 10.11 The diversity of the organization's fundraising programme

*Q16	Fundraising Programme						
	Bequest Programme	Grant Solicitation	Annual collection days	Direct mail Programme	Special events	Other	Total
Askers	20	28	13	33	22	18	134
Column %	76.9%	84.8%	81.3%	80.5%	78.6%	47.4%	
Row %	14.9%	20.9%	9.7%	24.6%	16.4%	13.5%	
Non-Askers	6	4	3	8	5	18	44
Column %	23.1%	12.2%	18.7%	19.5%	17.9%	47.4%	
Row %	13.6%	9.1%	6.8%	18.2%	11.4%	40.9%	
Other	0	1	0	0	1	2	4
Column %	0.0%	3.0%	0.0%	0.0%	3.5%	5.2%	
Row %	0.0%	25.0%	0.0%	0.0%	25.0%	50.0%	
All Groups	26	33	16	41	28	38	182
Total %	14.3%	18.1%	8.8%	22.5%	15.4%	20.9%	100

Table 10.11 shows that there is a good mix of fundraising methods within both types of organizations. Percentage-wise (24,6%) of the askers do have a direct mailing programme, followed by grant soliciting (20,9%). While with the non-askers 40,9% indicated other followed by a direct mail programme (18,2%). It is the author's opinion that the 40,9% indicated as other includes special events. With this question the ignorance of some of the organizations were shown – especially with the non-askers. Although special events were one of the possibilities, they still indicated other and then specified it – showing it to be a special event such as a golf day.

10.3.6 Specific methods of financing

This section includes questions on donor acquisition and donor renewal mailings, newsletters, special events, number of donors and the annual fundraising income of the organizations.

a)   Donor acquisition.

In order for the organization's donor-base to grow, donor acquisition must be done one a regular basis.

Table 10.12 Different methods of doing donor acquisition

Q17	Donor Acquisition Methods							
	Letter not personalised	Letter not personalised and return envelope	Personalised letter, slip and return envelope	Face to face	Telephone	Combination of all	Other	Total
Askers	1	4	27	30	11	8	9	90
Column %	14.3%	66.7%	81.8%	62.5%	78.6%	80.0%	45.0%	
Row %	1.1%	4.4%	30.0%	33.3%	12.2%	8.9%	10.1%	
Non-Askers	5	2	6	17	3	2	10	45
Column %	71.4%	33.3%	18.2%	35.4%	21.4%	20.0%	50.0%	
Row %	11.1%	4.4%	13.3%	37.8%	6.7%	4.4%	22.3%	
Other	1	0	0	1	0	0	1	3
Column %	14.3%	0.0%	0.0%	2.1%	0.0%	0.0%	5.0%	
Row %	33.3%	0.0%	0.0%	33.3%	0.0%	0.0%	33.3%	
All Groups	7	6	33	48	14	10	20	138
Total %	5.2%	4.3%	23.9%	34.8%	10.1%	7.2%	14.5%	100

Table 10.12 shows that in both instances face-to-face solicitation is the highest (askers – 33,3% non-askers – 37,8%). In ranking donor acquisition methods face-to-face solicitation heads the list, although it is time-consuming and expensive. The second-highest percentage is the personal letter, slip and return envelope (askers-30%, non-askers-13, 3%). The lower percentage of the non-askers fits because this is not the medium usually used.

b)   Frequency of donor acquisition mailings

Donor acquisition must be done on a regular basis to be successful.

Table 10.13 Frequency of donor acquisition mailings on an annual basis

*Q18	Number of mailshots annually							
	0	1	2	3	4	5	6	Total
Askers	4	11	12	2	3	2	4	38
Column %	80.0%	78.6%	80.0%	40.0%	42.9%	100.0%	66.7%	
Row %	10.5%	28.9%	31.6%	5.3%	7.9%	5.3%	10.5%	
Non-Askers	0	2	3	3	4	0	2	14
Column %	0.0%	14.3%	20.0%	60.0%	57.1%	0.0%	33.3%	
Row %	0.0%	14.3%	21.4%	21.4%	28.6%	0.0%	14.3%	
Other	1	1	0	0	0	0	0	2
Column %	20.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Row %	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
All Groups	5	14	15	5	7	2	6	54
Total %	9.3%	25.9%	27.8%	9.3%	13.0%	3.7%	11.0%	100

* 40 respondents did not answer the question.

The askers' highest percentages are between 1 and 2 times a year – a total of 60,5%. With the non-askers the percentage is the highest on 4 mailings a year (28,6%),

The frequency of donor acquisition mailings is better with the non-askers than the askers. This would indicate that the non-askers communicate more often with possible donors than the askers. The frequency of mailings for the askers should be higher if the donorbase of the organization is to grow. The problem lies in the fact that 10,5% do not do any mailings at all.

c)   Potential donors contacted face-to-face

Soliciting new donors can also be done face to face – although it is expensive to do.

Table 10.14 Number of potential donors contacted face-to-face

*Q19	Number of Face to Face contacts/month				
	1-25	26-75	76-100	100+	Total
Askers	12	3	1	6	22
Column %	66.7%	75.0%	100.0%	75.0%	
Row %	54.5%	13.6%	4.5%	27.4%	
Non-Askers	6	1	0	2	9
Column %	33.3%	25.0%	0.0%	25.0%	
Row %	66.7%	11.1%	0.0%	22.2%	
All Groups	18	4	1	8	31
Total %	58.1%	12.9%	3.2%	25.8%	100

* 63 respondents did not answer the question.

The askers indicated that 12 organizations contacted between 1-25 persons on a monthly basis and 6 indicated they contact 100+ a month (Table 10.14). The non-askers, which indicated that they do more face-to-face solicitation, indicated that 6 organizations contacted 1-25 person a month and two indicated 100+ persons a month.

d)   Potential donors contacted by telephone

Using the telephone is another method to acquire new donors.

Table 10.15 Number of potential donors contacted by telephone

*Q20	Number of Telephone contacts/month				
	1-25	26-75	76-100	100+	Total
Askers	7	2	3	4	16
Column %	70.0%	66.7%	100.0%	100.0%	
Row %	43.8%	12.5%	18.7%	25.0%	
Non-Askers	3	1	0	0	4
Column %	30.0%	33.3%	0.0%	0.0%	
Row %	75.0%	25.0%	0.0%	0.0%	
All Groups	10	3	3	4	20
Total %	50.0%	15.0%	15.0%	20.0%	100

* 74 respondents did not answer the question

There were 20 that did answer the question. Both the askers and non-askers indicated that they contact between 1-25 persons on a monthly basis. The total was 50%.

e)   Number of donor renewal mailings.

Table 10.16 Number of donor renewal mailings done annually

*Q21	Number of Donor renewal Mailings a year								
	0	1	2	3	4	5	6	7	Total
Askers	0	12	6	6	8	0	1	5	38
Column %	0.0%	75.0%	66.7%	75.0%	80.0%	0.0%	50.0%	100.0%	
Row %	0.0%	31.6%	15.8%	15.8%	21.1%	0.0%	2.6%	13.1%	
Non-Askers	0	3	3	2	2	0	1	0	11
Column %	0.0%	18.8%	33.3%	25.0%	20.0%	0.0%	50.0%	0.0%	
Row %	0.0%	27.3%	27.3%	18.2%	18.2%	0.0%	9.0%	0.0%	
Other	1	1	0	0	0	0	0	0	2
Column %	100.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Row %	50.0%	50.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
All Groups	1	16	9	8	10	0	2	5	51
Total %	2.0%	31.4%	17.6%	15.7%	19.6%	0.0%	3.9%	9.8%	100

* 43 respondents did not answer the question.

In both instances the highest percentages lie between 1-3 mailing a year (askers-63,2%, non-askers – 72,8%). The total is 64,7%. Although the mailings lie between 1-3 per year, 1 mailing per year totals 31,4%. With one mailing a year an organization can not sustain its work.

f)   Personalization of correspondence.

As Table 10.17 shows the best way to correspond with donors is to personalize all correspondence.

Table 10.17 Personalization of correspondence to donors

*Q22	Personalized correspondence		
	Yes	No	Total
Askers	43	10	53
Column %	62.3%	71.4%	
Row %	81.1%	18.9%	
Non-Askers	25	4	29
Column %	36.2%	28.6%	
Row %	86.2%	13.8%	
Other	1	0	1
Column %	1.5%	0.0%	
Row %	100.0%	0.0%	
All Groups	69	14	83
Total %	83.1%	16.9%	100

* 11 respondents did not answer the question.

Both types of organizations indicated that they had a high percentage of personalized mail (askers – 81,1%, non-askers – 86,2%). However, 18,9% of the askers and 13,8% of the non-askers indicated that they did not personalize their mail.

Personalization is important if the organization is to build a relationship with its donors. The percentage of not personalizing correspondence should be smaller.

g)   Regular newsletters.

Newsletters are a way to communicate with donors and are therefore important for the organization.

Table 10.18 Regular newsletters received by donors

*Q23	Regular Newsletter		
	Yes	No	Total
Askers	**49**	**5**	**54**
Column %	61.3%	50.0%	
Row %	90.7%	9.3%	
Non-Askers	**29**	**3**	**32**
Column %	36.3%	30.0%	
Row %	90.6%	9.4%	
Other	**2**	**2**	**4**
Column %	2.4%	20.0%	
Row %	50.0%	50.0%	
All Groups	**80**	**10**	**90**
Total %	88.9%	11.1%	100

* 4 respondents did not answer the question.

Question 24 asked the number of newsletters that were mailed to donors annually. Most organizations indicated that they did between 3-5 mailings a year.

Question 23 (Table 10.18) and 24 indicated the use of newsletters in the organization. Both types of organizations make use of newsletters. Most organizations do between 3-5+ mailings a year (askers-66,6%, non-askers- 71,5%). Organizations that usually do not ask for funds rely heavily on newsletters to convey needs to their donors.

h) Success of special events in raising, donors, funds and publicity

Special events have a place in the fundraising mix and is important to raise awareness.

Table 10.19a: Success of special events in raising new donors

*Q26a	Success in raising New Donors					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	1	12	12	7	3	35
Column %	100.0%	75.0%	80.0%	58.3%	42.9%	
Row %	2.9%	34.3%	34.3%	20.0%	8.5%	
Non-Askers	0	4	3	5	3	15
Column %	0.0%	25.0%	20.0%	41.7%	42.9%	
Row %	0.0%	26.7%	20.0%	33.3%	20.0%	
Other	0	0	0	0	1	1
Column %	0.0%	0.0%	0.0%	0.0%	14.2%	
Row %	0.0%	0.0%	0.0%	0.0%	100.0%	
All Groups	1	16	15	12	7	51
Total %	2.0%	31.4%	29.4%	23.5%	13.7%	100

*43 respondents did not answer the question.

Table 10.19b Success of special events in raising funds

*Q26b	Success in raising Funds					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	2	11	18	3	1	35
Column %	66.7%	68.8%	90.0%	33.3%	33.3%	
Row %	5.7%	31.4%	51.4%	8.6%	2.9%	
Non-Askers	1	3	2	6	2	14
Column %	33.3%	18.8%	10.0%	66.7%	66.7%	
Row %	7.1%	21.4%	14.3%	42.9%	14.3%	
Other	0	2	0	0	0	2
Column %	0.0%	12.4%	0.0%	0.0%	0.0%	
Row %	0.0%	100.0%	0.0%	0.0%	0.0%	
All Groups	3	16	20	9	3	51
Total %	5.9%	31.4%	39.2%	17.6%	5.9%	100

* 43 respondents did not answer the question.

Table 10.19c Success of special events in raising publicity

*Q26c	Success in raising Publicity					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	3	13	14	4	1	35
Column %	100.0%	65.0%	63.6%	57.1%	50.0%	
Row %	8.6%	37.1%	40.0%	11.4%	2.9%	
Non-Askers	0	5	8	3	1	17
Column %	0.0%	25.0%	36.4%	42.9%	50.0%	
Row %	0.0%	29.4%	47.1%	17.6%	5.9%	
Other	0	2	0	0	0	2
Column %	0.0%	10.0%	0.0%	0.0%	0.0%	
Row %	0.0%	100.0%	0.0%	0.0%	0.0%	
All Groups	3	20	22	7	2	54
Total %	5.6%	37.0%	40.7%	13.0%	3.7%	100

* 40 respondents did not answer the question.

In the case of the askers in all three instances (a, b, c) the highest percentages lie between satisfactory and moderately. In the case of the non-askers the highest percentages lie between moderately and inadequately. Askers use this method more successfully than the non-askers.

i) Number of donors.

The number of donors might indicate how big the organization is and how successful it is in its fundraising efforts as shown in Table 10.20.

Table 10.20 Number of donors supporting the organization

*Q28	Number of Donors									
	0	1-250	251-500	501-750	751-1000	1001-2000	2001-3000	3001-6000	6000+	Total
Askers	2	20	6	0	0	4	1	6	6	45
Column %	50.0%	60.6%	50.0%	0.0%	0.0%	66.6%	33.3%	100%	100%	
Row %	4.4%	44.4%	13.3%	0.0%	0.0%	8.9%	2.2%	13.4%	13.4%	
Non-Askers	1	12	6	2	3	1	2	0	0	27
Column %	25.0%	36.4%	50.0%	100%	100%	16.7%	66.7%	0.0%	0.0%	
Row %	3.7%	44.4%	22.3%	7.4%	11.1%	3.7%	7.4%	0.0%	0.0%	
Other	1	1	0	0	0	1	0	0	0	3
Column %	25.0%	3.0%	0.0%	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	
Row %	33.3%	33.3%	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	
All Groups	4	33	12	2	3	6	3	6	6	75
Total %	5.3%	44.0%	16.0%	2.7%	4.0%	8.0%	4.0%	8.0%	8.0%	100

* 19 respondents did not answer the question.

With the askers 62,1% of the number of organization's donors lie between 0-500 while the non-askers' percentage is 70,4%. In total 65,3% lie between 0-500. Only 7,4% of the non-askers have more than 2000 donors while 29% of the askers have more than 2000 donors.

The non-askers donor bases are smaller than those of the askers, although both the askers and non-askers do not have large donor bases. The reasons could be two fold: a) the constituency of the organization is small or b) the fundraising is not on standard.

Annual fundraising income

This together with the number of donors will give an indication of the fundraising success of the organizations.

Table 10.21 Annual fundraising income generated by the organization

Q29	Annual Income									
	<R50 000	R50 001-R100 000	R100 001-R150 000	R150 001-R200 000	R200 001-R400 000	R400 001-R750 000	R750 001-R1 000 000	R1 000 001-R3 000 000	>R3 000 000	Total
Askers	9	10	3	4	4	4	4	12	2	52
Column %	42.9%	71.4%	27.3%	80.0%	57.1%	80.0%	80.0%	85.8%	66.7%	
Row %	17.3%	19.2%	5.8%	7.7%	7.7%	7.7%	7.7%	23.1%	3.8%	
Non-Askers	10	4	7	1	3	1	1	1	1	29
Column %	47.6%	28.6%	63.6%	20.0%	42.9%	20.0%	20.0%	7.1%	33.3%	
Row %	34.6%	13.8%	24.2%	3.4%	10.4%	3.4%	3.4%	3.4%	3.4%	
Other	2	0	1	0	0	0	0	1	0	4
Column %	9.5%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	
Row %	50.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%	25.0%	0.0%	
All Groups	21	14	11	5	7	5	5	14	3	85
Total %	24.7%	16.5%	12.9%	5.9%	8.2%	5.9%	5.9%	16.5%	3.5%	100

* 9 respondents did not answer the question.

The annual fundraising income is low for both the askers and non-askers,. The highest percentages for the askers and the non-askers lie between <R50000-150000. In the case of the askers it is 42,3% while for the non-askers it is 72,6%. The askers (12) indicated that they have an income between R1000 000 and R3000 000,00 per annum and in total (all groups) 54,1% range between <R50000 and R150 000,00.

The non-askers' income is very low considering that more than 70% of these

organizations have an income of R150 000 or less and in total more than 50% fall in the same category.

j) Percentage of total annual requirements covered through fundraising

Table 10.22 Percentage of total annual requirements covered through fundraising

*Q30	Percentage of Annual Requirements					
	0-25%	26-50%	51-75%	76-99%	100%	Total
Askers	11	11	1	5	11	39
Column %	50.0%	78.6%	25.0%	62.5%	68.8%	
Row %	28.2%	28.2%	2.6%	12.8%	28.2%	
Non-Askers	9	3	3	2	5	22
Column %	40.9%	21.4%	75.0%	25.0%	31.2%	
Row %	40.9%	13.6%	13.6%	9.2%	22.7%	
Other	2	0	0	1	0	3
Column %	9.1%	0.0%	0.0%	12.5%	0.0%	
Row %	66.7%	0.0%	0.0%	33.3%	0.0%	
All Groups	22	14	4	8	16	64
Total %	34.4%	21.9%	6.2%	12.5%	25.0%	100

*30 respondents did not answer the question.

Table 10.22 shows that in the case of the askers, only 28,2% of the total annual requirements are covered by fundraising, while 22,7% of non-askers' annual requirements are covered. In total only 25% of annual requirements are covered by fundraising.

The percentages in both cases are low. It is alarming that 56,4% of the askers and 54,5% of the non-askers cover only 50% or less of their annual requirements. This must give an indication of the professionalism in these organizations' fundraising efforts.

10.3.7 Administration

Under the heading administration questions are asked about staff numbers and remuneration and administrations systems.

a)   Full-time staff members employed

The question was asked to elicit an indication of the proportion of staff used in the different disciplines in the organization.

Table 10.23a Number of full-time staff members employed for administration

*Q31a	Full-time Staff members for Administration						
	0	1	2	3	4	5	Total
Askers	3	12	12	6	3	15	51
Column %	33.3%	52.2%	60.0%	75.0%	75.0%	71.4%	
Row %	5.9%	23.5%	23.5%	11.8%	5.9%	29.4%	
Non-Askers	4	10	8	2	1	5	30
Column %	44.4%	43.5%	40.0%	25.0%	25.0%	23.8%	
Row %	13.3%	33.3%	26.7%	6.7%	3.3%	16.7%	
Other	2	1	0	0	0	1	4
Column %	22.3%	4.3%	0.0%	0.0%	0.0%	4.8%	
Row %	50.0%	25.0%	0.0%	0.0%	0.0%	25.0%	
All Groups	9	23	20	8	4	21	85
Total %	10.6%	27.1%	23.5%	9.4%	4.7%	24.7%	100

* 9 respondents did not answer the question.

Table 10.23b Number of full-time staff members employed for fundraising

*Q31b	Full-time Staff members for Fundraising						
	0	1	2	3	4	5	Total
Askers	26	10	6	4	0	4	50
Column %	52.0%	90.9%	75.0%	80.0%	0.0%	80.0%	
Row %	52.0%	20.0%	12.0%	8.0%	0.0%	8.0%	
Non-Askers	21	1	2	1	1	1	27
Column %	42.0%	9.1%	25.0%	20.0%	100.0%	20.0%	
Row %	77.8%	3.7%	7.4%	3.7%	3.7%	3.7%	
Other	3	0	0	0	0	0	3
Column %	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Row %	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
All Groups	50	11	8	5	1	5	80
Total %	62.5%	13.8%	10.0%	6.2%	1.3%	6.2%	100

* 14 respondents did not answer the question.

Table 10.23c Number of full-time staff members employed operational activities

*Q31c	Full-time Staff members for Operational activities						
	0	1	2	3	4	5	Total
Askers	7	7	2	4	2	26	48
Column %	50.0%	70.0%	33.3%	80.0%	33.3%	76.5%	
Row %	14.6%	14.6%	4.2%	8.2%	4.2%	54.2%	
Non-Askers	4	3	4	1	4	8	24
Column %	28.6%	30.0%	66.7%	20.0%	66.7%	23.5%	
Row %	16.7%	12.5%	16.7%	4.1%	16.7%	33.3%	
Other	3	0	0	0	0	0	3
Column %	21.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
Row %	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
All Groups	14	10	6	5	6	34	75
Total %	18.7%	13.3%	8.0%	6.7%	8.0%	45.3%	100

* 19 respondents did not answer the question.

The highest percentages for fundraising staff in both cases lie between 0-1. (Askers – 72%, non-askers – 81,5%). The total for this section is 76,3%, which is unacceptably low.

b)   Remuneration of staff

The question indicated how staff was remunerated.

Table 10.24 Methods of remuneration of staff in the organization

*Q32	Remuneration						
	Salary	Commission	Personal support	Own donor recruitment	Combination	Other	Total
Askers	45	2	7	10	1	1	66
Column %	70.3%	66.7%	63.6%	58.8%	25.0%	20.0%	
Row %	68.2%	3.0%	10.6%	15.2%	1.5%	1.5%	
Non-Askers	16	1	4	7	3	3	34
Column %	25.0%	33.3%	36.4%	41.2%	75.0%	60.0%	
Row %	47.1%	2.9%	11.8%	20.6%	8.8%	8.8%	
Other	3	0	0	0	0	1	4
Column %	4.7%	0.0%	0.0%	0.0%	0.0%	20.0%	
Row %	75.0%	0.0%	0.0%	0.0%	0.0%	25.0%	
All Groups	64	3	11	17	4	5	104
Total %	61.5%	2.9%	10.6%	16.3%	3.8%	4.9%	100

* There are more than 94 in total because some organizations have a combination of more than one type of remuneration.

Most of the organizations pay their staff a salary (askers – 68,2%, non-askers – 47,1%) as shown in Table 10.24. Second on the list is own donor recruitment. This kind of remuneration is common within organizations that do not ask for funds. In both instances there are organizations that pay people on a commission basis which is not acceptable.

c)   System for donors' particulars and history

This question was to give an indication if there was a system in place to handle the donor base and other administration.

Table 10.25 Availability of systems to handle donors' particulars and history

*Q34	Donor' Particulars & History			
	Yes	No	Other	Total
Askers	46	8	0	54
Column %	62.2%	50.0%	0.0%	
Row %	85.2%	14.8%	0.0%	
Non-Askers	26	6	0	32
Column %	35.1%	37.5%	100.0%	
Row %	81.0%	18.7%	0.3%	
Other	2	2	0	4
Column %	2.7%	12.5%	0.0%	
Row %	50.0%	50.0%	0.0%	
All Groups	74	16	0	90
Total %	82.1%	17.8%	0.1%	100

* 4 respondents did not answer the question.

The askers and non-askers both indicated that they have a system in place (askers - 85,2%, non-askers – 81%), although 14,8% of the askers and 18,7% of the non-askers indicated that they do not have any system in place.

d)   Type of system used

Question 35 indicated the type of system in use in the organizations. Many of the organizations have computer facilities to handle donor administration although the non-askers' percentage is lower that the askers (askers- 64,8%, non-askers- 45,7%).

e)   Donation acknowledgement

The acknowledgement of donors are and important of the fundraising process.

Table 10.26 Methods used for donation acknowledgement

*Q36	Donation Acknowledgement					
	Receipt	Unpersonalized letter + receipt	Personalized letter + receipt	Not Acknowledged	Other	Total
Askers	1	2	50	0	1	54
Column %	33.3%	50.0%	61.0%	0.0%	100.0%	
Row %	1.9%	3.7%	92.5%	0.0%	1.9%	
Non-Askers	2	1	29	1	0	33
Column %	66.7%	25.0%	35.4%	100.0%	0.0%	
Row %	6.1%	3.0%	87.9%	3.0%	0.0%	
Other	0	1	3	0	0	4
Column %	0.0%	25.0%	3.6%	0.0%	0.0%	
Row %	0.0%	25.0%	75.0%	0.0%	0.0%	
All Groups	3	4	82	1	1	91
Total %	3.3%	4.4%	90.1%	1.1%	1.1%	100

* 3 respondents did not answer the question.

Table 10.26 shows that most of the donors are thanked by personalized letter and receipt (askers - 92,5%, non-askers - 87,9%). In total 90,1% are thanked in this way.

f)Timeframe for thanking donors

The timeframe in which the donor is thanked is important because it makes the donor feel special.

Question 37 indicated that 68,5% of the askers and 45,7% of the non-askers take

between 4-5 days to thank a donor. Only 5,5% of the askers and 8,6% of the non-askers take one day to thank their donors, which should be the norm.

g)   Contents (gift received and application) of thank you letter

The thank you letter should contain information on the gift received and the application of these funds.

Table 10.27 Contents (gift received and application) of thank you letters to donors

*Q38	Thank you letter - information		
	Yes	No	Total
Askers	**45**	**7**	**52**
Column %	64.3%	50.0%	
Row %	86.5%	13.5%	
Non-Askers	**22**	**6**	**28**
Column %	31.4%	42.9%	
Row %	78.6%	21.4%	
Other	**3**	**1**	**4**
Column %	4.3%	7.1%	
Row %	75.0%	25.0%	
Total %	83.3%	16.7%	100

* 10 respondents did not answer the question.

Of the askers 86,5% and 78,6% of the non-askers indicated that their thank you letters did contain information of the donation received. On the question of a different thank you letter each time the donor gives a donation 83,3% of the askers and 85,7% of the non-askers indicated "yes".

Questions 38 and 39 were asked to provide an indication of the contents of the thank-you letters. Most of the organizations report back to their donors (question38) and this differs each time the donor gives (question 39).

10.3.8 Financial reporting

This section included questions on financial statements, the auditing of those statements and what it is used for.

a)   Monthly financial statements

Table 10.28 Availability of monthly financial statements

*Q40	Monthly Statements		
	Yes	No	Total
Askers	45	9	54
Column %	60.0%	64.3%	
Row %	83.3%	16.7%	
Non-Askers	27	5	32
Column %	36.0%	35.7%	
Row %	84.4%	15.6%	
Other	3	0	3
Column %	4.0%	0.0%	
Row %	100.0%	0.0%	
All Groups	75	14	89
Total %	84.3%	15.7%	100

* 5 respondents did not answer the question.

The question indicates that 83,3% of the askers and 84,4% of the non-askers produce monthly financial statements. 16,7% of the askers and 15,6% of the non-askers do not produce monthly statements.

The percentage of more than 80% is an acceptable figure although it is concerning that there are still organizations that do not do monthly statements.

b)   What the monthly statements include

On the question of what monthly financial reports include (question 44) both the askers and non-askers indicated that the income and expenditure account is used the most (askers- 77,8%, non-askers- 65,7%).

The percentages of both are high although the askers are higher than that of the non-askers, indicating that the non-askers do not utilise these tools to their fullest advantage.

c)   Independent external auditor audit financial statements

Some organizations do not audit their statements, one of the basic elements to being professional and accountable.

Table 10.29 The use of independent external auditors to audit financial statements

*Q42	External Audit		
	Yes	No	Total
Askers	52	2	54
Column %	62.7%	25.0%	
Row %	96.3%	3.7%	
Non-Askers	27	6	33
Column %	32.5%	75.0%	
Row %	81.8%	18.2%	
Other	4	0	4
Column %	4.8%	0.0%	
Row %	100.0%	0.0%	
All Groups	83	8	91
Total %	91.2%	8.8%	100

* 3 respondents did not answer the question.

In both cases the majority of organizations have their statements audited by professional qualified external auditors (askers –96,3%, non-askers 81,8%).

d)   Statements used to evaluate against the budget figures

To have statements is not enough, they should also be utilized.

Table 10.30 Financial statements used to compare with the budget figures

*Q44	Evaluate Budget		
	Yes	No	Total
Askers	48	3	51
Column %	66.7%	20.0%	
Row %	94.1%	5.9%	
Non-Askers	20	12	32
Column %	27.8%	80.0%	
Row %	62.5%	37.5%	
Other	4	0	4
Column %	5.5%	0.0%	
Row %	100.0%	0.0%	
All Groups	72	15	87
Total %	82.8%	17.2%	100

* 7 respondents did not answer the question

The askers (94,1%) and the non-askers (62,5%) indicated that they compare financial statements with budget figures. The non-askers do not utilize this tool too its fullest extent.

10.3.9 Personal rating

After the fundraiser finished the questionnaire he or she was asked to rate their organization in terms of its administrative system, operational activities and fundraising attempts Table 10.30(a)-10.30(c).

Table 10.31a Statements used to evaluate against the budget figures

*Q46a	Success of Administrative System					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	4	27	19	0	3	53
Column %	50.0%	65.9%	73.1%	0.0%	37.5%	
Row %	7.5%	50.9%	35.8%	0.0%	5.8%	
Non-Askers	3	11	7	6	5	32
Column %	37.5%	26.8%	26.9%	100.0%	62.5%	
Row %	9.4%	34.4%	21.9%	18.8%	15.5%	
Other	1	3	0	0	0	4
Column %	12.5%	7.3%	0.0%	0.0%	0.0%	
Row %	25.0%	75.0%	0.0%	0.0%	0.0%	
All Groups	8	41	26	6	8	89
Total %	9.0%	46.1%	29.2%	6.7%	9.0%	100

*5 respondents did not answer the question.

Both the askers and non-askers indicate that the organizations are between satisfactory and moderately successful in their administrative systems (askers – 85,2%, non-askers -51,4%). Both lean towards satisfactory.

Table 10.31b The rate of success of the operational activities

*Q46b	Success of Operational Activities					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	4	32	13	3	1	53
Column %	50.0%	69.6%	54.2%	42.9%	33.3%	
Row %	7.5%	60.4%	24.5%	5.7%	1.9%	
Non-Askers	3	13	9	4	2	31
Column %	37.5%	28.3%	37.5%	57.1%	66.7%	
Row %	9.7%	41.9%	29.0%	12.9%	6.5%	
Other	1	1	2	0	0	4
Column %	12.5%	2.1%	8.3%	0.0%	0.0%	
Row %	25.0%	25.0%	50.0%	0.0%	0.0%	
All Groups	8	46	24	7	3	88
Total %	9.0%	52.3%	27.3%	8.0%	3.4%	100

* 6 respondents did not answer the question.

Both the askers and non-askers indicate that the organizations are between satisfactory and moderately successful in their operational systems (askers–83,4%, non-askers -62,8%). Both lean towards satisfactory.

Table 10.31c The rate of success of fundraising attempts

*Q46c	Success of Fundraising Attempts					
	Exceptional	Satisfactorily	Moderately	Inadequately	Poorly	Total
Askers	1	15	18	13	6	53
Column %	50.0%	71.4%	72.0%	72.2%	37.5%	
Row %	1.9%	28.3%	34.0%	24.5%	11.3%	
Non-Askers	1	5	5	5	10	26
Column %	50.0%	23.8%	20.0%	27.8%	62.5%	
Row %	3.8%	19.2%	19.2%	19.2%	38.6%	
Other	0	1	2	0	0	3
Column %	0.0%	4.8%	8.0%	0.0%	0.0%	
Row %	0.0%	33.3%	66.7%	0.0%	0.0%	
All Groups	2	21	25	18	16	82
Total %	2.4%	25.6%	30.5%	22.0%	19.5%	100

* 12 respondents did not answer the question.

The askers indicates that the organizations were between moderately and inadequately (58,5%) successful in their fundraising attempts. The non-askers indicated that the organizations were between inadequately and poorly (57,8%). The askers lean towards moderately and the non-askers towards poorly.

Questions 25, 27, 33 and 45 were not used because respondents contradicted themselves .

10.4 SYNOPSIS

This chapter looks at the statistical analysis of the questionnaire that was mailed to Christian organizations. It discusses the questionnaire, indicates what it consists of, analysis the universum, which provides information on all the possible organizations the questionnaire, could have been mailed to. The sample used discusses the actual mailing list compiled for the mailing. Finally the results of the empirical analysis are discussed.

11 SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

11.1 INTRODUCTION

This chapter is divided into three sections. The first section entails a short summary of the study. The second section discusses the conclusions drawn from this study, with specific reference to the empirical study. Section three includes a number of recommendations made pertaining to the contribution this study can make.

11.2 SUMMARY

The primary objective of this study was to provide a practical insight in Christian fundraising in South Africa and how professional it was.

Chapter one discussed the background to Christian fundraising starting with the Old Testament stating that everything belongs to God, and man is only the steward of God's property. Ways of tithing or giving in the Old Testament, through to the New Testament up to the Reformation in Europe was also discussed.

The history of Christian fundraising in South Africa followed, discussing the early years when charity was a community affair, the establishment of a Department of Welfare in 1937 and the different Welfare Acts implemented of which the latest was promulgated in 1997: The Nonprofit Organisations Bill 1997.

The chapter ended by discussing the fundraising cycle, which can be used to make Christian organizations professional in their efforts to raise funds.

Chapter three argued that it is necessary to prepare the "scene" for the fundraiser. The chapter discussed the strategic planning process (starting with the question of where the organization is now and ending with written objectives and action plans) as well as the case statement - a fundraising document which is prepared for use in the process of soliciting funds.

Chapter four discussed the question of who the constituents of the organization was, before looking at sources of revenue. The chapter identified three major sources of revenue: Individuals, corporations and trusts of which individuals form the majority of donors, especially Christian organizations. Each source was discussed in detail. Finally, it was emphasized that the organization should test its ability to attract funds from individuals, corporates and trusts. Only then can it decide which sources are the most cost-effective to spend time and money on and only then can the organization decide which methods to use in soliciting funds.

Chapter five and six discussed the practical process underlying the method, to solicit funds from the different sources discussed in chapter four. The first method discussed was relationship fundraising (soliciting from individuals), this was followed by personal support raising, a method often used in missionary organizations where individuals are responsible for supporting themselves as well as some of their missionary activities. Thirdly, special events covered the spectrum of sources available to the organization and are intended to be fun happenings to create more visibility for the organization as well as to broaden the financial base.

Fourthly, a more "formal" method was discussed which is used to solicit funds from corporates. The fifth method - trust funding - follows much the same process used in approaching corporates. Capital funding on the other hand - the sixth method - is specialized and specifically used to raise capital for large projects such as buildings.

Chapter seven attempted to give a preview of what a reader does in the first twenty seconds, when receiving a package in the mail, it discussed eight steps toward successful fundraising letters and gave the sequence of a good letter. This was followed by the rules or principles involved in writing a successful package. After the theory was discussed the chapter reviewed nine packages in detail, pointing out what is good about them and what is bad, based on the theory discussed earlier in the chapter.

Chapter eight discussed ethical decision-making in terms of the Biblical principles of: "Love the Lord your God and love your neighbour as you love yourself." It looked at practical ethical issues, after which three dominant ethical principles were then identified:

Respect, beneficence and trust. A process was then developed, using these principles after which ethical codes were discussed and examples given.

In chapter nine it was argued that, when donation and donor administration are properly planned, this is an effective means of lessening routine office procedures and directing efforts to activities that are effective in producing donations. To do this, the fundraiser needed to put in place procedures to handle records of donations on a daily basis. Different evaluation methods were then discussed. It was suggested that, when procedures are in place the fundraiser be placed in a position where he or she can spend time on planning and control.

Chapter ten and eleven looked at the statistical analysis of the questionnaire mailed to 270 Christian organizations. It discussed and analyzed the findings of the questionnaire, came up with conclusions based on the hypotheses and gave certain recommendations.

11.3 CONCLUSIONS

The hypothesis presented in chapter 10 are as follows:

$H_{1_0:}$ Christian organizations exhibit the same professional conduct during fundraising efforts.

$H_{2_0:}$ There is no difference between the professionalism in fundraising between organizations that do not ask for funds as apposed to those that ask directly.

In general the following conclusions can be made:

* Not enough South African literature with a Christian context is available for fundraisers in this field. Most of the literature available comes from overseas.

* Not enough is being done to help Christian organizations understand the concept of fundraising in South Africa.

* Christian organizations do not always believe that it is correct to directly ask for funds.

Specific conclusions include the following:

a) Planning done in the organization:

* Both the askers and non-askers indicated that they do not use tools such as the mission statement to its fullest extent. The non-askers use it less successfully than the askers.

* Board members do not perform well within the organizations. The non-askers also have fewer businessmen on their boards.

* Strategic planning is done on a short-term basis only. Most of the non-askers do planning for only a year while the askers do planning for up to 5 years.

* Budgets are drawn up for operational needs but fewer organizations do that for fundraising. Again the percentage for non-askers is higher than that for the askers.

b) General methods of fundraising

* Most organizations do their own fundraising.

* There is diversity in the fundraising mix of the organizations. Organizations do not concentrate only on one method of soliciting funds. With this question both types of organizations showed their ignorance, the non-askers more than the askers, because they contradicted themselves.

c)   Specific methods of financing

* Donor acquisition is done mostly face to face and with a personalized letter, slip and return envelope, which is acceptable. The problem lies in the fact that organizations do not do enough mailings a year to let their donor basis grow.

* Donor renewal mailing are not done on a more regular basis (at least four times a year).

* Most letters to donors are personalized and donors receive regular newsletters.

* Most of the organizations have a small donor base and this is also reflected in their income received. The non-askers donor bases in income are much smaller than the askers.

* More than half of the organizations covers 50% or less of their total annual requirements.

d) Administration

* The highest percentages for fundraising staff lie between 0-1 persons although the percentage for no staff is much higher for the non-askers.

* Staff is mostly remunerated by means of a salary.

* More than 80% of organizations indicate that they have an administrative system in place, but donor acknowledgement takes place between 4-5 days, which is unacceptable, again the percentage for the non-askers is lower.

e) Financial reporting

* More than 80% of organizations have monthly statements and have them audited.

f) Personal rating

* More than half of the askers indicated that they rated their fundraising between moderately and inadequately. The non-askers on the other hand rated themselves between inadequately and poorly.

In all the categories of the questionnaire namely planning, general methods of fundraising done in the organization, specific methods of financing, administration, financial reporting and personal rating: both the askers and non-askers do not perform well. Comparing the

askers and non-askers with each other the non-askers are worse of than the askers. The hypothesis presented in chapter 10 is therefore not accepted.

11.4 RECOMMENDATIONS

For the organization to function on a professional basis the following should be implemented:

* The board of trustees should be informed of the possible changes and involved from the start. If they do not want to participate and really get involved in the organization they should resign. Their duties should be put in writing and they must make an undertaking to do it at the best of their abilities.

* A committee should be formed to deal with the process of becoming more professional. This process must begin with the strategic planning of the organization, which includes the following: It starts with the question of where the organization is now. This is followed by the question as to where the organization wants to be. Then a SWOT analysis and an environmental scan are done. Together with this, the organization also needs to determine its mission and philosophy statement. After this has been done the organizational and divisional goals can be written, followed by the writing of objectives and action plans for each of these goals which are then tied to a budget. The performance of the plans should then be tracked and measured and, if necessary, corrected.

* The internal and external case statement should be written which can be used for the soliciting of funds. The information needed for this document is found in the strategic plan. The internal case statement will have all the relevant information the fundraiser needs to do the job, while an external case statement is written to tell the story to the organization's donors.

* The constituency of the organization must be identified - those who will support the organization. Only when the constituency have been identified can the organization look at possible sources of revenue. Sources include individuals, corporations and

trusts of which individuals are the most important source for revenue for Christian organizations.

* Methods must be identified to be used to solicit the funds from the different sources. Methods that can be used are: Relationship fundraising and personal support raising, which is used to solicit funds from individuals; special events, which is used to create awareness and solicit funds from a variety of sources, proposals to corporations and trusts and finally capital fundraising, which is used to solicit large sums for capital expenditure.

* To be successful in fundraising creative writing is vital. Either the organization should use somebody within the organization that is good in this field or a consultant that is willing to be involved with the organization and can help with the writing of letters and proposals.

* Many potential conflicts exist in this fundraising environment. In all this the organization and its fundraiser must be aware of the ethical issues involved and be accountable for their actions within the organization and within society – even more so in Christian organizations.

* Everything can be done correctly, but if there is no fundraising administration and financial control in place to steer the organization, it will still not be successful. The organization needs to run the day to day business like a business.

BIBLIOGRAPHY

Alexander, J.O. (1990). Planning and Management in Nonprofit Organizations. In Gies, D.L., Ott, J.S., Shafritz, J.M. The Non-Profit Organization. Essential Readings. Article 12. (pp 155-166). Brooks/Cole Publishing Company.

Anderson, A. (1996). Ethics for Fundraisers. Indiana University Press.

Anthony, W.P. (1988). Strategic Planning. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 8.1-8.29). Second Edition. McGraw-Hill Company.

Barry, B.W. (1986). Stategic Planning Workbook for Nonprofit Organizations. Amherst H. Wilder Foundation.

Brain Jr, P.S. (1991). Establishing a Planned Giving Program. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 96-116). Jossey-Bass Publishers.

Bryson, J.M. (1988). Strategic Planning for Public and Nonprofit Organizations. Jossey-Bass Publishers.

Campbell, D.A. (1988). Constituency Development. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 32.1-32.7). Second Edition. McGraw-Hill Company.

Clarke, S. (1993). The Complete Fundraising Handbook. Directory of Social Change.

Conners, T.D. (1988). Planning the Public Relations Program. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 40.3-40.7).
Second Edition. McGraw-Hill Company.

Conners, T.D. (1988). Public Information. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 41.1-41.13). Second Edition. McGraw-Hill Company.

Craver, R.M. (1991). The Power of Mail to Acquire, Renew and Upgrade the Gift. In

Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 65-79). Jossey-Bass Publishers.

Cuthbert, D.L. (1995). Money that Matters: an introduction to fundraising in South Africa. Second Edition. Van der Walt.

De Klerk, G.J. & du Plessis, P.G. (1990). Budgets as a Financial Management Tool. In I.J Lambrechts (Ed). Financial Management. (pp 147-179). J.L. van Schaik.

Dillon, W.P. (1993). People Raising. A practical guide to raising support. Moody Press, Chicago.

Dove, K.E. (1988). Conducting a Successful Capital Campaign. Jossey- Bass Publishers.

Downes, M. (1987). Downes on Fundraising. Michael Downes.

Duronio, M.A. & Loessin, B.A. (1991). Effective Business Practices in Fundraising. In Burlingame, D.F & Hulse, L.J. (Ed). Taking Fund Raising Seriously. (pp 124-142). Jossey-Bass Publishers.

Espy, S.N. (1990). Corporate Identity and Directions. In Gies, D.L., Ott, J.S., Shafritz, J.M. The Non-Profit Organization. Essential Readings. Article 11. (pp 143-155). Brooks/Cole Publishing Company.

Fellows, M.M & Koenig, S.A. (1950). How to Raise Funds by Mail. McGraw-Hill Book Company.

Flanagan, J. (1991). Successful Fundraising. A complete handbook for volunteers and professionals. Contemparary Books.

Fogal, R.E. (1991). Standards and Ethics in Fundraising. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 263-272). Jossey-Bass Publishers.

Froise, M (Editor). (1992). South African Christian Handbook 1993/1994. Published by

Christian Info.

Grasty, W.K & Sheinkopf, K.G. (1982). Successful Fundraising. A handbook of proven strategies and techniques. Charles Scribner's Sons, New York.

Gross Jr, M.J. & Warshauer Jr, W. (1979). Financial and Accounting Guide for Nonprofit Organizations. Ronald Press Publication.

Haller, L. (1982). Financial Resource Management for Nonprofit Organizations. Prentice Hall, Inc.

Hendriks, H,J. (23/7/96). Modernisme: Ten diepste ons identiteit. Praktiese teologie, U.S.

Jeavons, T.H. (1991). A Historical an Moral Analysis of Religious Fund Raising. In Burlingame, D.F & Hulse, L.J. (Ed). Taking Fund Raising Seriously. (pp 53-72). Jossey-Bass Publishers.

Kohl, M.W. (1994). Fund-raising principles for maintaining continuous giving to Christian Humanitarian ministries. Doctoral dissertation, Gordon-Conwell Theological Seminary South Hamilton, Massachusetts.

Kotler, P. (1982). Marketing for nonprofit organizations. Prentice Hall, Inc. Second Edition.

Kourie, M.A., Oosthuizen, J. (1994). Tax and Trusts Easiguide 1994. DIGMA, Pretoria.

Kuhta, C (1988). Private Foundation Grants. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 34.1-34.9). Second Edition. McGraw-Hill Company.

Lentz, E.R. (1988). Special Events Fund-raising. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 31.1-31.22). Second Edition. McGraw-Hill Company.

Levis, W.C. (1991) Investing more Money in Fund Raising - wisely. In Burlingame, D.F & Hulse, L.J. (Ed). Taking Fund Raising Seriously. (pp 257-271). Jossey-Bass Publishers.

McLeod, J. (1996). The Ultimate Ask. Downes Murray International Fundraising Seminar:

It is all in the ask.

Milani, K (1988). Financial Management and Budgeting. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 47.1-47.21). Second Edition. McGraw-Hill Company.

Mostert, J.B. Rentmeesterksap in die Nederduitse Gereformeerde Kerk van Wes-Transvaal - 'n beskrywend-verklarende studie. Doctoral dissertation, Departement Philosophy and Religious Studies. Universiteit van Natal.

Mullen, R. (1995). Foundations for Fund-raising. ICSA Publishing Limited.

Rosso, H.A. (1988). Fundraising Administration. In T.D. Conners (Ed). The Nonprofit Organization Handbook. (pp 39.1-39.7). Second Edition. McGraw-Hill Company.

Rosso, H.A. (1991). Developing a Constituency: where Fund Raising Begins. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 28-38). Jossey-Bass Publishers.

Rosso, H.A. (1991). Understanding the Fundraising Cycle. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 8-15). Jossey-Bass Publishers.

Rosso, H.A. (1991). Asset Building through Capital Fund Raising. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 80-95). Jossey-Bass Publishers.

Rosso, H.A. (1991). Preparing a Case that Empowers Fund Raising. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 39-47). Jossey-Bass Publishers.

Rust, B. and McLeish, B. (1984). The Support-Raising Handbook. Inter-Varsity Christian Fellowship of the United States of America. InterVasity Press.

Schmidt, J.D. (1992). Evangelism Missions Quarterly. When the pen becomes mightier than the Sword. JA 28. 64-69.

Sheldon, K.S. (1991). Corporations as a Gift Market. In Rosso, H.A. & Ass. Achieving

Excellence in Fund Raising. (pp 227-242). Jossey-Bass Publishers.

Skinner, J.C. & von Essen, L.M. (1982). South African handbook of Public Relations. Revised Edition. Southern Book Publishers.

Tempel, E.R. (1991). Assessing Organizational Strengths and Vulnerabilities. In Rosso, H.A. & Ass. Achieving Excellence in Fund Raising. (pp 19-27). Jossey-Bass Publishers.

Warwick, M. (1993). 999 Tips, Trends and guidelines for successful Direct Mail and Telephone Fundraising. Strathmoor Press.

Warwick, M. (1994). How to Write Successful Fundraising Letters. Strathmoor Press.

Wright, P., Pringle, C.D., Kroll, M.J. (1994). Strategic Management. Allyn and Bacon.

ANNEXURE 1

TE 2665

6 Mei 1996

Die Fondsinsamelaar
CSO
Privaatsak X09
MILNERTON
7435

Geagte Fondsinsamelaar

"Christen-organisasies is onprofessioneel in hulle werwing en bestuur van fondse!"

Dit is die tipe opmerkings waarmee ek gedurig gekonfronteer word as Christen binne die kringe waarin ek beweeg.

Die vraag ontstaan of dit waar is of nie!

Die vraelys vorm deel van die navorsing wat verlang word vir die werwing van 'n M.Comm-graad. Die doel van hierdie vraelys is om 'n beter beeld te kry van Christen-organisasies se werwing en bestuur van fondse.

Ek sal dit baie waardeer indien u hierdie vraelys sal invul en in die ingeslote koevert aan my sal terugstuur so gou as moontlik. Geen posgeld is betaalbaar nie.

Die eerste fondsinsamelaar van wie ek 'n vraelys ontvang, ontvang R250,00.

Baie dankie vir u samewerking.

U medewerker in Christus.

Eleanor Weideman.

NS. As gevolg van die feit dat slegs 'n paar organisasies aan wie die vraelyste gestuur word Afrikaans is, is die vraelyste in Engels, om sodoende koste te bespaar.
Baie dankie vir u begrip!

UNIVERSITEIT VAN STELLENBOSCH
UNIVERSITY OF STELLENBOSCH

TO WHOM IT MAY CONCERN

ARPIL 1996

This is to certify that this questionnaire forms part of the academic research required of me Eleanor Weideman for the completion of her Masters Thesis for the qualification Masters of Commerce as presented by the Department of Businesss Management. As promoter for this study, the undersigned undertakes to manage the study according to the conditions set forward in the questionnaire and that confidentiality will be respected at all times.

You were selected as one of a relatively few very important role-players for making data available for the purpose of this study. The results will be used in the interest of the management sciences and will also be available to you as a contributor to the data base.

I sincerely trust that you will see your way open to contribute to this very important research project. Should the need arise, you can contact me at any time.

In the interest of developing the management sciences.

Sincerely

Prof PG du Plessis
Promoter for this research

Fakulteit Ekonomiese en Bestuurswetenskappe   Faculty of Economic and Management Sciences
Departement Ondernemingsbestuur   Department of Business Management
Privaatsak X1   7602 Matieland   Suid-Afrika   Private Bag X1   7602 Matieland   South Africa
Tel. (021) 808-2026 Faks (021) 808-2226   Tel. (021) 808-2026   Fax (021) 808-2226
E-pos: edvdw@maties.sun.ac.za   E-mail: edvdw@maties.sun.ac.za

THE PLANNING AND FINANCING OF CHRISTIAN, NON-PROFIT, ORGANIZATIONS

CONFIDENTIALITY: THE RESEARCHER GUARANTEES THAT THE DATA GLEANED BY MEANS OF THIS QUESTIONNAIRE WILL NOT BE USED IN ANY MANNER THAT WOULD REVEAL THE IDENTITY OF ANY RESPONDENT.

DENOMINATIONAL AFFILIATION

Tick the answer most appropriate to your organization:

1. Is your organization a

a. para-church organization. (It is independent and not controlled by a specific church-group.)

b. church-related organization. (It is an organization started within a specific church group and still functions within that group.)

c. other. _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

2. If b, specify denomination if possible: _

TYPE OF ORGANIZATION

3. **Tick the answer most suitable to your organization:**

a. evangelical   ☐   c. Christian education   ☐

b. social welfare   ☐   d. other _ _ _ _ _ _ _ _ _ _   ☐

THE THEOLOGY OF THE ORGANIZATION

4. **Tick the answer most suitable to your organization:**

a. Your organization is a faith mission. You _never_ directly <u>ask for funds,</u> but believe God will provide.

b. Your organization prays for funds <u>and</u> <u>informs</u> <u>people</u> about the work being done and about your needs.

c. Your organization prays for funds, but also <u>directly</u> asks for financial support.

d. Other. _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

PLANNING DONE WITHIN YOUR ORGANIZATION

Tick the answer that applies to your organization:

5. Does your organization have a mission statement? (A document that indicates what the organization is doing, how it is being done and why). | YES/NO |

6. Is this mission statement specifically used in communication with the organization's donors? | YES/NO |

7. How active is your Board of Directors in the planning and raising of funds?

| Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly |

8. How many Trustees/Directors do you have on the board?

| a. 1-3 | | b. 4-6 | | c. 7-9 | | d. 9+ |

2.

9. How many of those indicated in 8, are businessmen or have a business background?

10. Does your organization do strategic planning for fundraising?   YES/NO

11. If yes, is this planning done for

   a. 1 year   b. 2-5 years   c. 5+ years   d. a, b and c

12. Is provision made for fundraising expenditure in your budget?   YES/NO

13. Does your organization develop an annual budget for administrative and operational needs other than   YES/NO
    fundraising?

METHODS OF FINANCING - GENERAL

14. Is your organization's fundraising done

a. totally inhouse

b. totally by professional consultants

c. partly assisted by consultants

15. What is the organization's experience as regards to the reaction of donors when asking for:

a. donations for specific projects   Exceptional/Good/Average/Poor

b. donations for operational costs   Exceptional/Good/Average/Poor

c. donations for general administration   Exceptional/Good/Average/Poor

d. donations for reserves   Exceptional/Good/Average/Poor

e. unspecified purposes   Exceptional/Good/Average/Poor

16. What does your organization's fundraising programme include?
    (Tick where applicable)

a. a bequest programme

b. grant solicitation (submitting of grant proposals
    to corporates, trusts for project funding).

c. annual collection days (using volunteers to collect
    money from the public).

d. a direct mail programme (a programme to solicit
    large groups of prospective donors - donor
    acquisition and donor renewal).

e. special events e.g. concerts, shows, fetes

f. other

    _

3.

METHODS OF FINANCING - SPECIFIC

17. How is donor acquisition done (programme to acquire new donors)?

a. a letter that is not personalized
b. a letter that is not personalized and a return envelope
c. a personalized letter, donation slip and printed return envelope
d. personal contact - face to face
e. telephone
f. combination of the above
g. other _

18. If your organization does donor <u>acquisition</u> how many times a year do you contact potential donors through mail shots?

| 1 / 2 / 3 / 4 / 5 / 6 |

19. How many potential donors does your organization contact face to face on an monthly basis? [   ]

20. How many potential donors does your organization contact by telephone on a monthly basis? [   ]

21. If the organization does donor renewal mailings(the objective to encourage donors to make additional gifts), how many time a year is it done? | 1 / 2 / 3 / 4 / 5 / 6 / 7+ |

22. Is your mail correspondence with your donors personalized (addressed specifically to the donor by name)? | YES/NO |

23. Does your organization have a regular newsletter? | YES/NO |

24. How many times a year is the newsletter made available to your donors?

| a. 1 | | b. 2 | | c. 3 | | d. 4 | | e. 5+ |

25. If applicable, list the nature of special events used by the organization in order of success achieved.

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

26. How successful is your organization's special events in raising:

a. new donors | Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly |

b. funds | Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly |

c. publicity (creating awareness)

| Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly |

4.

27. Which events are the most successfully used for the purpose of:

a. raising new donors

_ _

b. raising funds

_ _

c. creating awareness

_ _

28. Approximately how many donors does your organization have on file? ☐

29. What is your organization's annual fundraising income in a year?

a. less than R50 000 ☐   b. between R50 001 and R100 000 ☐

c. between R101 000 and R150 000 ☐   d. between R150 001 and R200 000 ☐

e. between R200 001 and R400 000 ☐   f. between R400 001 and R750 000 ☐

g. between R750 001 and R1 000 000 ☐   h. between R1 000 001 and R3 000 000 ☐

30. What approximate percentage of the organization's total annual requirements is covered through the organization's fundraising efforts? ☐

ADMINISTRATION

31. How many **full-time** staff members do you employ

a. for administration   [0/ 1 / 2 / 3 / 4 / 5+]

b. for fundraising purposes   [0/ 1 / 2 / 3 / 4 / 5+]

c. for operational activities [0/ 1 / 2 / 3 / 4 / 5+]

32. How is the organization's staff renumerated?

a. salary ☐   d. own donor recruitment ☐

b. commission ☐   e. combination ☐

c. personal support schemes ☐   f. other ☐
   (tentmakers)

33. Does your organization use volunteers for:

a. collection days and special events ☐   e. all of the above ☐

b. help in the fundraising office ☐   f. don't really know ☐

c. help with administration ☐   g. other ☐

d. help with the operational activities ☐

5.

34. Does the organization have a system whereby all
    the donors particulars and their donation history is kept   YES/NO
    up to date?

35. If so, how does it work?

a. card system   ☐   c. written in a book   ☐

b. filing system   ☐   d. computer   ☐

e. other

   _

36. How is a donation normally acknowledged?

a. receipt only   ☐

b. unpersonalized letter and a receipt   ☐

c. a personalized letter and receipt   ☐

d. not acknowledged   ☐

e. other   ☐

37. How long (in days) on avergage does it take the organization
    to thank a donor for a donation?

a. 1   ☐   d. 4   ☐

b. 2   ☐   e. 5+   ☐

c. 3   ☐

38. Does the organization's thank you letter contain any
    information as regards to the gift received and the   YES/NO
    application of these funds?

39. Does the thank you letter differ each time the donor   YES/NO
    gives a donation?

FINANCIAL REPORTING

40. Does the organization produce monthly financial reports?   YES/NO

41. What does the organization's monthly financial reports include?
    (Tick those applicable).

a. general ledger   ☐

b. income and expenditure account   ☐

c. income statement   ☐

d. balance sheet   ☐

e. updated comparison with budget   ☐

42. Are the year-end financial statements audited by
    an independent external auditor?   YES/NO

43. Is the auditor a professional, qualified chartered
    accountant?   YES/NO

6.

44. Are these statements used to evaluate the organization's position against the budget figures?

YES/NO

45. Do the organization's donors receive a copy or summary of these reports annually?

YES/NO

IN CONCLUSION:

46. In your opinion, how successful do you consider the organization's following programmes to be?

a. donor administration system

Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly

b. operational activities

Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly

c. fundraising attempts

Exceptionally / Satisfactorily / Moderately / Inadequately / Poorly

Optional information which will be kept confidential

Organization's name:_ _

Address:_ _

Telephone number: _

Fax number: _