



fundraising and marketing

*tools for
biodiversity conservation
and
development projects*





SANBI Biodiversity Series 20

Fundraising and marketing: tools for biodiversity conservation and development projects

The third in a series of project management handbooks, dealing with fundraising and marketing as a pathway to learning in a people-centred development context

compiled by
Cape Action for People and the Environment



Pretoria

2011



SANBI Biodiversity Series

The South African National Biodiversity Institute (SANBI) was established on 1 September 2004 through the signing into force of the National Environmental Management: Biodiversity Act (NEMBA) No. 10 of 2004 by President Thabo Mbeki. The Act expands the mandate of the former National Botanical Institute to include responsibilities relating to the full diversity of South Africa's fauna and flora, and builds on the internationally respected programmes in conservation, research, education and visitor services developed by the National Botanical Institute and its predecessors over the past century.

The vision of SANBI: Biodiversity richness for all South Africans.

SANBI's mission is to champion the exploration, conservation, sustainable use, appreciation and enjoyment of South Africa's exceptionally rich biodiversity for all people.

SANBI Biodiversity Series publishes occasional reports on projects, technologies, workshops, symposia and other activities initiated by or executed in partnership with SANBI.

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Preface

We are pleased to present the final in a series of three handbooks that form part of the C.A.P.E. Partners Toolbox, and follow on from the previous two publications, *Project planning: tools for biodiversity conservation and development projects* and *Monitoring and evaluation: tools for biodiversity conservation and development projects*.

We hope that this third publication, focusing on Fundraising and Marketing, will be of use to organisations and projects across the C.A.P.E. Partnership.

This resource provides practical tips from A to Z: from researching and approaching new donors, to developing a funding strategy, to writing a funding proposal and, finally, developing a marketing plan. I believe it will be of use to anyone mobilising resources for their project or organisation.

I wish you the best of luck in using this handbook, and hope that, used in conjunction with the other C.A.P.E. Toolbox handbooks, this will strengthen your project development, funding and evaluation.

Onno Huyser

Chair: C.A.P.E. Implementation Committee
January 2011

Message

The Critical Ecosystem Partnership Fund (CEPF) has supported the production of this handbook. It is a resource that adds value to our investment in biodiversity conservation in the Cape Floristic Region biodiversity hotspot and in other biodiversity hotspots where CEPF is investing globally.

Organisations that do thorough research on donors' criteria before approaching them and tailor-making their applications to meet these criteria and areas of focus where appropriate are more likely to be successful in securing funds for their projects. This resource provides the tips and steps necessary in planning for, and implementing a fundraising and marketing plan, as well as writing a good fundraising proposal.

Coupled with the Project Planning and Project M&E handbooks, this handbook will equip current and future grantees with an invaluable set of tools that will assist in making projects more relevant, more impactful and more sustainable.

We welcome the addition of this handbook to the C.A.P.E. Partners Toolbox and encourage readers to apply it to their own projects and programmes.

Dan Rothberg

Grant Director

Critical Ecosystem Partnership Fund

January 2011

Acknowledgements

This handbook is preceded by and builds on the material contained in the *Project planning: tools for biodiversity conservation and development projects* and *Monitoring and evaluation: tools for biodiversity conservation and development projects* handbooks prepared by the South African National Biodiversity Institute (SANBI) for the C.A.P.E. Partnership and published by SANBI in 2007 and 2008 respectively.

The complex process of project development, fundraising, implementation and monitoring has highlighted a number of constraints for project planning in the biodiversity conservation sector. The *Fundraising and marketing: tools for biodiversity conservation and development projects* handbook concludes the series of handbooks in the C.A.P.E. Partners Toolbox which guide project developers and other practitioners through the project cycle.

SANBI's C.A.P.E. Coordination Unit managed the process of producing the material for the handbook. Material was developed and compiled by Jill Ritchie, an accomplished fundraiser and writer of fundraising and marketing resources for the South African NGO community. In the course of developing this handbook, a number of other people also made valuable contributions. Caroline Petersen, Azisa Parker and Mandy Barnett provided a clear foundation for the development of the handbook. Lesley Richardson and Onno Huyser were effective sounding boards throughout.

Representatives from three non-profit organisations generously provided time and insight for the purpose of generating case study material. They are:

- Cape West Coast Biosphere Reserve Company
- Eden to Addo Initiative
- Friends of the Baviaanskloof Wilderness Area

SANBI's Publications Unit was responsible for technical editing, design and layout, and cover design for the handbook.

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The C.A.P.E. Programme is hosted by the South African National Biodiversity Institute and is supported by 23 signatory partners.

Acronyms

C.A.P.E.	Cape Action for People and the Environment
CWCBR	Cape West Coast Biosphere Reserve
CBO	Community-based organisation
CIPRO	Companies and Intellectual Property Registration Office
CSI	Corporate Social Investment
EPWP	Expanded Public Works Programme
FOBWA	Friends of the Baviaanskloof Wilderness Area
M&E	Monitoring and Evaluation
NPO	Non-profit Organisation
PBO	Public Benefit Organisation
SA	South Africa
SARS	South African Revenue Service
SANBI	South African National Biodiversity Institute
TMF	Table Mountain Fund
UNESCO	United Nations Educational, Scientific and Cultural Organisation

Glossary of non-profit terminology

Accountability—the duty of a beneficiary organisation to inform donors of the use of their money, backed up by financial statements.

Activities—the actions, tasks and services an organisation carries out to create its outputs and outcomes, and achieve its aims.

Appeal letter—a letter, generally but not exclusively, to an individual asking for a donation.

Attrition rate—rate at which donors are lost due to their not renewing donations or subscriptions.

Bequest—money given by means of a will (after death).

Campaign—a planned effort to mobilise a specified amount of money, resources, volunteers or donations-in-kind within a certain period of time.

Capital campaign—a one-off intensive fundraising drive for a specific item, usually a vehicle or building.

Cause related marketing—a marketing exercise in which a company uses the name and logo of an organisation to assist in the sale of its goods or services and provides the organisation with a financial reward.

Codicil—an addition made to a will. This is often what donors do to include a bequest for a charity in their existing wills.

Commemorative gift—a charitable donation made to remember or honour someone or an occasion.

Community-Based Organisation (CBO)—start-up group of concerned citizens addressing a problem. CBOs are not registered and later evolve into NPOs.

Core costs—running costs or overheads; the day-to-day expenses incurred by organisations (including salaries, administrative costs and rent) but excluding the direct costs of running projects.

Corporate governance—(good) sound stewardship of donated funds (fiduciary responsibilities of board members), running an organisation within the parameters of its constitution, the laws of the land, morally and ethically.

CSI (Corporate Social Investment)—companies' term for funding donated to organisations as well as for the upliftment of the communities where their employees live.

Development officer—donor marketer, grants officer. Alternative terms for 'fundraiser'.

Discretionary trusts—money left in trust or given to a trust to be used for charitable purposes but unspecified. Trustees can disburse such monies at their own discretion.

Donation-in-kind—a gift other than money (often something, or even a service, produced or offered by a company (e.g. food, stationery, equipment or even expertise).

Endowment campaign—a dedicated fundraising drive to raise or generate money for the specific purpose of investing such funds in the interests of the long-term financial self-sustainability of an organisation. Ideally, interest from such investments would pay all running costs in time.

Fundraising audit—an evaluation of all aspects of an organisation's fund development functions, including staff capability, computerisation levels, potential sources of funding and capital to spend on funding.

Fundraising cycle—the functions of fundraising from planning to receiving donations often covering a twelve-month period.

Grant-in-aid—a term that has come to be associated with donations from various tiers of government as well as foreign missions.

Grant-making criteria—policies of donors as to what type of organisation/projects they support and sometimes specifying geographical areas and/or profiles of beneficiaries (e.g. HIV/AIDS, environmental, health, education).

Grant-making guidelines—a document produced by a company, trust or foundation explaining how organisations should go about their application process and itemising required enclosures.

Income generation—organisations making rather than raising money through the sale of products or services, consulting or venue hire.

Lapsed donor—previous donor who is no longer giving. Usually, but not necessarily, associated with individuals.

Matched funding—money promised, conditional upon the organisation obtaining (usually a rand-for-rand) matched amount.

Non-Profit Organisation (NPO)—An organisation, not a for-profit business or an arm of government, constituted in order to address a societal need.

NPO Act—Non-Profit Organisation Act of 1998. South African legislation governing the NPO sector. This act provides for voluntary registration by non-profit organisations and also stipulates the conditions for maintaining such registration.

NPO Number—a number granted by the Department of Welfare NPO Directorate on successful registration by an NPO in terms of the NPO Act.

Organisational budget—a document listing/itemising every anticipated expense as well as source of income for a coming financial year, for an entire organisation. A shortfall would then represent the amount to be raised/generated.

Patron—usually a high profile person who lends his or her name to an organisation, endorses the organisation and occasionally attends events or signs important letters. Rarely, if ever, attends meetings.

Payroll giving—fundraising initiative whereby employees (including entry level workers) agree to have a donation (usually a small amount) deducted from their wages/salaries in order to support an organisation.

Pledge—a promise, in writing, to donate (usually at a later date).

Public Benefit Organisation (PBO)—A non-profit organisation registered with SARS for tax benefits afforded such entities.

Resource mobilisation—a term rapidly gaining popularity to describe the broad process of organisations finding money, friends, volunteers, donations-in-kind and establishing income generating projects in the interests of their future financial self-sustainability.

Seed money—an early donation to begin a new project or to launch an organisation. There is an accepted element of risk to giving this money.

Underwriting sponsorship—money given or guaranteed by the marketing department of a company for a fundraising event for which it receives advertising, naming rights, brand promotion and/or corporate identity promotion but conditional upon the repayment of money should the event make a profit. If the event shows a loss, the company forfeits its money or has to cover costs.

Volunteer—someone who works for an organisation entirely without payment other than reimbursements of expenses such as telephone calls, travel and meals. People who receive nominal payment/honoraria are not volunteers, but employees and their organisations are liable under current labour regulations.

Using the CD

This is an autorun disc—the CD will start to run automatically when placed in CD/DVD ROM drive. If the CD does not start automatically, please double-click the 'BSeries20.exe' icon to launch the presentation. To exit the presentation, press 'Esc' on the keyboard.

Resources on the CD

Apart from a full electronic (pdf) copy of this publication, the following resources are also available on the CD:

- Application for registration by a nonprofit organisation
- Application for registration in terms of the Nonprofit Organisation Act, 1997 (NPO act no 71 of 1997)
- Government Gazette 17 March 2000—Amendment to Lotteries Act
- Friends of the Baviaanskloof Wilderness Area Trust (IT986/2001)
- Lotteries Act
- Policy for the allocation of grants in aid
- Tax Exemption Guide for Public Benefit Organisations in South Africa

Introduction

WHY THIS HANDBOOK?

The majority of people who care deeply enough to be working in biodiversity conservation, whether paid or voluntarily, generally have backgrounds in the natural sciences or do so due to their passion for sustaining all life forms. They rarely have experience in fundraising. With an estimated 110 000 non-profit organisations (NPOs) in South Africa, the competition for donated money is tough and is exacerbated in times of global recession. There is also a shortage of trained and experienced fundraisers in the country, particularly people with strong English writing skills. Despite South Africa's constitutional protection of its citizens' 11 languages, English remains the primary language of written communication, the language of business and, essentially, the language of the local and international donor world.

Fundraising, with communications, fits under the banner of marketing. All three are integral to the financial sustainability of NPOs. In the same way as removing a leg of a three-legged stool would cause it to wobble and probably collapse, ignoring aspects of these pivotal areas will prevent an organisation from carrying out its work from a stable base. Also, fundraising for NPOs that people have not heard of—that carry no brand recognition—is harder. Fundraising is rarely easy but it is made easier for organisations that are credible, well-known and, ironically, sustainable. Success breeds success. Donors often prefer to fund successful organisations rather than those struggling to survive (as they may not be around in the future and donor money will be deemed to have been wasted). Take heart, though, if yours is a new organisation. All NPOs started small and grew and developed organically. Some did so more rapidly than others. Most formal and informal studies of today's established organisations show that those whose growth path was faster, while remaining sustainable, were guided by well thought out and realistic funding, marketing and overall strategic plans. In addition, conservation in South Africa has evolved from the older model of excluding people and is now more often about people benefiting from nature. This interests new donors who have not previously supported conservation and thereby opens new funding sources.

Competition for donated funds (and other resources) comes from groups involved in areas as diverse as HIV/AIDS, education and welfare as well as the broader green sector. This handbook, with its specific focus, aims to guide everyone working in biodiversity conservation in fundraising for and marketing their organisations in the context of this competition. It is intended to both assist in seeking money from donors dedicated to funding environmental projects and to offer strategies to broaden the income base from additional sources. Biodiversity conservation is essentially an idea whose time has not only come but is already overdue. It is easier now to market and seek financial support for the continued strengthening of the web of life that connects us all, than it was in past years. However, organisations dedicated to this work continue to face tough funding challenges. Interlinking marketing and fundraising is therefore the most sensible strategy. People, trusts administered by people, companies overseen and staffed by people, with people as customers, and governments elected by people, are both the donor pool (target market) for support for organisations in conservation as well as the ultimate beneficiaries of this mammoth collective effort in sustaining and securing our natural heritage.

With a substantial majority of the six million people residing within the Cape Floristic Region and reliant on the area for their livelihoods, the people of the Western, Northern and Eastern Cape Provinces have an obvious affinity with the work of organisations in biodiversity conservation. Many may not realise this, hence the importance of marketing the work of such NPOs and community-based organisations (CBOs). It is also in the interests of the other 44 million South Africans that these precious resources are sustained. Their interconnectedness with these provinces remains a marketing (and fundraising) priority. This work also influences the future quality of life of the people of Africa and everyone globally. Basing the financial strengthening of biodiversity conservation organisations on the enlightened self interest of potential donors, would therefore be a suggested strategy.

HOW THIS HANDBOOK CAN BENEFIT YOUR ORGANISATION

As this book is focused on fundraising for biodiversity conservation, relevant examples, experiences and knowledge are included. Anyone involved in marketing or fundraising for conservation should be better enabled to carry out these tasks with the benefit of this advice. The generosity with which staff and volunteers from the organisations profiled, and others, have shared their experiences and the author's and editors' years of working in the non-profit (and particularly fundraising and marketing) arena, are all aimed at assisting you in the processes of seeking and securing funding for your organisations and, effectively, securing their survival. It is intended that the information in this book benefits both new start-up groups as well as established organisations.

This book is the third in the series of handbooks in the C.A.P.E. *Project Development Toolbox* (following Handbook One: *Project planning: tools for biodiversity conservation and development projects* and Handbook Two: *Monitoring and evaluation: tools for biodiversity conservation and development projects*).

HOW THIS HANDBOOK IS STRUCTURED

This book follows the real flow of the marketing and fundraising processes. From the setting up of a new biodiversity conservation organisation, project identification and potential donor research, to planning as broad an income base as possible, this book will guide you through the key steps in fundraising and marketing. These steps will enable professional resource mobilisation in order to sustain the invaluable work undertaken by dedicated groups in conserving the precious biodiversity entrusted to this generation of South Africans. Where practical and applicable, experiences and advice from established organisations active in biodiversity conservation are provided.

LAYOUT AND ICONS

In order to make this book as reader-friendly as possible, its layout has been designed for easy access to the required information. The book can be read cover to cover or used as a ready reference on specific topics. Language has been kept simple, and lengthy text has been avoided in order to enhance its value to everyone, particularly people new to the, often daunting, dual tasks of marketing and fundraising. After all, anyone reading this handbook is a passionate conservationist first and fundraiser second.

Icons enable quick and easy identification



Examples

Input from the featured organisations active in biodiversity conservation have been included to illustrate practical examples and experiences and can be readily identified by the lizard icon.



Resources and ideas

Quick tips, resources, including websites and pertinent information, are included in boxes and areas marked with a protea.



Exercises

Suggested exercises are provided throughout the book in order for you to apply the information to your specific needs, challenges and circumstances. Carrying out these exercises will help you to reflect on newly learnt information and consider how best to apply it to your organisation. These exercises are indicated by a butterfly icon.

CASE STUDIES

Three respected organisations of different sizes, at varying stages of their own development and in different parts of the Cape Floristic Region, all active in biodiversity conservation, agreed to share their experiences in the development of this guide in order to offer readers more than theory. The author wishes to thank them for their support, encouragement and their willing sharing of their experiences.

Cape West Coast Biosphere Reserve

The Cape West Coast Biosphere stretches northward from the Diep River in Cape Town to the Berg River and covers 378 000 hectares of coastal lowland plains. It is unique in terms of its natural beauty, biodiversity, history, culture and location. Given the conflict between urban, industrial and agricultural land uses, the terrestrial, marine and aquatic natural ecosystems require careful planning and management to ensure their survival. This is the focus of the Cape West Coast Biosphere Reserve (CWCBR).

www.capebiosphere.org

Eden to Addo Corridor Initiative

The Eden to Addo Corridor Initiative is a civil society conservation organisation that aims to create an effective pattern of habitats stretching from the Wilderness Lakes in the Eden District to the Addo Elephant National Park in the Eastern Cape, ensuring ecological connectivity for species, communities and ecological processes. Recognising that parks and reserves are often too small or isolated to sustain viable populations of key species or to maintain watershed and other vital ecosystem services, this NPO developed a biodiversity conservation corridor to conserve viable populations of threatened and endemic species, to ensure as much territory as is required by wide-ranging mammals, such as elephants, and to cover sufficient terrain to sustain natural processes such as water cycles, carbon and nutrient cycling, seed dispersal and pollination. The Eden to Addo Corridor Initiative team members identify landowners in the area willing to engage in conservation and then study the biodiversity and conservation worthiness of their land.

www.edentoaddo.co.za

Friends of the Baviaanskloof Wilderness Area

Seven biomes and three global biodiversity hotspots intersect in the Eastern Cape Province, where 80% of land supporting important biodiversity is outside of protected areas and is privately or communally owned. The Baviaanskloof Wilderness Area includes the Baviaanskloof Mega-reserve, the Formosa Reserve and Groendal Wilderness Area. The Baviaanskloof Wilderness Area has been awarded World Heritage Status as part of the Cape Floristic Region.

Concerned that not enough is being done to protect Eastern Cape biodiversity, the Friends of the Baviaanskloof Wilderness Area Trust (FOBWA) was formed in order to promote a conservation ethos in respect of the biodiversity, cultural heritage, ecology and geographical history of the area. It promotes community involvement and participation, enjoyment, education and safeguarding of all local resources. FOBWA works closely with the Eastern Cape Parks and Tourism Agency (ECPTA) and assists in facilitating various of its innovative but under-funded projects.

www.fobwa.net

Section 1: Preparation

By the end of this section, you will have:

- Reflected on your organisation's values, vision and mission.
- Realised the importance of defining the values, vision and mission if you have not already done so.
- An understanding of the legalities affecting non-profit bodies.
- A better understanding of tax exemption options for NPOs.

In the beginning

All non-profit organisations worldwide, including international leaders such as Greenpeace, The World Wide Fund for Nature (WWF) and Friends of the Earth, started because a group of people (often just a few) recognised a problem and cared strongly enough to address it. Such a group of concerned citizens is, effectively, a community-based organisation (CBO). As the registration processes for an NPO can take a year or two, it is vital to begin these early, to be clear as to the purpose of forming such a group and to avoid having goals that are too broad and ambitious. It's best to start small and grow funding and staffing (even if volunteer-run) organically and enable steady, managed expansion.

(People from established organisations may skip over this section, however, if you are engaged in helping new biodiversity conservation groups to start up, this information will provide a useful reference.)

1.1 IS YOUR ORGANISATION READY TO FUNDRAISE?

Groups starting up in biodiversity conservation initiatives may elect to work under the banner of a statutory body such as a provincial parks authority. However, this could negatively affect funding from certain quarters, for example, companies, trusts or even individuals, who may consider the financial support of the project to be the responsibility of government. Various pieces of legislation provide the framework for implementation of biodiversity stewardship programmes. These include the National Environmental Management: Biodiversity Act and the National Environmental Management: Protected Areas Act.

Completing the following brief checklist (Figure 1) will help you to determine how ready your organisation is to begin seeking donor funding.

Figure 1.— Is your organisation ready to fundraise?

Issue	Yes	No	Status
Constitution registered			
NPO Certificate			
PBO registration			
Governance functioning optimally			
Financial controls in place			
Monitoring and evaluation policy and systems per project in place			
Clear and functioning donor reporting systems			
External evaluation commissioned and completed			
Image (internal): all staff and volunteers happy and committed			
Image (external): awareness of and happy with the public perception of NPO			
Projects clearly identified			
Project budgets accurate and acceptable			
Appropriate capacity—time			
Appropriate capacity—skills			
Fundraising department staffed and skilled			
Staff and board support for fundraising			
CEO-board relationship sound			
Fundraising board portfolio/committee			
Donors' rights clearly outlined			
Income generation: earning/making money initiatives implemented			

1.2 VISION, MISSION AND VALUES

It is vital to ensure that everyone is clear as to the purpose of an intended organisation. Clarification at this embryonic stage ensures that everyone involved will be committed to the long hours and hard work (usually voluntary) that define the start up phase of a CBO. Ironically, given the interconnectedness of biodiversity conservation, one of the toughest aspects of starting a new initiative can be to define the scope of its work. With the magnitude of the danger of extinction to almost 1 800 fynbos plants in one of the world's most threatened hotspots, one's instincts will often be to undertake more than the founding group can manage. Therefore, establishing a sound foundation for a fledgling organisation should be the priority.

Vision

One popular definition of an organisation's vision is:

The long term changes in a local community, country or the world, that an NPO envisages if/when its mission is achieved.

Another, more simply put, is:

The vision is what an organisation wants to achieve, within a specified time frame.

Vision of Eden to Addo Corridor Initiative

To link three mega-reserves, namely the Garden Route National Park, the Baviaanskloof Mega-reserve and the Addo Elephant National Park, by means of natural corridors, to protect and restore the integrity of biodiversity and ecosystem functioning.





Vision of Friends of the Baviaanskloof Wilderness Area (FOBWA)

The vision of the Baviaanskloof Mega-reserve Project is to expand and consolidate the existing protected area and create a mega-reserve in which the conservation of the region's biodiversity and natural resources is aligned with rural and agricultural development needs.



Vision of Cape West Coast Biosphere Reserve (CWCBR)

We see the Cape West Coast Biosphere Reserve as the best international example of integrating rapid growth and change with biodiversity conservation, sustainable living and heritage preservation.

Mission

The mission is the purpose for which an organisation was formed and exists and generally does not change much over time. It can be defined as:

A summary of the beneficiaries or issue that an NPO exists in order to impact upon and describes the difference/improvement that the organisation wants to make.



Mission statement of Eden to Addo Corridor Initiative

To assist and engage with landowners and all stakeholders to identify and develop a living corridor from Eden to Addo by applying sound land-use practices, encouraging a diversity of environmentally sustainable livelihoods and linking ecologically important areas, for the benefit of biodiversity and the extended community.



Mission statement of FOBWA

The initialisation and realisation of projects in co-ordination with diverse interest groups and full community involvement for the promotion of the conservation ethos with regard to the entire spectrum of biodiversity, cultural heritage, ecology and geological history of the area, to ensure that it can be enjoyed and safeguarded for present and future generations.

Values

An organisation's values are the beliefs upon which it was founded and which guide its actions and decisions.



Ethos statement signed by members of Cape West Coast Biosphere Reserve

As a member of the CWCBR, I aspire to the values underwritten by the CWCBR and more importantly UNESCO's Man and the Biosphere (MAB) initiative. This means that the written mission of the MAB initiative to bring man, environment and economic activity into balance (sustainability) is my inspirational framework.

I/My commercial entity would like to be a responsible citizen and pledge to that effect not to engage in, be the catalyst for and allow any abusive relationship that negatively influences man, our environment or our socio-economic interaction. I will engage in activities, be they social, commercial or recreational, in such a manner that is responsible to community, environment and the CWCBR.

Exercise: Clarify your organisation's mission, vision and values

If your organisation does not yet have a set of values spelt out, a vision or mission, discuss these with your key stakeholders and brainstorm around the wording of such statements. If your organisation has these:

- Has anything changed?
- Are they outdated?
- Revisit them to ensure that they are still relevant and underpin your work.



1.3 THE CONSTITUTION

A constitution is required in order to legally register a non-profit organisation.

The Constitution can be defined as:

A document stating fundamental principles by which an NPO is governed and which dictates trustees' duties, scope of authority and the handling of specific tasks, such as the number of people required to form a quorum, the termination of board members' involvement or of the dissolution of the organisation.

An example of a model constitution is included on the CD-ROM accompanying this book for adaptation to suit a new organisation.



The Trust Deed of Friends of the Baviaanskloof Wilderness Area is included on the CD-ROM provided with this book.



1.4 FROM CBO TO NPO—THE LEGALITIES

There are a number of requirements for CBOs to evolve into legally constituted NPOs to, amongst other things, be able to attract money from companies, trusts and foreign donors.

The Non Profit Organisations Act of 1997, which governs the activities of NPOs in South Africa, is included on the CD-ROM provided.



Legal registration

By international standards, South Africa has some of the most enabling legislation governing non-profits. All such bodies must be governed by a set of rules—a constitution or articles or memoranda of association. These are determined by the choice of legal structure, which in South Africa include:

- Section 21 Company not for gain—registered with the Company Intellectual Property Registration Office (CIPRO).
- Trust—registered with the Registrar of Trusts.
- Voluntary Association of Persons established in terms of a constitution—registered with the Department of Social Development's Directorate of Non Profit Organisations.



Should you elect to register in terms of Section 21 of the Income Tax Act, your registration will be with the Companies and Intellectual Property Registration Office (CIPRO).

www.cipro.gov.za



If a trust is preferred, it must be registered with the Master of the High Court.

www.justice.gov/za/master/trust



We chose a Section 21 Company as it was less expensive and quicker to register than a trust.

Eden to Addo Corridor Initiative



Requirements for registration as a non-profit organisation

The organisation's constitution must:

- State the primary and ancillary objectives.
- Spell out that members and office bearers have no rights to the property and assets of the organisation.
- Detail the manner in which decisions will be made and mechanism of governance.
- Provide procedures for convening meetings.
- State the financial year.
- Clearly detail the operation of a bank account.
- Address procedures for changing the founding document (constitution).
- Determine proper methods of accounting and financial reporting.
- State that financial records must be kept for five full financial years.
- Deal with procedures for closing the organisation and the transfer of assets on dissolution.

Applying for an NPO Certificate

Once an organisation is registered in terms of the selected structure, an NPO Certificate should be applied for from the Department of Social Development's Directorate of Non Profit Organisations. Attaining and maintaining NPO registration assures donors of an NPO's compliance with the requirements of the Directorate. In order for an NPO to maintain its registered status, annual proof of transparent sound and best practices must be provided. These include proof of regular board meetings (with the required quorum, or minimum number of people, present) and the timely production of independently audited financial statements. Organisations in good standing will have their NPO numbers available on the website of the Department of Social Development as proof of their compliance.

The NPO Act of 1997 regulates the functioning of all NPOs in South Africa. Interestingly, it is not illegal for a group of concerned citizens—a CBO—to raise money to address a problem. However, when wanting to seek funding from companies or trusts, it is imperative for the organisation to be legally registered, have an NPO Certificate and be afforded Public Benefit Organisation (PBO) status from the South African Revenue Service (SARS). In order for an organisation to maintain its NPO status, its board and management are required to comply with a number of practices (such as holding regular board meetings and submitting audited financial statements to the Directorate of Social Development). Corporate and trust donors therefore place substantial emphasis on organisations complying with these requirements as a measure of their credibility and will generally not consider requests for funding from organisations which do not retain their NPO and PBO status.

The Department of Social Development has a user-friendly website with extensive information on the benefits and value of obtaining an NPO number. The NPO Certificate application form has been included on the CD-ROM provided with this handbook.

www.dsd.gov.za/npo



Public Benefit Organisation status

Registered organisations may apply to SARS for PBO status, provided that their objectives are the provision of public benefit activities in a not for profit manner. The tax exemption aspects of non-profit organisations are governed by the Income Tax Act No. 58 of 1962, which has had a number of amendments in response to the evolving environment in which NPOs function. The benefits of PBO registration include:

- Exemption from capital gains tax.
- Exemption from stamp duty.
- Exemption from income tax.
- Exemption from transfer duty.
- Donors are exempt from donations tax.
- An estate is exempt from estate duty on property bequeathed (left in a will) to an organisation with PBO status.

Requirements for registering as a PBO:

- The founding document (constitution or articles of association) must clearly state the organisation's not for profit pursuits.
- At least three people (who are not related to each other) must undertake fiduciary responsibility for the organisation.
- Funds of the organisation may only be used for the stated purposes. Surplus monies must be invested in registered banks or unit trusts but not, for instance, in private companies.
- The organisation may trade provided that income from such activities does not exceed 15% of annual income (otherwise it will be deemed to be in competition with business and will be liable for tax on income exceeding this 15%).
- The organisation must register with the NPO Directorate.



PBO Guidelines

This resource, available on the CD-ROM accompanying this book, provides the detailed steps required when registering with SARS for PBO status.



Exercise: Status check

- Presuming that your organisation has a constitution, is it still current or have there been substantial changes since its inception?
- Are you maintaining your NPO status?
- Are you maintaining your PBO status?

If any of the above require addressing, do so urgently in order to enable donor support for your work.



Section 2: Strategic planning

By the end of this section, you will have:

- Understood the concept of strategic planning.
- Recognised the importance of planning strategically.
- Clarity on the planning process.
- Sufficient understanding in order to undertake planning within your organisation.

2.1 INTRODUCTION

All non-profits, whether newly formed biodiversity conservation groups/CBOs or large established NPOs, must strategically plan all aspects of their organisations: their governance and management, their programmes/projects and their marketing and funding. For those starting out, such planning may be the identification of stakeholders, networking with target and affected communities such as landowners, tribal authorities or industry, and approaching people to help in 'championing' their causes. An established but smaller organisation may need to plan an expansion. A large NPO will be required to plan strategically to maintain its level of support and service delivery, including possible new projects, while taking into account all factors within the organisation (that it can control) and externally, that are generally out of its control, and therefore more challenging to address.

Strategic Plan—Definition

A strategic plan (often written up as a business plan for three to five years) outlines the strategies to be employed (literally the things to be done) in order to achieve an organisation's goals and objectives and to fulfil its mission.

Strategic planning is the formal consideration of an organisation's future course. All strategic planning deals with at least one of three key questions:

- What do we do?
- For whom do we do it?
- How do we excel?



Donors consulted unanimously agreed that they encourage organisations to have strategic or business plans as:

- They demonstrate that the NPO can deliver.
- They show how risk has been thought through.
- They provide clarity on the longer term plans of the organisation.
- They show whether the NPO and its projects are realistic.
- They provide a sense of security to donors.
- They clarify the thinking behind an organisation and its programmes/projects.

Strategic plans demonstrate organisations' credibility by:

- Showing a history of sound management, good stewardship and appropriate practices.
- Showing clearly thought out and practical systems and structures.
- Outlining skills and competency amongst core staff/volunteers.
- Showing clear and thorough feasibility studies for new initiatives.
- Sharing monitoring and evaluation policies and systems.
- Highlighting sustainability plans (which will often include income generation).



As corridor conservation was a new idea, we were fuelled by our passion. We developed a mode of action which became our strategy. We had to regularly revisit our strategy as we found that certain ideas did not work. In addition, we had to adapt our strategy for different areas.

Eden to Addo Corridor Initiative



We hold strongly with the 'keep it simple' principle when strategising. We suggest that community projects are started on a small scale, effectively as a pilot. It is also an integral part of our strategic planning to identify pilot projects that, when successful, can be replicated.

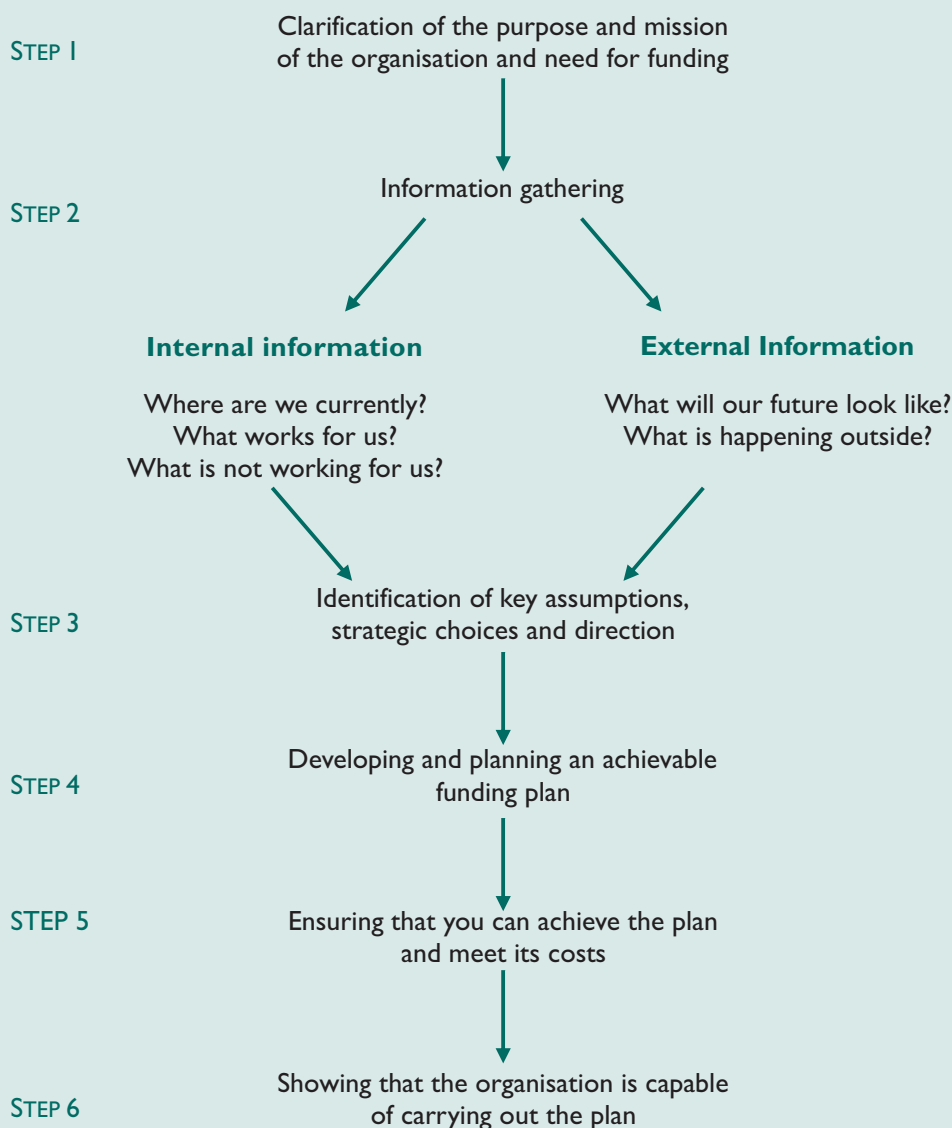
FOBWA



2.2 THE PLANNING PROCESS

Planning must be inclusive. Plans do not work well if imposed on people. It is therefore advisable to have the right people—as many as appropriate—involved in all aspects of planning for the organisation, its funding and service delivery. If possible, conduct strategic planning exercises in an enabling environment, away from your office and interruptions. The flow chart below illustrates the process.

Figure 2. — The strategic planning process in six steps.



A SWOT analysis

Carrying out a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is an excellent exercise to kick-off a strategic planning session. This also helps participants to gather information on which to base planning. Consider the strengths and weaknesses of your organisation; internal factors are usually easier to address and improve upon than external threats. Opportunities, while also external, offer innovative possibilities and can generate exciting ideas, particularly by harnessing the group's creative dynamics, fuelled by everyone's passion to conserve the biodiversity in the area. The following figure illustrates the framework for undertaking a SWOT analysis.



Figure 3.—A SWOT analysis—complete this breakdown to kick-off a strategic planning session.

Strengths (internal)	Weakness (internal)
Opportunities (external)	Threats (external)

Exercise: Conduct your own SWOT Analysis

- What are the **strengths** of your organisation?
- List the **weaknesses**.
- Which external factors are **threats** to your organisation?
- What **opportunities** are emerging externally that tie into your organisation's strengths?



Exercise: Creating opportunities

What can you turn into an opportunity?

Go back to your SWOT lists and consider the possibilities of turning negative factors into positive ones resulting in opportunities.





When meeting to plan hiking trails, we had to consider factors as varied as the presence of dangerous animals, rules for visitors and the marking out of trails for inexperienced hikers.

FOBWA



The goals (and objectives) articulated at the stakeholder workshops held as part of the preparation of our strategic and business plans were grouped into common themes and developed into the following goals:

- To ensure effective, participatory and adaptive management of the CWCBR.
- To develop a high profile biosphere reserve with environmentally aware and informed stakeholders.
- To contribute towards furthering sustainable development in the biosphere reserve.
- To contribute towards an understanding of the unique assets of the biosphere reserve.
- To contribute to coherent planning at all levels within the area.
- To contribute to the conservation of the unique assets of the biosphere reserve.

CWCBR



Figure 4.—Goals of the strategic plan

As part of the Cape West Coast Biosphere Reserve strategic planning process, 13 goals were developed, drawing on inputs from stakeholders, the Board and UNESCO. The goals of the strategic plan fall into five categories, or themes. These are further divided into two broad groups, namely operational and programmatic goals. The former relate principally to the functioning of the organisation, while the latter define the work of the organisation.

THEME	GOALS
	PROGRAMMATIC
Conservation	1. To conserve, maintain and rehabilitate biodiversity in the Biosphere Reserve. 2. To conserve non-renewable resources. 3. To maintain the palaeontological, historical and cultural heritage of the Biosphere Reserve.
Sustainable development & planning	4. To contribute to enhancing the sustainable economic well-being of communities. 5. To contribute to coherent planning at all levels to provide models of land management. 6. To adopt the precautionary principle to development in the region.
Stakeholder support	7. To seek stakeholder and community support for the Biosphere Reserve. 8. To develop a high profile Biosphere Reserve.
Research & monitoring	9. To comprehend and understand change in the region.
Education & capacity	10. To provide education, awareness building and training to further community and stakeholder knowledge.*
	OPERATIONAL
Operational & institutional	11. To secure adequate initial and ongoing management resources for the Biosphere Reserve. 12. To ensure effective, participatory and adaptive management. 13. To coordinate with national and international networks.

* these are high-level goals that will take time to achieve as biodiversity needs to be conserved in perpetuity and sustainability is a long-term goal.



Figure 5.—The elements of an NPO strategic plan.

Section	Content
An executive summary (written last)	One page outline of mission, values and work. It should highlight the proposed direction, key benefits and make the case for the organisation.
Track record of the organisation	Making the case for the organisation. Showing that it has the management competence and experience necessary to manage the plan. The past experience of the organisation and its key personnel could be listed.
Introduction and mission	Include the mission statement in full. Explanation of purpose and duration of the business plan.
The organisation's background	A brief history of the organisation. Its legal status. Include basic and factual information, such as: • Legal status and relationship to any parent organisation. • Scale of operation—where the work is carried out, what the NPO does and who the beneficiaries are. • Size of the operation—number of projects, staff and budget.
Achievements to date	A short review of the organisation to date. Emphasise strengths, achievements and external recognition as well as honest appraisal of weaknesses. Use a SWOT analysis.
Future trends	An outline of how the organisation sees its future environment developing. Refer to likely needs of those served. The plan must show that thought has been given to likely external developments.
Strategic direction	What assumptions underpin the chosen direction? What will be the main direction of the organisation's work? What will be its main priorities? What will be different?
Strategic aims	Statement of aims for the medium term. The specific objectives for each aim could be listed or a brief summary of them given.
Implications	Areas of work that will change should be noted. Organisational, legal or any other key implications should be listed here.
Financial implications	How will the plan be funded? Income and expenditure projections for first year and estimates for following years. Listing of financial assumptions behind the plan.
Immediate action plan	Timed action for the first steps in the plan.

2.3 STRUCTURE OF NARRATIVE PLAN—PUTTING IT ALL TOGETHER

Once you have spent as much time as required on considering all factors, internally and externally, affecting your organisation and its work, identified opportunities and agreed on what can realistically be undertaken, given your various constraints (such as funding, staff/volunteer time and skills), the 'way forward'—generally for three to five years—should be written up into a narrative strategic or business plan. It's also a good idea to summarise the 'To do' items into an action plan at the end. Include the name of the person or people responsible for each task and a realistic deadline.

Introduction/background

Provide background information on your organisation, the biodiversity of your geographical area and your conservation focus. The plan, once written up, will both guide the functioning of the organisation and act as an excellent orientation document for new staff, volunteers and board members.

Update on previous strategic plan

If you had a previous plan, explain where, how and why the new one replaced it. For example:

- Was what you had been doing working?
- If not, why not?
- What worked well that could be enhanced and expanded upon?
- Were any new species identified?
- Were any lost to the area? (If so, why?)
- How many additional landowners agreed to participate?
- How many sustainable jobs did you help to create?
- What income generating initiatives have you implemented?
- Have they been successful?
- If not, can they be profitably resuscitated?

If you had no previous strategic plan, omit this section and incorporate previous learning curves and successes into the introductory section.

Current status

Why is a new plan needed? Is it simply because the previous one had expired or did factors within the organisation, the biome or the country highlight the need for an updated plan?

The needs

Short term/immediate needs

What are the most immediate issues requiring attention? These are often related to funding, but in biodiversity conservation they may involve other factors. There may be a crisis within a hotspot, a need to lobby for new legislation or an issue not addressed early enough which now needs urgent attention. The prioritised items on the action plan will hail from these needs.

Medium term needs

Usually, but not exclusively, this section follows after the addressing of the most urgent priorities. There may have been developments planned in the past, but factors out of your control delayed their implementation. In other cases, a lack of human or financial capital might have prevented expansion. The medium term will be different for different organisations, depending on how young or established they are and the levels of threats to species in the areas under their stewardship.

Long term needs

What are your longer term dreams?

What would you like to do when you have addressed the most urgent and secondary needs?

Constraints

Your SWOT exercise will have identified your internal and external challenges. These should be outlined in this section of the plan.

Positive factors

Again, referring to the SWOT analysis findings, write up—and celebrate—your successes, ‘credibility edge’ factors and all other positive attributes of your organisation. It’s vital to do this as it boosts the spirit and helps to balance the problems.

Staffing/volunteer team structure

Incorporating the current staffing organogram, positions to be filled (usually when funding permits) and volunteer opportunities, keeps one focused on the size of the team and the extent of their roles and responsibilities. This should help to keep the plan realistically aligned with the capacity of the organisation to deliver.

Implementation

Keep the implementation of the strategic plan SMART:

- Specific.
- Measurable.
- Action-oriented.
- Realistic.
- Time-defined.

Budget

Including a summary of the projected costs of the activities in the plan as well as the core expenses of the organisation will demonstrate how much it will all cost. If the strategic plan is intended to cover a three-year period, the budget should be projected (including inflationary increases) to cover the same period. The budget should also include any secured or committed funding in order to arrive at the projected shortfall, i.e. the amount to be raised and generated.

Methods of funding/fundraising

Once the projects, core costs and required amount are agreed upon, sources and methods of funding these needs should be planned (note: a dedicated funding plan is covered in Section 7 of this handbook). The funding or resource mobilisation plan, ideally covering more than just fundraising, can form an addendum to the overall strategic plan or be incorporated into a larger consolidated plan.

Marketing and public relations

To develop a marketing plan, you need to know the strategic direction of the organisation, its projects (some may be new) and the level and extent of the funding required and target markets as well as renewed clarity on stakeholders. Like the funding plan, it generally warrants being developed as a stand-alone document. It too can be summarised within the strategic plan. Marketing plans are addressed in Section 8.

Monitoring and evaluation of the plan

- How will the plan be monitored?
- Who will check that the organisation is operating within the collectively agreed-upon direction, priorities and budget?
- How often will the monitoring take place?
- Most importantly, what structures and who will be involved should problems arise or unforeseen factors emerge that require attention, possibly urgently?
- How will the outputs and outcomes of the ongoing monitoring and resultant findings be evaluated, by whom and how often?

The answers to these questions should help you to ensure that the plan is not merely drawn up and ignored.

Risk management

This is considered by many to be the hardest aspect of a strategic plan as we cannot predict the future, yet risk management must not be neglected. We **can** anticipate certain potential problems and have

measures in place to address these. Biodiversity conservation NPOs' exposure to risk can generally be categorised into:

- A lack of funding and other resources.
- Harm to people—staff, volunteers, beneficiary communities and/or visitors.
- Damage to or loss of structural and organisational resources such as buildings, vehicles, computers and other equipment as well as software and systems.
- Harm to the reputation of an organisation.

Considering 'If, then...' scenarios

- If we are not able to raise or generate sufficient funding, then we will...
- If people are hurt or die while working on one of our projects, hiking or biking on our trails or attending our events, we will...
- If the good name of the organisation is negatively affected, we will...

This entails having a crisis public relations (PR) plan in place. Who will address the media in case of a problem? It is vital to ensure that a senior person and, preferably only one person, professionally interacts with the media. A crisis PR strategy will ensure that different people representing the organisation do not make contradictory statements. The identified senior representative must be appropriately prepared to deal with the media in the event of an emergency.

Action plan

The action plan, a 'To do' list with deadlines and people responsible for each task, should be drawn up, ideally in table form, and updated regularly. It will act as a readily available monitoring tool.

Executive summary

Although it appears in the front of the document, an executive summary should be written last and succinctly capture the core points of the strategic or business plan.



Avoid the mishandling of public utterances such as the monumental gaffes by BP chief executive, Tony Hayward, during one of the world's worst environmental disasters, the Gulf of Mexico oil spill in 2010. He described the 100 000 barrels (or 170 million gallons) of oil that gushed into the sea for 23 weeks as 'relatively tiny compared to the size of the ocean' and spoke of wanting the leak to be plugged as 'I'd like my life back'.



At this time we are still a small enough organisation that when anything happens, phones start ringing and we work together to address critical issues. In Port Elizabeth, the 10 minute city, we can quickly meet in emergencies.

FOBWA



Should a crisis arise, our chairman is our designated spokesperson.

CWCBR

Exercise: Apply risk management thinking to your action plan by considering 'what ifs?'

This should highlight all aspects of planning required to ensure the smooth ongoing functioning of the organisation should key staff members be away, if funds and other resources are limited or other potential challenges occur.

- What if he/she/they are away from work due to illness or family emergencies?
- Do you have potential stand-in people?
- What if the required funds are late or don't come in at all?
- What knock-on effects will a shortage of funding have on:
 - People's livelihoods.
 - The conservation of the biodiversity in the area.
 - The organisation's credibility.
- What will you do should this happen?



Exercise: Think through how you would handle a crisis

- How ready is your organisation to deal with emergency situations, whether within the organisation or the areas in which you work?
- Brainstorm around potential scenarios and how ready you are to handle them and who would act as spokesperson.



Exercise: Write up your action plan

Once your organisation's strategic plan has been completed, pay special attention to the action plan as an exercise. Think carefully about each task:

- Who is to carry it out?
- How realistic is each deadline?



Exercise: Write up an executive summary for your strategic plan

As many people find it harder to write a short document than a long one, ask a few people within the organisation to tackle this task. The final document may well be a cut and paste version of their various efforts.



Section 3: Project funding

By the end of this section, you will have:

- An understanding of the use of the terms 'project' and 'programme'.
- Clarity on some donors' preference for funding projects or programmes but not running costs.
- An understanding of corporate and trusts' grant-making criteria.
- Tips on researching to find potential donors for projects.

3.1 WHAT IS A PROJECT AND HOW DOES IT DIFFER FROM A PROGRAMME?

The term 'project' is often considered to be an initiative that has a beginning, a middle and an end. This concept is used in this way in both corporates and government. In the non-profit sector the term 'project' is mainly used to describe and group the services that NPOs carry out. Such projects may well continue on an ongoing basis. The various pursuits undertaken within a project are generally known as the activities. To add to the confusion, some organisations prefer to use the term 'programme' to describe their work. Others view their projects to be components of one or more programmes. For example, a sustainable livelihoods programme run by a biodiversity conservation organisation may have projects addressing alien plant clearing, recycling and fire breaks, whilst its food security programme might consist of two projects: one addressing organic vegetable gardening and the other the prevention of over-grazing by cattle farmers' animals.

Donors consulted preferred the use of 'project' but, in cases where a programme comprises inter-related projects, they were comfortable that the choice of the term is left to the NPO. The important issue is that non-profit organisations' staff members are able to define the services carried out, the areas addressed and/or their specific work. The term 'project' is used in this book.



Projects of the Cape West Coast Biosphere Reserve

- Sustaining the conservation gains.
- Establishment of a World-First Industrial Biodiversity Corridor.
- Junior Land Care Project.
- Bursary Project.
- !Khwa Ttu San Cultural Centre Fynbos Rehab and Indigenous Medicinal Nursery.
- Conservation Officers and Stewardship.
- Knowledge Exchange Project.
- Alien Clearing Project.
- R27 Tourism Hub and Information Bureau Project.
- Small Grants Fund Project (similar to the SKEPPIES fund).
- Kogelberg Biosphere Reserve Support Project.
- Trails and Tourism Project.
- Spatial Development Plan Project.
- EIA Commenting Project.
- Mountain to the Sea Life Skills and Environmental Education Project.
- Internship Project and Environmental Education.
- Food Garden Project.

Eden to Addo Corridor Initiative

With the focus on conserving the biodiversity, primarily through a project to remove alien vegetation, in the area between the Eden and Addo municipal districts, ongoing activities include:

- Identifying ecologically important corridors on private land.
- Assisting landowners in choosing the right tools to conserve natural processes.
- Disseminating information and building awareness amongst relevant groups.
- Linking private land to existing protected areas.
- Establishing and maintaining a conservation corridor between Eden and Addo.
- Stimulating and supporting appropriate economic and tourism opportunities.
- Supporting and encouraging sustainable livelihoods through nature-based activities.



Friends of the Baviaanskloof Wilderness Area

Taking local community beekeeping in the Baviaanskloof to a commercial level is a project of the Eastern Cape Parks and Tourism Authority (ECPTA) but is assisted by FOBWA, as the donors supporting the project would not fund a statutory body.

Near Studtis in the western section of the Baviaanskloof Nature Reserve (BNR) a community lives on old farmlands that have been incorporated into the Reserve. ECPTA adopted a beekeeping project as a means of providing more local people with gainful self-employment. The concept of beekeeping is consistent with good environmental principles in that beneficiaries move away from environmentally unfriendly small farming practices. This encourages greater involvement in the green economy by the entire community, as success is achieved via this project.



3.2 WHY DONORS FUND PROJECTS

Donor funding is largely project-based. Corporate, trust and most government donors fund clearly defined projects. They do not fund what they often perceive as the bottomless pit of an NPO's bank account. Donors want to fund change. They seek to enter into symbiotic partnerships with NPOs—their money and an organisation's abilities, infrastructure and local knowledge—in order to address a problem, to bring about change. Ideally, more projects would have a beginning, middle and an end, which would mean that a problem had been eradicated. This rarely happens. Greenhouse gas emissions, excessive packaging with inadequate recycling and the maintaining of steady water supplies are examples of ongoing challenges that require sustained public awareness, lobbying for legislation change and for millions of people to change their attitudes and habits.

Donors interested in, for instance, funding various aspects of river clean-ups may not want to fund land reform as water is the focus of their grant-making. Should a biodiversity conservation organisation be involved in clearing fire breaks and creating awareness of climate change, only an appropriate water related project would 'fit' or qualify for support from that specific donor. It should also be noted that many corporate and trust donors have a ruling of funding one project within one organisation once in a financial year.

In addition to corporate and trust donors' focus on the specific sectors that they support, many have a policy not to fund organisations' running costs. As all donors have the right to fund the sectors, organisations and projects of their choice, NPO staff and board members must respect this right. It is imperative to have your list of projects clear before writing up budgets, developing proposals for them or beginning to research potential donors.

Figure 6.—Finding and recording facts on corporate, foreign, foundation and trust potential donors.

Always look for donor information and application procedures and requirements on donors' websites before telephoning them. Understandably, they become irritated at their time being wasted when one asks for information that is freely available on their websites. Always say that you have looked at their websites and have a few questions to which you could not find the answers on their sites. If the information is really not there, your query will often cause them to update their websites. As the donations of trusts and companies' from their CSI budgets are public information, it is quite acceptable to ask 'in principle' questions as one is not calling to ask for money. Some of the information to ask a corporation, foundation, trust or other major funding organisation might include:

- Contact details—postal, physical address, e-mail, website.
- Name, address and title of appropriate contact person.
- Grant making criteria.
- Application deadlines.
- Who makes the decisions?
- How/when are decisions made?
- Guidelines for proposals or application forms.
- Reporting requirements.
- Any special accountability needs.
- The size of the annual grants budget.
- How donations are made (one-off/tranches).
- One year/multiple year.
- Gift-in-kind possibilities.
- Are staff secondments offered/BEE point partnerships?



Exercise: Project identification

List the projects undertaken by your organisation (existing and/or intended):

- Was this quick and easy to do?
- If not, why not?

In order to know whether you have a fundable stand-alone project (as opposed to an activity or component of a larger project), consider whether it has a clearly identifiable budget and whether you are able to explain the need or problem to be addressed and the intended activities.

If some on your original list are not in fact stand-alone projects and are activities of projects, re-do the exercise until you have your projects clearly defined.

3.3 WHY PROJECTS GUIDE POTENTIAL DONOR RESEARCH

As corporate and trust donors focus so specifically on projects and their own identified areas of priority, research by NPOs' fundraisers for potential donors should therefore be based on their organisations' own projects. Donors refer to their grant-making criteria, focused giving areas or the sectors that they support. All in fact refer to projects. Therefore, being clear on exactly which projects your organisation delivers (or intends to carry out) is always the starting place of potential donor research.

Donor research

How did we manage to find potential donors in the pre-Internet days? It has certainly revolutionised donor research. It can be a bit overwhelming, though. If you enter words such as 'donors', 'environment' or 'biodiversity conservation' and even if your search is confined to South Africa, you may well have thousands of search results.

Tips on seeking project funding from C.A.P.E./SKEP Marketplace 2009

- Donors from the private sector are often motivated by enlightened self-interest—seeking projects that relate to their staff and client base and that will build their business in the long term.
- Projects with a well planned double dividend of conservation wins and livelihood gains may find it easier to secure support.
- Projects are not appealing when the proponents appear to be unaware of a significant amount of work that has already been done or is currently being undertaken by other role-players in the same or similar field.



Exercise: Donor research

Who is funding other organisations doing similar work? Try using Google or your search engine of choice and find other organisations involved in similar projects to yours. See who their funders are and visit those websites.



The CD-ROM provided with this handbook contains databases of local companies and trusts as well as foreign foundations and trusts that fund biodiversity conservation in South Africa.

This is aimed at providing you with a quick and ready list of potential donors. However, ongoing monitoring of new sources of support for your organisation and its projects is vital, and should be an integral part of your resource mobilisation.



We advise organisations to be on the lookout for ad hoc projects in which social needs are addressed and thereby biodiversity is conserved. Donors generally respond well to a conservation need that also provides people with sustainable livelihoods.

ECPTA/FOBWA



Section 4: Sources of funding—statutory

By the end of this section, you should have:

- An understanding of why government funds NPOs.
- An understanding of why your NPO should not become reliant on government funding.
- Project ideas for seeking statutory funding.
- Started to identify projects that might qualify for National Lottery funding.

4.1 GOVERNMENT

Governments worldwide support non-profit organisations to a greater or lesser extent. The South African government, at all three tiers, has supported environmental and conservation organisations for decades. However, the amount of money being channelled from the various government structures to NPOs today is at an unprecedentedly high level. One of the reasons for this level of giving is that government does not have the capacity and infrastructure to deliver many services as effectively, efficiently and cost-effectively as does the non-profit sector.

Warning

Although it is to be encouraged for organisations to seek as much government money (and from as many tiers and government departments) as possible, NPO board members, managers and fundraisers must not fall into the trap of becoming reliant on government funding. This is true for reliance on any one or a few larger donors. Should one or more then reduce the amount given, run late or even decline entirely, the organisation can find itself in a dangerous position—this is one of the most common reasons for NPO failure, closing down or bankruptcy. However, this is then not a case of ‘the useless government’, ‘the slow Lottery’ or ‘the unreliable foreign donor’. This is a case of mismanagement—from the highest level—the buck stops with the board members who carry the fiduciary and legal responsibility of the organisation.



It is critical to broaden the donor base and to keep this task uppermost at all times.

4.2 THE EXPANDED PUBLIC WORKS PROGRAMME

The Expanded Public Works Programme (EPWP) is one of government’s initiatives to provide work and training for large numbers of unskilled and unemployed people. The EPWP involves creating temporary work opportunities for the unemployed, using public sector expenditure. It is one of several government strategies aimed at addressing unemployment. The fundamental strategies are to increase economic growth in order that the number of net new jobs created starts to exceed the number of new entrants into the labour market, and to improve the education system such that the workforce is able to take up the largely skilled work opportunities which economic growth will generate. In the meantime, there is a need to put short to medium term strategies in place, such as the EPWP.

The EPWP cuts across all departments and spheres of government. Under the EPWP, all government bodies and parastatals are required to make a systematic effort to target the unskilled unemployed. It focuses on four broad sectors: infrastructure development (such as road works and water and sanitation projects), non-state (support for employment creation by NPOs and CBOs), social (early childhood

development and home-based care) and environment and culture (the sector under which projects run by most readers of this book will fall).

The Department of Environmental Affairs and the Department of Water Affairs are responsible for coordinating the implementation of the EPWP in the environment sector, through initiatives such as the Working for Water (WfW) programme, the Landcare programme, the Coastal Care programme, Working on Fire, Working for Wetlands, Working for Lands, Working for Energy and Working on Waste.

See www.epwp.gov.za

Working for Water

Since its inception in 1995, the Working for Water (WfW) programme has cleared more than a million hectares of invasive alien plants, providing work and training to approximately 20 000 people from amongst the most marginalised sectors of society each year. Of these, 52% have been women. There are over 300 projects in all nine provinces. Scientists and field workers use a range of methods to control invasive alien plants including mechanical, chemical, biological and an integrated control.

The programme is globally recognised as one of the most outstanding environmental conservation initiatives on the continent. It enjoys sustained political support for its job creation efforts and the fight against poverty.

WfW considers the development of people as an essential element of environmental conservation. Short term contract jobs, created through alien plant clearing activities, are undertaken, with the emphasis on endeavouring to recruit women (the target is 60%), youth (20%) and the disabled (5%). Creating an enabling environment for skills training, the programme is investing in the development of communities wherever it works.

From the website of the Department of Water Affairs:

www.dwaf.gov.za/wfw/dfault.aspx



The Department of Trade and Industry is responsible for coordinating the EPWP in the economic sector, including concepts such as incubator programmes for small businesses, which obtain work from government and community-based income-generating projects. This should be considered when sustainable livelihood options are explored for marginalised communities.

www.dti.gov.za



Figure 7.— An overview of the environmental and culture sector of the Extended Public Works Programme.

The environmental and cultural sector of the EPWP will continue to grow and will continue to be implemented by national and provincial departments. Allocations to the sector have increased and have included funds to initiate the Working for Energy programme, which is an interdepartmental initiative. The sector will be able to grow faster from 2010 when it will be able to access the wage incentive as well. Growth in the sector will come both from increasing the number of work opportunities and increasing the duration of work opportunities.

Environment and culture sector 5-year targets: number of work opportunities to be created.

Year	Total	Municipal	Provincial	National
2009–2010	150 000	3 043	48 657	98 300
2010–2011	156 000	3 165	50 603	102 232
2011–2012	200 000	4 058	64 876	131 067
2012–2013	275 000	5 579	89 204	180 217
2013–2014	375 000	7 608	121 642	245 750

Environment and culture sector 5-year targets: number of full-time equivalents to be created.

Year	Total	Municipal	Provincial	National
2009–2010	32 609	1 103	9 494	22 012
2010–2011	41 739	1 412	12 152	28 175
2011–2012	59 130	2 001	17 215	39 914
2012–2013	81 304	2 751	23 671	54 882
2013–2014	110 870	3 751	32 279	74 839

Information from: www.epwp.gov.za

Working for Water

The Working for Water initiative is rolled out regionally through structures in all nine provinces. The Department of Water Affairs encourages biodiversity conservation organisations to contact the offices listed in the box below for updated information and developments pertaining to each geographical area. In addition, annual implementation and programme workshops are held in each province. Representatives from conservation organisations are advised to attend these. Programme leaders in the offices listed in the box below will have details of all planned events, including these vital annual workshops.

Each region has a five-year plan and calls for funding partnerships are made based on these plans. The provincial office staff can also advise as to details of each call and the relevant deadlines. It is vital that biodiversity conservation organisations match their requests for funding in line with their provincial WfW initiative's stated objectives.

Up-to-date information on WfW's latest wage incentives are available both on the Department of Water Affairs' website (see www.dwa.gov.za/wfw/) as well as from the provincial programme leaders. A requirement, though, is that applicant organisations must be established and that WfW funding will not cover management costs.



Working for Water Provincial Offices:

Eastern Cape
19 Moore Street
Quigney
East London 5200
Tel.: 041 586 4884

Western Cape
3 Blankenberg Road
Bellville 7530
Tel.: 021 941 6000

Northern Cape
Cnr York & Chappell Street
Old Mutual Building, first floor
Kimberley 8301
Tel.: 053 802 0500

We have participated in the Working for Water programme via our local municipality. Our best advice is that NPOs should endeavour to forge personal relationships with staff members at their local municipal offices. The procedures to access these contracts differ per region and it is therefore very helpful to be on good terms with local officials who can guide one through the requirements.

CWCBR



4.3 OTHER GOVERNMENT FUNDING

It is important to look out for municipal, district or provincial notices in newspapers, particularly local community publications, which are generally free. In some cases, notifications are made via local radio stations and notices are also put up in community areas such as libraries and local authorities' facilities. Also look out for notices of meetings of municipal sub-councils. It is vital to attend as many such meetings as possible to be aware of local authorities' plans and where and how your work can be aligned, what partnership opportunities arise as well as potential funding. Do not only restrict your interest and attendance to meetings pertaining to broader environmental matters or biodiversity conservation issues. Ongoing networking with office bearers and admin staff at both municipal and provincial level can only benefit your organisation.

Grants-in-aid

Monies available from municipal budgets for NPOs are known as grants-in-aid. Although these are generally smaller amounts than those offered by provincial government, they should be sought and relationships should be forged and nurtured at local level too.

Grants-in-aid are almost always project based, are usually made for smaller amounts and the method of application is the completion of an application form, often tailor made to each specific grant call. As applicant NPOs are required to have a proven track record, grant-in-aid funding is rarely given to new organisations. City officials consulted advised that applications for funding should be realistic and not ask for large amounts, as such funding is generally limited. Most municipalities have grant-in-aid policies and fundraisers are encouraged to study such policies within their local municipalities.

Applicants should be registered NPOs. Most municipalities require that supporting documents are certified and proof of bank details are provided as well as an NPO certificate, tax clearance certificate, latest municipal rates account and latest audited financial statements.

The Grants-in-Aid Policy of the City of Cape Town is included on the CD-ROM provided with this handbook.





Figure 8. — Grant-in-aid request for applications for funding advertisement.

GRANT-IN-AID 2010/2011 REQUEST FOR APPLICATIONS FOR FUNDING Arts and Culture

The City of Cape Town's Economic and Social Development Department invites applications for funding from Arts organisations and institutions providing services within the Performing Arts sector and located within the municipal boundaries of the City.

The proposals should be project based, promoting adult, youth and children's theatre productions and focus on relevant issues in the community (i.e. HIV/Aids, Substance Abuse, Cultural Diversity, Gender Equality and Disability). Proposals should also have a strong Training and Development component.

All applicants must have a proven track record.

Applicants should be realistic when drafting their proposals as funding is limited. Budgets should be presented on a project basis for aspects as determined in the Grant-in-Aid Policy.

Applicants should be registered as a not for profit organisation (i.e. NPO, NGO, Section 21, Trust, etc). Organisations should take note of our Grant-in-Aid Policy, which is available on application. Supporting documents must be certified and should include proof of bank details, NPO certificate, tax clearance certificate, latest municipal rates account and latest audited financial statements.

Application must be made on the prescribed application form, which is available from the 8th Floor, Waldorf Arcade, 80 St Georges Mall, Cape Town or can be downloaded from www.capetown.gov.za. Only original application forms will be accepted.

The closing date for application is Friday, 11 September 2009 at 16:00. Completed application forms should be hand delivered to our offices on the 8th Floor, Waldorf Arcade, 80 St Georges Mall, Cape Town.

**Further information: Natalie Harper on
Tel 021 483 9059**

ACHMAT EBRAHIM
CITY MANAGER



CITY OF CAPE TOWN | ISIXEKO SASEKAPA | STAD KAAPSTAD

THIS CITY WORKS FOR YOU

3209 CD 8VN8F0

4.4 THE NATIONAL LOTTERY

The Arts, Culture, Environment and National Heritage Distribution Agency of the National Lottery is a good source of funding for biodiversity conservation organisations. This allocation of funding is not only reserved for projects in the performing and visual arts, as the shortened and more generally used version of its name implies (The Arts Lottery). The Arts, Culture, Environment and National Heritage Distribution Agency members feel strongly about supporting environmental initiatives.

Changes pertaining to the allocation of money from the National Lottery Distribution Trust Fund, announced by the Minister of Trade and Industry in July 2010, directed that more funding should be allocated to rural areas. Calls are made via the media from time to time, in general annually. Understandably, the National Lottery Board (NLB) has stringent requirements, as it is the custodian of billions of rands. The primary requirements for fully fledged NPOs (referred to in Lottery documentation as 'Registered Organisations') are:

- Two full years' audited financial statements.
- Signed and registered constitution.
- NPO Certificate.

Assisted Organisations

In response to early criticism, much of it from CBOs and newly formed NPOs, via the media, of young organisations not yet complying with all of the NLB's requirements and not therefore receiving money, an option of being an 'Assisted Organisation' was implemented. The requirements have changed and evolved in the few years since this was introduced. It is therefore vital that the guidelines governing each call for applications are studied in depth and carefully adhered to.

The most recent call for applications from the NLB required Assisted Organisations to:

- Be registered as a Non-Profit Organisation, Section 21 Company or Non-Profit Trust or show proof that the process has been begun.
- Have the capacity and human resources to provide the service or run the project for a minimum of one year.
- Focus on a clearly defined need in the community.
- Enter into a partnership with an Assisting Organisation that operates within the same area of focus or any sector that falls within the Arts, Culture, Environment and National Heritage funding mandate.
- Have a current/cheque account with a recognised bank or open an account.
- Keep financial records and be able to produce an Income and Expenditure Statement.
- Be able to provide a physical address from where the organisation operates.

www.nlb.org.za



A contract is required between an Assisted and Assisting Organisation and must clearly state the knowledge transfer to be achieved and the time frames in which this will take place. Fees paid to the Assisting Organisation (from the NLB grant) must also be transparently stated in the contract. Such a relationship should be for a specified period and is not intended to merely enable a funding channel for the Assisted Organisation. The focus must be on monitoring and capacity building within the start-up organisation.

Exercise: Preparation for National Lottery funding

Go to the website of the National Lottery www.nlb.org.za and look at the guidelines for the last Arts, Culture, Environment and National Heritage call for applications. Although the deadline will probably have passed, can you identify a project or projects that you believe would have qualified for funding? If so, check whether your organisation complies with all the stated requirements.





Monitor the media and the Lottery's website for the next funding call and be ready to submit your application early. Applications are date stamped and processed in the order in which they are received.

Section 5: Sources of funding—companies, trusts and foreign foundations

By the end of this section, you should have:

- A comprehension of the background to corporate social investment in South Africa.
- An understanding of the difference between donations and sponsorship from companies.
- Clarity on why companies give money to NPOs.
- An understanding of why trusts donate money and their restrictions.
- Clarity on foreign donors' requirements.

5.1 WHY THEY GIVE

Before beginning to approach a potential company or trust donor by completing an application form or drawing up a funding proposal or even trying to set up an appointment, it is vital to know about the sources of funds potentially available to NPOs involved in biodiversity conservation and why each source provides funds or other resources. Companies give for different reasons than do individuals, and even within companies, the different departments support non-profits for vastly different reasons. In addition, thousands of trusts and foundations exist specifically to fund good work but most are restricted—sometimes even hamstrung—by their constitutions, as to what they can support.

In order to identify potential sources of funding (which may and should go further than grants and donations), it is important to have an understanding of these sources so as to find the 'fit' or 'match' for your organisation. Why would donor A support your work and not donor B? This section covers companies and trusts, local and foreign, that provide funding for projects in biodiversity conservation. However, potential funding for this vital work is not restricted to these sources and ongoing innovation is required to assure the financial sustainability of organisations' projects.

Once we have created a new project—even if it only exists in our minds—we search the Internet using certain key words to identify potential donors. While doing this we also try to match donors' interests in conservation with our projects. Sometimes their grant-making falls outside of our business plan but, if we can find a match, even to start off as a platform for an envisaged project, we approach the donor in the interests of forming a relationship. In fact, initially we focus on establishing a relationship, sometimes before asking for money. We always try to make personal contact with people in potential donors' office, although this is not always easy.

CWCBR



5.2 DONORS' RIGHTS

All donors, be they individuals, trusts, companies or governments, have the right to decide which fields of endeavour they wish to support as well as which organisations' projects to fund. These rights must be respected. Donors owe NPOs nothing. They do not have to give their money away. Whether it is individuals' own money or that entrusted to trustees, members, boards or committees, their decisions must be respected, whether we as fundraisers like them or not. Arrogance has no place in fundraising.

Donors also have both the contractual and moral right to be kept fully informed as to the expenditure of their money every step of the way. Many donor bodies in fact have their own obligations to monitor their donations, particularly when they are managing other people's money.



It is very rare to find a corporate or trust (local or foreign) donor that will support projects carried out by parastatal bodies such as a provincial parks board. Therefore, we raised the funds for our beekeeping project under the auspices of Friends of the Baviaanskloof Wilderness Area (FOBWA).

Eastern Cape Parks Beekeeping Project in partnership with FOBWA

5.3 THE EVOLUTION OF CORPORATE SOCIAL INVESTMENT IN SOUTH AFRICA

Formal support via NPOs for people in need (as well as causes such as the arts, animals and environmental issues) by South African companies has evolved in only four decades. Today, South Africa has arguably one of the most (if not the leading) sophisticated and developed cultures of corporate giving amongst the over 100 developing countries globally.

The Seventies

In 1972, University of Cape Town professor of business, Meyer Feldberg, lobbied local captains of industry to follow the American example of providing funding to uplift the communities where their goods or services were marketed and specifically those neighbourhoods from where their workforces hailed. Although this concept was based more on being in the interests of the long term success of the companies than altruism, corporate South Africa began taking note of Professor Feldberg's advice. At this time, with apartheid's inhumane iron grip on the country, NGOs were multiplying in number every few years, as more and more concerned citizens formed organisations to care for people doubly disadvantaged by both legislated discrimination and poverty.

The apartheid era was a tougher time for NGOs than was generally known. In order to be allowed to raise money, they were required to apply for a Fundraising Number, in terms of the Fundraising Act of 1978. Such applications were vetted by the security police as many NGOs were in fact conduits for foreign funds to support the fight against apartheid—hence the unfortunate term 'struggle accounting'. One could hardly keep transparent and proper records of funds for 'illegal' purposes and, sadly, greed, fraud and corruption occurred on occasion.

1976 saw the Soweto Uprising and nationwide protests against apartheid. The people were showing their anger and frustration at state orchestrated and imposed suffering. To the disdain of the then Prime Minister, the country's wealthiest and most dynamic company chairmen arranged a conference attended by 180 delegates from leading companies in November of 1976 which led to the formation of the Urban Foundation. This was the first ever South African formalised major donor initiative, which lasted two decades, provided R1.8 billion for schools, housing for the poor, community centres and teacher training.

The Sullivan Principles

The most catalytic development to influence corporate support for South African NGOs was the adoption by the United States Congress of the Sullivan Code of Principles. This code of conduct governed American corporations (and their partner companies) worldwide. Aimed at promoting social, economic and political justice, the Sullivan Principles required that a percentage of American companies' payrolls be donated to NGOs in countries operating contrary to international human rights norms (such as South Africa), should they elect to remain and do business in such countries. International support to end apartheid saw the advent and escalation of trade sanctions against South Africa. Some American companies disinvested, while others that chose not to withdraw their businesses, suddenly had millions that they had to give away. Overnight, Corporate Social Responsibility (CSR) departments were started and staff appointed specifically to give these funds away.

Local companies, notably led by the Anglo American group, followed suit and, by the early eighties formal corporate giving had been established in South Africa's top 100 companies.

Cheque book charity

Corporate Social Responsibility in the first two decades after its advent was relatively unstructured and grant-making criteria were not as clearly defined and strategically arrived at as today. Terms such as ‘outcomes’, ‘sustainability’ and ‘evaluation’ had not yet entered the corporate giving lexicon. In most cases of early CSR, a small senior group within a company would decide on areas to support.

Corporate Social Investment

Corporate Social Responsibility (CSR) evolved into Corporate Social Investment (CSI) alongside the advent of democracy in South Africa in the nineties. Giving by companies was, literally, no longer seen as their ‘responsibility,’ but rather as their investment in the future of the country—for the right reasons. Consultation amongst beneficiary communities and staff involvement in determining grant-making criteria (usually with shop steward representation on CSI committees) became the norm.

Best practice models

The new millennium has seen CSI truly coming into its own. CSI is being strategically planned, partnerships (often with government) are entered into, sustainability and methods of monitoring the success or otherwise of NPOs’ projects, are now the norm. After decades of conservation concerns being considered just another left-wing nuisance lobby, environmental issues too have become integrated into CSI policies. Broad Based Black Economic Empowerment (BBBEE) requirements are also beginning to have an effect on CSI. Although compliance on some levels is voluntary, government contracts and tenders are dependent on ‘scorecards’ of tendering companies and their suppliers. The initial challenge for most business owners, large and small, is to understand the BBBEE Act. But it is sure to bring more support—money, donations in kind and skilled voluntary services—to the NPO sector.

Interestingly, education, skills training and projects that enable self-employment and job creation have consistently enjoyed the lion’s share of CSI money in South Africa since the advent of formal corporate giving and not, as is often presumed, HIV/AIDS. It is recognised by many donors that if people are equipped with the skills to earn a living, they will attend to many of their own needs that would otherwise have become the responsibility of the state or a burden on NPOs. Some of the most successful and well-funded biodiversity conservation projects are those that provide opportunities for local communities’ sustainable livelihoods with sound conservation in a win-win manner.

Climate change and the global focus on environmental matters have helped to create broader awareness of the need for biodiversity conservation and companies too have begun to respond to more and more requests for funding for such initiatives than in the past.

Fundraising or Sponsorship?

Although more and more social investment donations are being made with a little more expectation on the ‘something back’ aspect than before, it is usually not the governing force behind these donations.

Ensure, from the outset, that you are clear as to whether you are looking for donated money from a corporate social investment budget or sponsorship. The latter is from companies’ marketing budgets. In that case you will deal with marketing, advertising or even public relations departments. In the case of sponsorship, sponsors expect ‘something back’. This usually means branding (the strategic use of a company’s logo as well as promoting the name of the company and its products or services at all possible opportunities).

To sum up: you fundraise from a social investment budget and obtain sponsorship from a marketing budget.



Figure 9.—Corporate Social Investment (CSI) spending in South Africa.

Over R3.2 billion is given away through South African companies' CSI departments each year. According to De Wet (2009), funds were given to the following fields of endeavour:

Education	34%
Social community development	8%
Entrepreneurship and job creation	11%
Health and HIV/AIDS	15%
Training and skills development	8%
Environment	7%
Non-sector specific donations and grants	2%
Safety and security	2%
Sports development	3%
Arts and culture	1.5%
Housing and living conditions	1.5%
Training and capacity building	4%
Food security	3%

CSI spending according to industry sector during 2009

State-owned enterprises	R260 million
Mining	R280 million
Financial	R260 million
Manufacturing	R190 million
ICT/communication	R170 million
Services	R80 million
Retail/wholesale	R50 million

De Wet, H. (ed.) 2009. *The Corporate Social Investment Handbook*. Trialogue, Cape Town.



Whilst we understand and respect why corporate and trust donors have such stringent requirements for funding to be spent exactly as requested, our reality is that we are breaking new ground in conservation. Corridors mitigate biodiversity loss. 30% of biodiversity loss has happened in the last 40 years. We have to act quickly and in response to changing conditions. We can't always predict how, where and when we are going to have to react to a problem. Having to keep to budgets and project activities as laid out in funding proposals and application forms can be limiting. This leaves no room for pursuing new ideas and restricts research.

We find it best to engage with funders and 'educate' them about the reality of biodiversity conservation in the field and the regular need for rapid response interventions that can't be predicted and laid out in documents a year in advance.

Eden to Addo Corridor Initiative

5.4 TRUSTS AND FOUNDATIONS

Trusts and foundations give money as that is generally why they were set up—to make donations! Thousands of trusts and foundations exist specifically to fund good work, education or religions but most are restricted by their constitutions, as to what they can support. Trusts and foundations are governed by very similar legislation to NPOs, the only difference being that grant-making trusts exist to make donations. They will usually have been established by a benefactor now deceased (but not always, he or she could still be alive but have established the trust as an effective tax mechanism or merely to enable charitable giving).

The primary difference (and often frustrating factor for fundraisers) between corporate CSI and trusts' giving is that companies may and do, change their grant-making criteria regularly. Trustees and board

members of trusts and foundations must, however, disperse monies in terms of the dictates of the founding documents and thereby comply with the wishes of the benefactor. It requires court action to change the beneficiaries of grant-making trusts and is not an easy process. Biodiversity conservation organisations are therefore best advised to consider ways in which their projects might meet the grant-making restrictions of trusts not aimed at environmental issues by assisting communities living in threatened ecosystems and thereby benefiting both people and conservation.

The Table Mountain Fund (TMF) is an independent sustainable funding facility, established to support the implementation of the C.A.P.E. strategy and specifically the conservation of the globally significant biological diversity of the Cape Floristic Region (CFR) and its adjacent marine systems. Founded by WWF in 1998 as an independent trust, the TMF was co-capitalised through investments from South African custodians, as well as the Global Environmental Facility. The fund continues to be operated by WWF-SA.

In conjunction with its partners, the Fund has historically focused its activities in the following conservation needs:

- Protection of prioritised habitats.
- Conservation within the working lowlands.
- Building environmental awareness.
- Control of alien invasive species and restoration of natural biodiversity.
- Applied research that supports biodiversity conservation.
- Enhancement of the global conservation status of the CFR.
- Capacity building of C.A.P.E. partner organisations.

Private Bag X2
Die Boord
7613
Tel.: 021 762 8525
www.tmf.org.za



Donors' views

More than 20 decision-makers from trusts, companies and embassies were asked for their opinions on South African fundraisers. On the whole they echoed one another in the things that both impress and distress them when dealing with those seeking money for their organisations. Their prioritised suggestions were:

Don't be pushy

If your work fits their criteria, your organisation complies with all requirements and is run in a transparent manner, particularly in terms of financial management, and has well-planned monitoring and evaluation systems, your funding application will be duly considered. Donors' budgets are restricted. A hard-sell sales pitch is not appreciated.

Don't knock the opposition

In the same way as donors have the right to decide how to spend their money, so too do other organisations involved in biodiversity conservation have the right to exist and seek donor funding. Don't say anything negative about another organisation. Rather say why you feel yours is amongst the best to address a problem.

Don't send 'Dear Sir/Madam' letters

With the exception of the National Lottery, the vast majority of donors provide the name of the appropriate person to whom to address a request for funding. Merely sending off a letter accompanying a proposal or application form to 'Dear Sir/Madam' shows that you have not bothered to undertake proper research.



Don't waste potential donors' time

Research carefully. Don't submit funding requests to organisations that do not fund biodiversity conservation and, more particularly, your specific type of projects.

Don't submit lengthy proposals

Unless a long and detailed proposal is specifically requested, keep them succinct. Every word is precious—don't waste any. Long (usually waffling) proposals take up potential donors' time and can irritate or even alienate them.

Don't pester potential donors

We call it 'follow-up'; donors call it 'nagging'. Wheels turn slowly in corporate and trust donors' offices. They have their systems and these must be respected. They are inundated by requests, including an alarming number from organisations whose projects fall outside of their ambit of giving. They must sort through them. They must process those that appear to be of interest, sometimes to an advanced level but then rejecting them. To phone and ask about the progress of your request will merely irritate donor office staff members. They will generally have no idea where it might be in their systems. Once appropriate time has passed (usually a few months), follow-up should be done in writing and not telephonically. Follow-up is smoother if your request has been issued with a reference number by the potential donor.

Do be punctual

It is becoming more and more difficult to secure meetings with people from trusts and CSI offices. If you manage to arrange a meeting, don't be late or too early. Both are impolite.

Don't arrive with a crowd

Should a meeting be arranged, don't arrive at a potential donor's office with the entire board, committee or most of the staff. When making an appointment, state how many of you will be there—preferably not more than three.

Don't e-mail unless invited to do so

Some donors (fortunately a diminishing number) will still not accept funding applications by e-mail. If they stipulate 'snail mail', then e-mail is simply wrong and your application may be deleted. There are practical reasons why proposals might need to be posted and these must be respected (e.g. the requirement to send originals of financial statements or a copy of the constitution with your application).

Do complete application forms

Love them or hate them, if donors require forms to be completed, even complicated logical frameworks, their requirements must be met. Do not send a proposal if a form is needed.

Do nurture donors

Donors are your partners. They share your concern for biodiversity conservation. Nurture the relationship. By donating to your organisation, they become involved. Keep them informed with both positive and negative feedback. Should your monitoring highlight a problem area which you immediately rectify, share the learning and solutions with your donor partners. Report to them regularly and not merely in terms of contractual obligations.

Do be honest

If you've received money and encountered a problem, communicate this with the donor immediately. You can usually redeem the situation by outlining a suggested strategy for rectifying matters. Remember, a funding proposal or application form with budget is a legally binding document. Many donors do not require contracts when making grants. They deem the written materials requesting the money to be exactly how the money will be spent. To spend the money otherwise would be fraud. In extreme cases, board members could be liable for prosecution and at minimum, donors would be entitled to their money back, with interest.

5.5 FOREIGN FUNDRAISING

International trusts and foundations also either have application forms or require proposals to be compiled. These should contain more South African and area-specific information than you would provide for a potential local donor. However, as you would only apply to foreign sources following proper research, these would be donors who fund biodiversity conservation and share many of your goals, but may not have the depth of knowledge of local donors of the dangers facing our hotspots.

Generally, existing proposals can be easily adapted for foreign consumption. It is important, though, to add a column in the budget to reflect the donor's currency. Retain the budget in rands and add another column reflecting the appropriate currency (pounds, dollars or euro, etc), as your financial statements will be in rands.

A foreign fundraising trip—dispelling the myths

Too many fundraisers still believe that the way to raise money overseas is to use the resources of their organisation on a trip to London, New York or a European capital to meet with donors. They know not all their visits will be successful, but they believe some will, and they'll return triumphantly with electronic transfers to their accounts before they land back home! How did this myth spread around the world? It simply isn't so.

There are exceptions of course, but in the majority of cases, international donor agencies' staff and trustees do not want meetings with potential beneficiaries. They just don't have the time! There are over 100 developing countries around the world with hundreds of thousands of biodiversity conservation and other organisations competing for the foreign charitable pound, dollar or euro.

When requesting a meeting with a representative from a potential donor organisation overseas, you are not only competing for space in his or her diary with fundraisers from South Africa and their own country, but also from the whole developing world! Even if you are able to set up a meeting, it would be rare for you to emerge with a promise of money, and you are unlikely to be granted time with a senior person in a decision-making role. The most that you are likely to achieve is a brief meeting with a relatively junior person who will give you application forms or their grant-making guidelines and explain the application procedure. This can be helpful but, in reality, is merely a step up from visiting a donor's website. Is it really worth spending the time and money on a foreign trip?

Foreign fundraising is generally about proposal writing. Biodiversity conservation NPOs' staff members do and should attend international conferences whenever time and budgets allow. Apart from participating in vital decision-making affecting the very survival of thousands of species, invaluable networking takes place during such opportunities and donor leads are obtained. However, the majority of donors will still require a funding proposal or the completion of their application forms.

5.6 INTERNATIONAL COMPANIES

Don't bother! South African NPOs are rarely successful in raising money from the international head offices of large companies. An appeal to, for instance, Coca-Cola in the USA, will result in a response directing the applicant to the Corporate Social Investment department of Coca-Cola in Johannesburg or the regional grants office. Companies not active in this country, and therefore not having a target market here rarely, if ever, donate into South Africa.

Many large foreign companies have grant-making foundations in the same manner as local companies do. Appeals to international corporate offices are often directed to their foundations from where grants are made or the applicant is referred to their South African office. Even requests for sponsorships for major projects with a global reach are best handled via the South African subsidiary's marketing department.

There are exceptions to all rules but it is rare that a local NPO will be successful in seeking money from foreign companies active in South Africa via their international foundations. Such requests will, in the vast majority of cases, be directed to the local office.

5.7 FUNDRAISING FROM AMERICA

Americans donate over \$2 billion outside the United States of America (USA) each year, particularly through foundations. Although there are hundreds of thousands of foundations and trusts set up in the USA for the purpose of giving away money, fewer than 1 000 regularly donate out of America. Only a few hundred give into South or southern Africa and only a handful give to biodiversity conservation. Many fundraisers obtain expensive directories of USA donors or spend hours searching the Internet for the information overload of large numbers of foundations, only to find that the vast majority of American foundations don't give outside of their city or state, let alone beyond their continent. Careful homework is therefore critical.

Section 501 (c) (3)

Myths and misunderstandings abound around the requirements of USA donors regarding Section 501 (c) (3) of the American Internal Revenue Service's regulations:

- It is not a law in America that NPOs (local or foreign) have to have 501 (c) (3) status in order to receive money from donors.
- It is advisable to have this registration, however, as it enables donors to apply for a tax rebate on the money given to 501 (c) (3) registered organisations.
- Few American donors, be they individuals, companies or foundations, will give to organisations if they cannot enjoy tax relief.

Costs

In the past, the only options open to non-American NPOs were to obtain legal help in the USA in the setting up of an American-based 'Friends of...' organisation with 501 (c) (3) registration to receive donations on behalf of the foreign NPO. This system still functions, but is costly. Setting up an American NPO costs about \$10 000. Ongoing work is required in the USA to receive, receipt, bank and forward donations. The American 'Friends of...' organisation must be registered within the requirements of USA regulations, all of which costs money. This system works best for large, non-profit bodies such as major universities. Registered organisations that actively raise substantial money in America can warrant having 501 (c) (3) registration and the costs involved.

Another option for South African-based biodiversity conservation organisations is to seek out as partners American conservation NPOs with 501 (c) (3) status to, legally and with minimum paperwork, receive donations on their behalf. The funds are in turn sent on to the ultimate beneficiary in South Africa. This system works but is reliant on trust and transparency and requires that the American partner organisation does in fact pass on the donation. Another downside is that some USA partner bodies request a 10–20% commission for this service—a bit excessive if one considers that all the fundraising work is done by the South African NPO.

The American Fund for Charities

The good news is the advent of the American Fund for Charities (AFC). This American-based 501 (c) (3)-registered non-profit organisation was set up for the purpose of accepting donations made by Americans taxed in the USA, for foreign non-profit organisations based outside of America. It is inexpensive to participate. Joining the AFC costs \$250. The fund takes only a small fee on each donation, based on a sliding scale of charges. See www.americanfund.info

Membership of the American Fund for Charities has motivated the donation of substantial amounts of money which would not have been donated had the donor not been offered the 'carrot' of a tax rebate for a large number of South African NPOs. It is vital to mention your 501 (c) (3) facility when applying to American donors.

Letter of enquiry

American funders are clear in the methods by which they want to be approached. Some, the minority, are happy to receive an application form or proposal as a first approach. However, the majority want a

letter of enquiry. This is a 1–3 page (maximum) letter stating succinctly what your organisation does and specifically, but briefly, what the project for which you wish to apply, entails. It is also vital to state in the letter of enquiry how much you would like to ask for. No enclosures other than a brief Z-fold or simple A5 pamphlet should be sent with the letter. It is important to mention your 501 (c) (3) status in the letter. Most American foundation staff members reading such letters presume, if no mention is made of 501 (c) (3) registration, that none exists, resulting in automatic disqualification.

The purpose of a letter of enquiry is to say very briefly:

- What your NPO does.
- Which project you wish to present.
- How much you'd like to ask for.
- That your NPO has 501 (c) (3) facilities.
- That you would like to obtain proposal guidelines and/or application forms.



Potential donors will, if interested in considering your NPO, send you their guidelines, which normally include the information that they want in proposals and details required as enclosures, or they will provide application forms.

By sending such a letter, you are effectively giving the donor the opportunity to tell you that they do not, in fact, want you to submit anything further. More and more American donors are allowing (and in some cases insisting on) an electronic or online letter of enquiry or brief form. It is therefore vital to research carefully all donors.

5.8 FUNDRAISING FROM THE UK

A number of large and medium-sized donor organisations in the United Kingdom (UK) have established and sophisticated grant-making programmes, donating millions of pounds abroad each year. In some cases, donors select regions as beneficiaries and allocate budgets for this purpose. Over two decades ago, the then UK National Lottery, now The Big Lottery Fund, launched an international allocation and today donates approximately £100 million each year outside of the UK.

However, having a UK-based charity partner is critical to receiving a donation. The UK partner is considered to be the applicant on behalf of its foreign associate organisation. The links are verified by the donor, with the British charity having its financial matters scrutinised and undertaking responsibility for the donated funds, which are given to the UK organisation, in turn, to pass on to the project overseas.

It is usually acceptable to donors that UK-based charity partners add on to foreign applications the costs of time spent by their staff, usually the accountant, in monitoring and reporting on the use of grants. This often entails visiting the beneficiary country. A fee of 10% is the norm.

Despite the fact that applications are formally submitted by the UK charity, which signs contracts and enters into agreements with donors, the information supplied and completion of application forms and drawing up of or providing supporting documentation, is done by the ultimate beneficiary (the South African NPO). The workload in such an exercise is enormous.

About 20% of UK funders do not stipulate the need for a UK-based charity partner and simply require copies of the applicant's constitution and proof of its registration as a non-profit organisation in its home country.

Multiple year grants

Some British donors are prepared to make three-to-five year commitments, a practice that is diminishing worldwide. At first glance it seems like a great idea: complete the necessary application forms or write

the stipulated proposal, prepare a business plan if required, identify and co-ordinate the presentation of a number of enclosures, answer the ongoing queries and, if all goes well, a commitment to donate money over three to five years is received. But it can sometimes result in a feeling of being locked into a programme with no flexibility. Biodiversity conservation is an ever-evolving field and one often has to respond to urgent and newly identified needs. Practical matters beyond anyone's control can affect the expenses of an NPO too. Escalating oil prices, world or local recession or natural disasters can all result in one regretting not having asked for sufficient money or having omitted a line item. In most cases, contracts are viewed by donors as rigid and written in stone, whereas others, notably The Big Lottery Fund, are amenable to being asked for additional money if the specific project that they are supporting has an additional clearly demonstrable requirement. See www.biglotteryfund.org.uk

The UK Fund for Charities

The same team who had the foresight to establish the American Fund for Charities, set up the UK Fund for Charities along the same lines. Non-profits worldwide can apply to become members of this Fund and most (but not all) UK donors are satisfied with this arrangement. In addition, the administrators of the UK Fund for Charities ensure that Gift Aid is claimed, thus efficiently ensuring that each UK donation becomes worth an additional 28 pence. Membership of the UK Fund for Charities is £100 to join and a nominal fee, based on a sliding scale, is made for each donation administered by the UK Fund. (Jill Ritchie, author of this handbook, is a board member of the UK Fund for Charities). See www.ukfundforcharities.org

Gift Aid

Gift Aid on donations from UK tax payers (be they individuals, trusts or companies) allows NPOs to take a donation (which is money on which the donor has already paid tax), and then reclaim tax on its 'gross' equivalent (its value before tax was deducted) at the basic rate. In practice, this means that for every pound donated to charity using Gift Aid, the beneficiary organisation can claim an additional 25 pence from Her Majesty's Revenue and Customs (HMRC). In addition, HMRC will automatically pay the charity a further 3 pence for every pound Gift Aid donation it receives. For every pound donated under the Gift Aid scheme, the NPO will receive 28 pence. Gift Aid can apply to one-off donations or to a series of regular donations.

5.9 FUNDRAISING FROM EUROPE

Raising money in Europe is simpler than doing so from the USA with its 501 (c) (3) requirement and the UK where donors prefer to give via a local charity. However, there are fewer foundations in Europe that donate in South Africa, which is no longer viewed as the priority it was during the apartheid era. Fortunately climate change has become of major concern to the Europeans and new avenues of funding are opening up, requiring ongoing potential donor research and monitoring. The majority of larger European foundations have websites but some sites are only in the language of the donor. A few have an English section.

Generally, European donor agencies have relatively straightforward application procedures—either completing their own forms or submitting your proposal. They rarely request an initial letter of enquiry. However, be warned! Some of their forms are lengthy. Language can also be a problem. With the introduction of the euro, all applications to EU member countries must be in euros. The primary sources of European donations are Germany, Holland and France. The Scandinavian countries substantially supported the anti-apartheid movement as well as NPOs caring for the oppressed, but few provide direct aid to NPOs in South Africa today.

Section 6: Sources of funding—individuals

By the end of this section, you should have:

- An understanding of why individuals donate money.
- Begun to consider high profile patrons or champions.
- Considered individuals as donors to your organisation.

6.1 WHY INDIVIDUALS GIVE

Why people leave bequests, why they volunteer, why they support certain organisations and not others, even the level and extent of their giving must be understood in order to plan the most appropriate methods of approach for each target market or source of support.

Individuals likely to support conservation can be largely divided into two groups—committed and passionate environmentalists and others, who, with ongoing awareness of the value of biodiversity and its threatened status, can potentially be ‘converted’ to ‘getting’ the importance of biodiversity conservation. It is, however, interesting to understand some of the reasons why people donate money at all, irrespective of the cause.

Tax deduction

The knowledge that their donations will be partly tax deductible is a proven motivator to people to give, as they are then in fact giving less but are credited with having given the original amount and the non-profit has the full benefit. The cause, however, remains the primary issue. Fortunately, conservation organisations in good standing with SARS, that apply to the Department of Finance can obtain registration in terms of Section 18A of the Income Tax Act as part of their PBO registration, and thereby offer donors a tax rebate.

Asked

The most common reason why someone is not a donor to a specific organisation is that they were not asked! And, conversely, the most common reason why people give is that they were asked. Don't forget to ask. Don't be uncomfortable about asking—asking someone to give is also about giving him or her the opportunity to give—the opportunity to make a difference in biodiversity conservation.

Availability of money

People give because they have something to give even though it might only be R10. Most people who care about conservation would like to support such work but not all have money available to give. The ongoing limited availability of most people's money is the reason that non-profits send out a number of ‘donor acquisition mailings’ in a year rather than restrict this exercise to an annual appeal.

Duty

Many people believe that it is their duty to help others and to support conservation for future generations where possible. Donations to environmental NPOs offer a vehicle for such support.

Custom/habit

A portion of the population has become accustomed to making donations. The habit of such giving is, for some, part of the natural order of their lives. This is good news for fundraisers! Although the reasons that motivate various people to give and become accustomed to giving include those listed on these pages, merely being in the habit of charitable giving is a positive factor that makes them more open to being approached by other organisations.

Affinity

Companies structure formal grant-making criteria and select the areas of involvement or sector (such as education, job creation or the environment) that they choose to support. Trusts often have the sectors they support written into their constitutions. Individuals also have their preferences, often influenced by their passions, personal experiences and areas of interest or concern. Individual donors will therefore give to organisations working in the fields of concern to themselves. In addition, they often support similar organisations. Someone concerned about climate change and biodiversity conservation may well donate to three or four environmental organisations.

Information

We live in the information age. Information Technology (IT) is now called Information and Communication Technology (ICT). By the very fact of being involved in biodiversity conservation, NPOs hold vast amounts of information. Access to such information can, interestingly, act as a motivator to people to donate to your organisation. Someone concerned about environmental issues may be open to donating to your NPO as your research, lobbying and projects are close to such a donor's heart. Via your newsletters, website or access to a private library, such donors can have credible up-to-date conservation information and knowledge about developments readily available. Opportunities to involve individual donors in projects invariably result in more donations as they become 'ambassadors' for your organisation and its projects.

The belief that their donations will help to alleviate a problem or make a difference

Corporate and trust donors have, generally, from the outset of such giving, been project-focused in their grant-making and have resisted funding running costs. Individuals also donate more readily when provided with options which tell them exactly what their donation will achieve, e.g., 'Your kind support of R50 per month will...'

Always offer the donor an open-ended giving amount. The early developments of direct mail forms with tick boxes often restricted potential donors to three or four options but capped the maximum amount. However, after noticing that a number of people selected the highest amount, the simple addition of an option such as 'own amount' or 'other' elicited unprecedentedly high amounts. This reinforced the proven maxim of fundraising that one should not think for the donor or presume how much someone is limited to giving.

Emergency

Donors are inclined to respond to emergency situations. The advent of 24-hour news channels such as CNN, Sky and BBC World have brought worldwide disasters into our living rooms—live. As technology continues to develop at a breathtaking rate, it brings real time news onto our computers and cell phones too. The urgency of a situation, coupled with the belief that their donation is needed (for the disaster) and that it will make a difference, motivates many people to give—often people who don't ordinarily support charitable causes. The challenge for fundraisers from biodiversity conservation organisations is to nurture such one-off donors in order to grow lasting relationships.

Hope

Largely, what fundraisers sell is hope—hope that problems (even if almost insurmountable) can be solved. People are seeing more and more media reports on the disastrous results of climate change and on the loss of natural areas. They give money to non-profit organisations in the hope that their donations will address these issues. Many feel that there is little that they can do about serious conservation crises (other than to live as environmentally friendly a lifestyle as possible) but that by making a donation to an organisation actively working in the area, they are supporting the hope that biodiversity will be conserved.

With cycads having been declared the most threatened group of organisms on the planet at the 10th Conference of Parties to the Convention on Biological Diversity in Japan in 2010, and South Africa having 39 species of cycad, appeals to individual donors could be centred around the hope of saving these from further extinction.

In addition, the necessity to lobby for legislation banning the trade in large cycads and to create public awareness of their plight (more endangered than the white rhino) could form the basis of an emergency fundraising campaign as it would enable the added benefit of media awareness.



Donor recognition

The ‘what’s in it for me?’ factor is a motivator to give for some people. Maslow identified in his hierarchy of needs, the human need for recognition. Offering donors public recognition definitely motivates some to give. Satisfying egos is part of fundraising. Tasteful donor recognition strategies, in line with the size of gifts, should be part of all fundraising planning. Be careful, though, not to place too low a value on, for instance, naming rights on a building, trail or park.

Fear

Fear, sadly, is a motivator to giving. People fear so many things, from death, poverty and illness to suffering the results of climate change. Although it does not feel healthy and wholesome to a fundraiser, scare tactics can work in fundraising letters. ‘If we don’t raise the money to do X, Y could/will happen.’

Venting frustration

Interestingly, research worldwide has shown that some people are driven to give money to a lobby group or organisation addressing a need that angers them. Therefore, anger can be a motive to give. Anger at the unfairness of people or animals’ suffering as a result of the ravages of environmental degradation, anger at the slow pace of people understanding and supporting biodiversity conservation or anger at how small an amount is budgeted for provincial governments’ environmental departments, can elicit a, ‘Yes! I’ll support this NPO because at least they are doing something about biodiversity conservation’.

A sense of values

In a world that has largely lost its way, some donors are inclined to support organisations devoted to their values—the things they hold dear. Such values differ from person to person but a growing number will support biodiversity conservation as they begin to understand the impact on their own lives. People who donate motivated by their own values, may often support less popular causes if they care about them, which opens a targeted pool of potential donors, albeit a small group.

A sense of community

Many people need to belong—be it to a family, club or grouping that works for them. The sense of ‘belonging’ to a group of like-minded people can often motivate people to donate. This sense of community can extend beyond the shared connection with people who care about a cause (biodiversity conserva-

tion) to a feeling of connectedness to people whom they admire (an excellent case for organisations to have high profile patrons).

A way to help

Whether in response to a disaster or merely because people care about an organisation's mission, goals and objectives, many will give as the only way they know to help. Sending money is what most people can do. Few can take weeks away from home and/or work to clear alien vegetation, clean up beaches or rivers or help in cases of disasters. Few have the time, abilities or facilities to render hands on help to people, plants or creatures in danger. For the vast majority, giving money is a way (often the only way) that they can help.

Be focused

The reasons outlined above are intended to show some of the array of issues that move people to give and not to cause confusion. The tone, feel and structure of each e-mail, Facebook post, tweet or letter of appeal will vary according to the organisation or conservation project carried out. Always remember that it is the work (the projects) of an organisation that donors fund and not the NPO itself. Therefore, focusing on the beneficiaries will help one to craft the various letters required to motivate individual support.

Time-consuming but beneficial

Fundraising from individuals is time-consuming. It takes a substantial amount of time to manage individual donations (issue receipt, thank, update records). The upside of having a large pool of individual donors is the fact that it is primarily from this group that NPOs receive bequests. In addition, individual donors are 'ambassadors' for the organisation and cause and will generally support fundraising and other events. Some may volunteer and they are likely to influence others to support the organisation.



Exercise: Identify champions for your organisation

- Research via the media, Internet and by talking to people within your organisation to identify high profile people such as entertainers, sports stars or respected academics who have expressed their concern about the need for conservation.
- Plan to approach them (with your board's permission), to act as a patron or champion for your organisation and its work. High profile people may be local or international.
- Consider too how you would best utilise their support (on a quality and not quantity time basis).



Exercise: Developing communication materials for individual donors

Taking into account the various factors that motivate individuals to give to NPOs, considering your projects, begin drafting letters to targeted groups of people.

- What can you use to grab their attention, to 'hook' them in?
- What's in it for them? What can you offer potential donors? By thinking this through (it may largely be a 'feel good' factor), your letter will appear less desperate and less like begging.

6.2 EVENT FUNDRAISING

Staff and volunteers often vow 'never again' after each fundraising event. They can be exhausting, stressful and outrageously time-consuming and often with less net profit than can be raised from one successful application to a corporate or trust donor. Then why do we do them? There are other benefits in addition to money raised.

New donors

The donor base, whether consisting of individuals or corporates, is increased when people attending events learn about the work of the NPO. People find themselves at events through a variety of ways. They may have been taken along as guests accompanying supporters. Their company might have bought tickets and given them to staff members or even requested employees to attend. The event itself might have been the attraction.

Names from ticket sales

Events can raise the profile of an NPO. Having a well-known person attend and having media coverage of his or her speech can create awareness for the organisation and conservation. Events timed around international days, weeks or months to highlight a certain issue can have added publicity spin-offs.

Marketing benefits

People are more likely to support an NPO about which they are knowledgeable—from making spontaneous donations following a lottery win or any other windfall, to favourably considering a request for money, or even nominating the organisation as the beneficiary of a bequest. Media coverage generated around events has strong marketing benefits.

Events also afford NPO staff, volunteers and board members the opportunity of getting to know donors and supporters, and of nurturing and growing such relationships. The converse is also true. Existing donors enjoy attending fundraising events to hear of the progress of an NPO, its developments and plans and success stories. After all, they have a stake in the organisation as its funding partners. It is their money that enables the very existence of the NPO. The sense of 'family' must be nurtured. An event can be just such an occasion.

Section 7: Developing a funding plan

By the end of this section, you will have:

- An understanding of the importance of planning all aspects of funding.
- Realised that funding planning is broader than just fundraising planning.
- Been better prepared to undertake the planning to resource your NPO.

7.1 WHY NPOS SHOULD HAVE A FUNDING PLAN

- To raise and generate money.
- To increase awareness of the NPO—brand recognition.
- To prevent funding crises.
- To be prepared for as many eventualities as possible.
- To grow contacts/network.
- To enable monitoring and evaluation.
- To highlight areas needing improvement—early.
- To keep the team focused.
- To ensure appropriate written materials and budgets.
- To enable internal communication (board, staff, volunteers).
- To prioritise.
- To impress everyone, including donors.
- To have a roadmap/basis from which to carry out all fundraising and marketing tasks.

All the above are good general reasons that an NPO should plan, yet apply equally to fundraising planning too.



If you fail to plan, you plan to fail.

This maxim is both well-known and true. Ironically, the harder, more complicated and daunting the planning process is, the more vitally the plan is needed. A lack of funding and poor prospects of future funding put NPO staff members and volunteers into crisis management and survival mode with no time to consider the future. Just finding the running costs for the next three months can be so daunting that there is no energy left to consider where the organisation is going to be in three years' time. All thinking is then dictated by how things were done in the past rather than on how things will be done in the future—the very essence of planning. Sounds like a classic catch-22 situation, doesn't it?

7.2 PREPARING TO PLAN—KNOW YOUR NPO'S NEEDS

In order to embark on planning to fund your organisation, it is vital to be clear on its needs and how much money is required:

- Projects.
- Core/running costs.

- Endowment fund.
- Capital: equipment/buildings/vehicles.
- Other: conferences/travel.
- Expansion.
- Sustainability.
- Unforeseen/emergency needs.

Planning to plan

Sadly, too many funding and fundraising plans are hastily compiled when a shortfall or funding crisis is faced. Such hurried plans are, all too often, not clearly thought through. Failing to plan carefully and well in advance is generally interpreted by donors as the organisation not being well run or well managed, with the ultimate accountability for this resting with the board and senior managers.

A good funding (note—not just fundraising) plan should include goals and objectives for each aspect of the plan. These should also indicate who will be responsible for each activity, the time frame, deadline and expenses involved as well as a budget.

It is important to plan in sufficient depth. Having clear action steps is therefore vital. A good plan should cover the following questions per fundraising or income-generating activity:

- When will the activity take place?
- Who will carry it out?
- What will it cost?

Sources of funding

- Have your current funding sources been identified and evaluated?
- Can current sources be maximised?
- What other potential sources should be pursued?
- What does your 'funding mix' look like? Do you have a broad base of donors or only a few, irrespective of the amounts that they give?

Remember to plan for:

- Short term needs—immediate.
- Medium term—primary focus of plan.
- Long term—realistically.



Figure 10.—Action plan .

In order to implement the numerous activities required to begin the process of raising funds to/for and address medium and long term financial stability, a plan of action is outlined.

(Laid out simply in the interests of acting as an easy point of reference, the action plan should be updated on an ongoing basis, adjusted where and when necessary and tasks achieved noted.)

Funding action plan

[illegible]

Flawed funding plans

An informal survey conducted for this handbook of why many NPOs' funding plans have failed over the years, revealed many similarities:

- Board members did not participate in the planning process, approve the plan or assist in its execution.
- Too few potential sources of funding identified and pursued.
- Lack of clarity on stakeholder interest/connection—who should be funding us? Why? Why are they not?
- Planning began too late—too short a time frame allowed.
- Lack of team (staff/volunteer) capacity—too few people or skills lacking.
- Plan was a dream—not possible, practical, achievable.
- No budget, too little budget—you often have to spend money to make money.
- The NPO, project or plan not held in high regard by potential donors—or not deemed necessary or a priority.

- Competition for donor funds—economy, natural disasters.
- Lack of marketing.
- Lack of sustained marketing.
- Wrong methods of donor approaches.
- No monitoring and evaluation of the funding plan built in or carried out.

7.3 THE COMPONENTS OF A FUNDING PLAN

The layout and structure of a plan to fund your organisation for the coming year, or two or three years, can be compiled in whatever manner you prefer. It should, however, not be restricted to fundraising alone—challenge yourselves to consider ways in which money can be earned. Donations in kind of products or services (saving you the money you would otherwise have spent on these) and volunteer time rather than additional salary expenses should also be investigated. The following list should help you to select the factors that you feel would be relevant to your conservation organisation—don't neglect marketing opportunities whilst seeking other support!

- Clearly demonstrable need.
- Consensus that plan and funding are needed.
- 'Buy-in'/support from all.
- Risk assessment and management (e.g. impact on other funding).
- Methods of communicating/asking.
- Media coverage.
- Donor relationship management.
- Donor recognition (e.g. naming rights if applicable).
- Donor and other research techniques and strategy.
- Fundraising techniques with a brief action plan for each.
- Identifying stakeholders (potential donors, suppliers, volunteers).
- Equipment and technology required.
- Income generation.
- Monitoring and evaluation of plan.
- Time frames.
- Roles and responsibilities.
- Plan B—'what if?' scenario.
- Staff to fundraise (paid, volunteer or outsourced?).

Structure of narrative fundraising and income generation plan

The following is a suggested structure for writing up a plan to fund your organisation, generally becoming known as a resource mobilisation plan. It could be done entirely as a table or logical frame or even a mind map. Use whatever layout you are most comfortable with. Be innovative and just do it! Prepare a document that will form the basis and guide the resourcing of your organisation.

- Introduction/background—past funding successes and difficulties.
- Update on previous funding plan.
- Current status—committed funds.
- Budget—detailed amounts required.

- The projected funding needs:
 - Short term/immediate.
 - Medium term.
 - Long term.
- Constraints and positive factors—refer to SWOT analysis from strategic and marketing planning.
- Fundraising team structure if applicable.
- Methods of funding/fundraising.
- Potential sources/donors.
- Implementation:
 - Who is going to do what?
 - How?
 - When?
- Survey (capital campaigns).
- Donor/partner recognition.
- Marketing/PR—coordinate with marketing plan for maximum benefit.
- Monitoring and evaluation of funding progress.
- Risk management (what will happen if targeted amounts are not sourced?).
- Action plan.



Given how many changes and unforeseen needs we often have to respond to and the restrictive nature of corporate and trust funding, our funding planning resulted in a decision to focus our income efforts on expanding our events. We decided to introduce Mega Bike rides in addition to our successful Mega Hikes.

We did, however, also resolve to retain and nurture our relationship with the Table Mountain Fund. This is a most erudite funder that understands conservation and the specific issues that we face. We also have an American donor whom we can rely on and communicate with as and when things change and urgent needs occur. Our best advice is for organisations to find funders prepared to back something new, as that is so often what we have to address in biodiversity conservation.

Eden to Addo Corridor Initiative



We find that there is often a brief window in which to prepare a proposal or complete an application form. We therefore keep updated proposal material written up, per project, in order to adapt it in a hurry so as not to miss a funding deadline.

ECPTA/FOBWA

Figure 11.— Income sources for NPOs.**1. Foreign donors:****a) Outside the country**

Governments
Government-funded agencies
Foundations or trusts
International aid agencies
Faith-based groups

b) Inside the country

Foreign missions
Government funding agencies
Foundations/trusts' local offices
Corporations' local offices
United Nations/EU agencies

2. Businesses:

National corporations
Publicly owned companies
Medium sized businesses

SMMEs
Privately owned

3. Local Foundations and Trusts:

Funded by government
Privately funded

Funded by corporates
Funding NPOs

4. Government:

Grants for services
Subsidies
Tenders

National
Provincial
Local

5. Institutions:

Faith-based groups
Service clubs

Schools/tertiary institutions
Interest groups

6. Individuals:

Active donors
Prospective donors
Members or subscribers
Board members and staff
Volunteers (including foreign)
Clients/beneficiaries/audiences
Via internet and e-mail

Family and friends
Particular geographic areas
Tourists
Alumni
Bequests
Via events
Staff/payroll giving

7. Fees for services:

Beneficiaries

Clients and customers

8. Income generation:

Clients and customers

Social entrepreneurs

9. Sponsorship:

Cause-related marketing

Joint promotions

Section 8: The importance of marketing in the funding mix

By the end of this section, you will have:

- An understanding of what marketing involves.
- Realised why marketing is vital to your organisation.
- Learnt how to structure a marketing plan.

8.1 INTRODUCTION

Marketing is not restricted to the business world. The majority of successful non-profit organisations have applied the principles and practices of marketing to strengthen their NPOs' name (brand) and reputation (goodwill equity), resulting in much funding success. The inclusion of the term 'marketing' in the title of this guide attests to its critical function in the ongoing resourcing of biodiversity conservation organisations.

In business, a marketing strategy is considered a critical component of a company's success. Without successful marketing, sales dwindle, resulting in brand failure and ultimately, the closing down of a product line or an entire business. The full potential of marketing, grasped by the business sector, is sadly rarely understood in the not for profit world. Yet, the ongoing success of NPOs depends increasingly on the presence of a purposeful marketing plan worked into the organisational operating strategy—on getting one's messages across in a clear and succinct manner, and being noticed by one's target audiences despite a competitive environment with an array of other messages vying for your audiences' attention.

Marketing has at times been confused by those unfamiliar to the field, with sophisticated forms of advertising. This notion must be dispelled. Advertising is but a small field within marketing. Marketing constitutes far more than choosing where to advertise. If one's understanding of marketing is limited to the narrow interpretation of advertising, money will be wasted and underachievement of potential marketing returns will be the likely result.

Cases in which NPOs have struck out boldly and marketed their goals and work successfully by communicating positive, exciting messages and developing strong brands, have resulted in massive brand awareness and public trust and esteem of the organisation, resulting in much volunteer action and funding success during focused fundraising and awareness appeals. WWF's Earth Hour and Greenpeace's ongoing campaigns attest to this. These organisations did not rise to fame as a result of one-off appeals, but rather through well-planned, ongoing, integrated, strategic marketing-communications and media relations, resulting in positive exposure and purposeful positioning. Only when the non-profit sector begins to take marketing seriously, will it see the kind of growth needed to ensure its sustainability.



Definitions abound:

- Marketing is the action or business of promoting and selling products and services.
- Marketing is the process of planning and executing the conception, pricing, promotion and distribution of ideas, goods and services to create exchanges that satisfy individual and organisational goals.
- Marketing is the art of making someone want something you have.

Whichever definition you relate to best and feel can be translated to your organisation, is a personal choice. The most basic principle of marketing is that it encompasses all steps required to offer a particular product or service (think biodiversity conservation and your specific project/s), making potential supporters excited about it and moving them to action—to donate, volunteer or lobby.

Successful non-profit marketing therefore entails:

- Understanding the essence of your organisation.
- Capturing it.
- Constantly, passionately conveying it.

Marketing needs to be understood in an even broader sense: every time your organisation has contact with the public, positive or negative marketing messages are conveyed, which ultimately influence the public's decision to support your organisation or not. It may be in the form of an employee being rude to a group of learners on a volunteer programme, a vehicle bearing your logo illegally parked or being driven recklessly, a clean office lobby with someone friendly welcoming guests, or a series of informative newspaper articles and online blogs enlightening readers on relevant topics. Positive or negative, messages are constantly conveyed to the public and good marketing management ensures that only the messages you want conveyed are the ones that are remembered.

We recognise that marketing is one of the most important things that we should be doing all the time. As we have no budget for formal/professional marketing, we currently focus our marketing on our donors and the local communities within our biosphere. With our donors, our marketing strength remains the credibility that we have built up by how carefully and successfully we spend their money. We are aware that our stakeholders are watching us all the time!

CWCBR



8.2 BRANDING

The process of according attributes to a product or organisation is known as branding. It is an important element of marketing, as there is keen competition in every sphere. The 110 000 NPOs in South Africa, a percentage of which are also engaged in environmental work, including biodiversity conservation, are essentially your competition, going after the same donor funding and public recognition/goodwill as you are. It is essential that your organisation stands out from the crowd in order to win the hearts of your targeted audiences.

Having established your organisation's brand image, the next task is to define your Unique Selling Proposition or Unique Selling Point (USP). This is your fundamental point of differentiation from your competitors' brands and it is this unique attribute that will ensure that members of the public consider your organisation to be special and above average. In non-profit terms this means having people, companies, trusts and government (all staffed by people) supporting an organisation on many levels and having it 'top of mind' for:

- Donating.
- Volunteering.
- Feeling a sense of belonging (membership).
- Mentioning it positively whenever appropriate.

Conservation NPO staff, board members and volunteers who believe that marketing is something that belongs only to the rarefied atmosphere of commerce and industry, are mistaken. The practice of marketing communications is as important to the growth of this industry—NPOs, CBOs and quasi-state biodiversity conservation initiatives—as it is for the profit-driven sectors of society. The non-profit sector must take marketing seriously in order to secure its long term viability, ongoing recognition and funding.

8.3 TACTICS

In order to decide on and carry out successful marketing tactics, you must have a sound understanding of your organisation, its mission, vision and projects. Marketing strategy is born out of organisational strategy. The marketing function is one of the many essential elements through which an organisation achieves its overall objectives.

Critical to choosing tactics, is understanding both your existing supporters and those who could potentially support in every way (don't only think of money). Non-profit marketing is about going 'deep' rather than 'wide' in terms of reaching targeted audiences. Few NPOs have the resources to embark on large, expensive, televised advertising campaigns that reach many but target few.



Exercise: Analyse your support base

The answers to these and similar questions are needed in order to arrive at clear marketing goals and objectives (while keeping in line with your NPO's values, vision and mission) and the development of a marketing strategy.

- What influences your donors, volunteers and other supporters?
- Who are they?
- Where do they spend their time?
- Why are they donating to or helping your organisation as opposed to others involved in biodiversity conservation?
- What do they like most about your organisation?

8.4 MARKET RESEARCH

Market research is generally considered to be what companies do, undertaking surveys to establish what toothpaste, washing powder or soft drink people prefer and why. Such research in fact goes far deeper and broader and should be applied to non-profit organisations too and should not only be outwardly focused. Start within your NPO. Analyse all that your organisation has done to date. A SWOT analysis (as outlined in Section 2: Strategic Planning) works well for this. A confidential questionnaire can be given to staff and volunteers to complete (do not forget board members, they are your senior volunteers). Ask questions about the organisation, its projects, its policies, its performance and values. There are no right or wrong questions to include. What do you want to find out? This will determine what you ask. People, internally and externally, could be asked to complete an online questionnaire if that is easier. Staff and volunteer meetings can be held to identify how people feel about all aspects of the organisation—effectively a group SWOT exercise with focus groups.

Your market research should be aimed at learning as much as possible about your key stakeholders. First, identify them and group or segment them to better enable quality research. These groups of stakeholders may include:

- Existing donors.
- Potential donors.
- Members.
- Beneficiaries or clients—individuals or communities living within the area in which you work.
- Volunteers.
- Visitors (e.g. participants on hikes).
- Board members.
- Staff.
- Government representatives.
- Other groups involved in biodiversity conservation.
- The media.

Points to bear in mind when compiling a survey

- Keep it short. People are more likely to complete a shorter questionnaire. Aim for five to ten minutes maximum. Tell people up front how long it will take.
- Be clear as to the purpose of the survey. What exactly do you want to achieve? Do not try to cover too much in the survey.
- Plan the size of the sample. Will you aim it at a percentage of the target group and if so, how many will this entail? Ensure that the sample is sufficiently random to give you a good picture of the larger group's feelings.
- Assure respondents of their confidentiality otherwise you are not likely to achieve accurate findings.
- Plan evaluation and feedback. Ensure that the findings are carefully analysed, problems addressed and that survey participants as well as other stakeholders are advised of both the survey results and changes implemented as a result.

What are others doing in the area of biodiversity conservation?

When planning to market your organisation, you must know what others are doing in the same field. There are occasions when organisations involved in biodiversity conservation will network and cooperate on projects, which is right and proper. However, they will also be constantly competing for market share: money, media coverage and voluntary support. It is therefore vital to be aware of other groups' activities in order to plan accordingly. Donors, for instance, dislike unnecessary replication and endorse and support collaboration.

8.5 SWOT AND PEST—THE STARTING POINT OF YOUR MARKETING PLAN

No, this is not about goggas! Apply the tried and tested SWOT analysis to your organisation, including its projects. Follow this with a PEST analysis. The SWOT deals with elements within the organisation and its specific field, while the PEST looks at broader external elements in the organisation's operating arena.

SWOT Analysis—Marketing

Ensure that the SWOT analysis is as inclusive of as many issues pertaining to your organisation as possible, otherwise it will be incomplete and therefore flawed in giving you a true picture on which to base your marketing plan. The purpose of the SWOT analysis is to determine the overall objectives of your marketing plan and thereby determine what your marketing strategies and tactics will be. A potential threat may be a limited marketing budget. Creativity and innovative ideas may need to be sought and reflected in the tactical plan. But remember that good marketing is about having the basics in place: a competent person answering the phone well and taking a clear message, a functioning website that has this year's upcoming events on it and not those of 2006!

Exercise: Analysing your organisation

In order to analyse your organisation to identify your marketing needs, work through the following questions:

- What marketing practices are working and simply need maintaining?
- What, if anything, requires urgent damage control?
- How well known is our brand within and outside of conservation circles?
- Do we know the public's perception of our organisation?
- Are we attracting new individual donors each year? Why or why not?
- Are we attracting corporate donors?
- What has been their feedback to our funding and sponsorship requests?



Once you determine what needs to be done (your marketing objectives), you can go about deciding how to achieve them (strategy) and then pinpoint specific tactics (*who will do what, when, where and how—with what resources*). Don't worry if there is a good deal of overlap between your fundraising and marketing requirements, there ought to be. The two compliment and support each other. Successful marketing enables successful fundraising.



Exercise: Identify your NPO's strengths to aid marketing planning

- What is your USP?
- What advantages does your organisation have over others active in biodiversity conservation in your geographical area?
- Where does your expertise lie?
- What do your surveys reveal that your various stakeholders see as positive attributes of your NPO?
- What do your staff, volunteers and board members like most about your organisation?



Exercise: Identify your NPO's weaknesses

- What causes most complaints from your various stakeholders?
- What problems are you facing?
- What do staff and volunteers find most challenging about being involved with your organisation?



Exercise: Identify opportunities for your NPO

- Are there any external factors that could be used to the advantage of your organisation?
- Is there significant tourism in your area?
- Is there an opportunity for guided tours, trails or hikes or product sales that would boost income and increase the publicity of your organisation?
- Are there any strengths that could be maximised to further benefit your organisation?



Exercise: Consider the threats to your NPO

- Can any threats be addressed and turned into opportunities?
- What about your competition; other NPOs in biodiversity conservation? (Note: although everyone involved in conservation should network and cooperate, NPOs in the field are in competition for funding, volunteer help and media coverage)
- What are they doing well?
- Why are people supporting them?
- What can you learn from their successes?
- How can you avoid their mistakes?
- What is happening externally that is or could negatively affect your NPO?
- Is your organisation facing threats from within?
- If so, what can be done to address them?
- What are you not doing well?

The PEST Test

Follow the findings of the SWOT analysis by looking at these in aspects of the broader environment: Political, Economic, Socio-cultural and Technological (PEST). Some people are in the habit of including these factors in their SWOT exercises. It is, however, generally better to treat them separately. A PEST analysis is a simple, useful and widely used tool that helps you to understand the big picture affecting your organisation. It is used by business and NPO leaders worldwide to build their vision of the future.

By making effective use of a PEST analysis, you ensure that what your organisation is doing is aligned positively with external forces of change. By taking advantage of change, you are more likely to be successful than if your NPO's activities oppose it. Good use of a PEST analysis helps you avoid taking action that is condemned to failure from the outset, for reasons beyond your control. Use of a PEST analysis helps avoid unconscious assumptions, and enables adaptation to the realities of situations. This is particularly relevant to organisations involved in biodiversity conservation as, by knowing the external forces at work, staff and volunteers have a clearer picture of the level and extent of the marketing required, which may include a strong aspect of public awareness, mindset change and lobbying for legislation change.

Political

What are the political factors affecting, or that could affect, your organisation and/or your projects? For example, how important or serious would a change of political party in your province or town be to your work?

Economic

The worse the prevailing economic climate, the harder it is to fundraise and, therefore, the more important to market all aspects of the organisation. It is, however, vital to understand why certain economic factors affect an NPO. For instance, when interest rates are high, people and companies have less to give away but trusts earn more via their investments, as do wealthy individuals living on investments. Ensure that you understand the implications of a strong versus a weak rand, as both have different merits.

Socio-cultural

Factors to be considered include population growth rate and demographics, peoples' health, education and social mobility and levels of employment. This may also cover media attitudes to biodiversity conservation, public opinion and belief systems. Lifestyle choices and people's attitudes to these must also be taken into account.

Technological

Consider the impact of emerging technologies, positive or negative, on your work. This includes such things as assessing the impact of Internet accessibility, reduction in communication costs and increased trends of remote working. Advances in research findings would also fall under this topic.

8.6 THE MARKETING PLAN

Having assessed all factors impacting on your organisation, you should then embark on your own marketing plan. The following should be of help in guiding the structure of your plan:

Marketing objectives

What do we want our marketing activities to achieve?

Marketing strategy

How will we achieve the above marketing objectives?

Product—projects to be funded, the cause to be supported, events, product sales.

Price—funding required per activity (amounts to be requested per ‘product offering’).

Place—who to approach, where (corporates, trusts, online campaigns to individual).

Promotion—how we will communicate with our targeted donor segments.

Marketing tactics

Who will be involved in carrying out the strategy? *What* will they each do, *by when* will they do it, *how* must certain/specific tasks be carried out to maximise success?

Competitor analysis

How are our competitors doing their marketing?

Methods of success analysis

Measuring, evaluating and analysing results to plan for the next year, is important.



We have a website. However, we're a young organisation with only three full time staff members and have not yet undertaken any major marketing initiatives. We have used the opportunity of engaging with participants on our hikes to help us to roll out marketing. We sell them branded caps, bandanas and other attractive items which they wear afterwards too. They tell us that wearing these items causes people to ask about Eden to Addo. They act as walking advertisements.

We have had our hikes (and thereby our organisation) featured in a number of leading magazines as we invite journalists to participate on the hikes. We call it ‘getting people into the conservation world in camouflage’. They think it's sport, but they are in fact being positively exposed to biodiversity conservation and we are gaining many ‘converts’.

Eden to Addo Corridor Initiative



We've ensured that the container made for our honey complies with industry standards. Coincidentally, the landowner/partner's family crest includes a beehive. With the help of marketing professionals, we have ensured that the honey jar label is suitable for our target market. Although we will only begin to market the honey, and thereby the project in 2011, we are developing a marketing strategy that emphasises the various impacts of health benefits to the consumer, biodiversity conservation of the area and the social impact of an income for impoverished local residents.

Beekeeping project—FOBWA

Section 9: Fundraising proposal writing

By the end of this section, you will have:

- An understanding of the importance of thorough planning and preparation before writing funding proposals.
- Clarity on project budgeting.
- Been challenged to think creatively in order to demonstrate in your proposals benefits to both biodiversity and people.
- A suggested template for a proposal.
- An understanding of the concept of a letter of enquiry.

There are three ways that organisations apply to companies and local and foreign trusts for money:

- Completing an application form.
- Compiling a funding proposal within donors' guidelines.
- Writing your own proposal in the absence of the donor having a form or guidelines.

Don't be confused by some, particularly major donors, who require a letter of enquiry, concept paper or 'first application'. These are not actual requests for money but early elimination options devised by donors to save both non-profit organisations and themselves time by having a brief first form of contact in order to gauge whether the project and organisation are in line with the donors' interests.



9.1 DRAFTING A FUNDING PROPOSAL

More and more (but not all) donors are prepared to accept proposals and application forms electronically. In some cases, even if they are happy to receive them by e-mail, they still require them posted as they may want original and signed copies of documents such as your constitution or audited financial statements. Irrespective of whether your proposals will be posted or e-mailed, they are referred to in this handbook as the pack of documents to be compiled and submitted to potential donors.

It is suggested that, once you are clear on the project for which a proposal is to be written up, you compile the documents for the pack to be sent to donors in the following order, which is the same sequence in which this section is ordered:

- Budget.
- Proposal narrative.
- Proposal cover or title page.
- Enclosures or appendices.
- Index or table of contents (optional).
- Covering letter.

Plan

Plan, plan, plan—always. Plan proposals well. Be sure what project is to be presented. Be specific in your request. If you have been asked to write a proposal for a project offering skills and knowledge transfer for sustainable land management in a specific area, say a 10km radius around Swellendam, then focus on

this and don't try to spell out all the threats to the entire Cape Floristic Region in one proposal. Keep proposals as short as possible but don't neglect important information.



It is easier to fundraise for a social priority with a biodiversity spinoff. The more you improve people's quality of life, the less they will exploit the land in a harmful manner.

ECPTA/FOBWA

9.2 THE BUDGET

Always work backwards from the project budget. Be certain that you know exactly how much money is required and what it will be spent on. You, as the fundraiser, must be comfortable with the budget. You are the one who will have to defend it. It is not generally the task of the fundraiser to draw up the budget but, in the case of a small organisation, a few of you may be required to multi-task. In large organisations compiling a project budget is the responsibility of the accountant, usually in conjunction with the project or programme manager, but you, the fundraiser, must agree with it. If you don't, say so early.

Don't submit a proposal to a potential donor, accompanied by a budget that you feel to be wrong in some way, and, when you are placed in a difficult position of having to answer valid queries, go back to your management team with 'I told you so'. Everyone concerned must 'buy into' the budget from the outset. Donors to biodiversity conservation projects, as with any other societal need, know the average costs of a project and will quickly notice if your budget has unusually large line items. They are also good at identifying missing expenses from a budget. For instance, salaries might be omitted from a budget, not by accident but due to the project being entirely run by volunteers. Be prepared for any queries from potential donors.

The project budget will instantly determine the credibility of your organisation in the mind of the potential donor. It shows how much you plan to spend, how much you have already raised towards a project, how much you do for yourselves by way of events and income generation and how you arrived at the figure that you are asking for. Above all else, budgets show transparency. An organisation that lays open for a potential funder its financial plans, immediately appears not to have things to hide. Budgets must be factual and all figures must be provable. If you are requesting money for the purchase of a specific item, enclose a quotation from potential suppliers.

A budget (whether for a project or the organisational budget) is a 'plan of action'. It represents the organisation's guideline for the coming year, expressed in monetary terms. This means that an NPO has to have specific objectives before it can prepare a budget. Most donors feel that an NPO that does not know where it is going, does not deserve funding. If you have any co-funding secured, show this in the budget—it will impress potential donors. Budgets are included with the proposal examples at the end of this section.

When preparing a project budget, only those direct costs related to the carrying out of the specific project should be recorded. The line item 'salaries' for example, would be only those salaries of the particular people involved in the project and not administrative staff members' salaries. An exception would be if someone (usually a senior person such as the CEO) spent part of his or her time carrying out an aspect of the actual project. If so, that percentage of his or her time could be calculated into the costs of the project. Do not fall into the trap of simplistically dividing all the overheads of an organisation between its projects.

Corporate and trust donors concede that projects cannot operate in isolation and must be supported by organisations. In response to NPOs' ongoing lament for support for core costs, companies and trusts have generally agreed that organisations may include 10% of the costs of a project towards the overall costs of running the organisation.

The first step when receiving a budget is to think like a donor.

- Is there an expense that could be avoided through a donation? If so, set about finding the item or service at no charge.
- Once you are happy that the budget will withstand scrutiny, analyse the potential donor pool.
- Which companies or trusts have set the precedent of giving to similar biodiversity conservation projects?
- Read annual reports and look at websites of other conservation NPOs.
- Set up Google alerts to advise you of potential funding opportunities in your geographical area or within an aspect of biodiversity that ties in with your work.
- Companies too produce reports on the work of their social upliftment support. Visit their websites for details of their corporate social investment grant-making criteria.
- Always remember that it is shareholders' money that companies give away.
- Projects appeal to donors when they can show that they increase unskilled, unemployed people's access to skills, knowledge and technology as well as socio-economic opportunities. This creates exciting funding opportunities for projects that address social needs while conserving biodiversity and can thereby bring donors on board whose stated interests are, for instance, skills training, land reform or food security and who did not previously see themselves as funding environmental programmes.
- Plan whom you intend to approach and for how much.
- Donors will ask you where you intend to find the balance of funds required, should they fund a part of your budget.



Exercise: Identifying possible donations in kind

- Study your projects' budgets and list possible items or services that you might be able to obtain as donations in kind.
- Seek suppliers to approach for these.



Funding proposals are generally written in the third person—'the organisation' rather than 'we'.



Tips on making written proposals more reader friendly

- Edit, edit and re-edit.
- Try to reduce the number of words—one can often shorten a proposal by a third or a half and not lose any significance or impact.
- Break up lengthy paragraphs and give them headings.
- Use text boxes to illustrate a vital issue.
- Use bulleted points.
- Ensure that the proposal does not contain any lengthy sentences.



9.3 PROPOSAL

The written or narrative 'body' of a funding proposal does not have to follow a rigid format. Fundraising is an art rather than a science. Different trainers and guide books will advise on various proposal formats. In addition, some fundraisers are influenced in their preferred method of compiling proposals by having

done so within certain donors' requirements. Don't be confused! Find the layout or template that works best for you to present, in writing, an introduction of your organisation, an explanation of the conservation problem or need and your suggested solution—your project. It is also strongly advised that you include an explanation of how you will monitor and evaluate the success (or otherwise) of the project—of whether the status of the threatened biodiversity and, where possible, local communities' sustainable livelihoods—have been improved. The following is a suggested format for a basic funding proposal. See proposal examples at the end of this section.

Background information

The introductory information should preferably be no more than a paragraph or two. It should establish the credibility of the organisation in the area of biodiversity conservation and should attract enough interest for the funder to read the rest of the document. It should cover most of the following:

- The name of the organisation.
- How long it has been running. Longevity means credibility and that the organisation has withstood ups and downs over time.
- Explain the purpose of the organisation as a whole, not just the specific project. The geographical reach of the organisation, the biome protected or the field of endeavour within conservation on which your organisation is focused.
- Who or what it serves (specific local communities, an area, ecosystem or species).
- How the organisation functions. Is it in one area only? Does it have a national or provincial head office with branches?
- The number of staff and volunteers.
- Their qualifications and experience.
- Briefly list the current projects.
- Explain what the NPO has achieved to date.

The introductory section should be a well written sales pitch and you should look at it often and keep honing it until you are satisfied that it will be speaking to the funder on your behalf. Concise statistics will impress. The closing words should be a statement of anticipated success rather than a desperate appeal.

The need or problem statement

This should also preferably be a concise section, ideally no more than two or three paragraphs. What is the need of the community or ecosystem served by the organisation via this project? Don't be tempted to go into too much emotional detail or lengthy descriptions of an oil-drenched penguin, a destitute community's animals over-grazing an area or the urgency of the research needed. However, it is important to outline the problem being addressed. Statistics work well here. This is one of the sections of a proposal in which we are tempted to write too much. Don't, as you can enclose cuttings, pamphlets and other documents that can emphasise the need.

Description of project

This is the 'core' of the reason for writing to the funder. Do not waffle. This is, however, the longest section of the proposal and could therefore run to two or three pages if necessary. Concisely outline the work and objectives of the specific project for which you are requesting support by considering some of the following questions:

- What is the project called?
- Is any other organisation doing the same thing?
- How does it build on past or current efforts?
- Why is yours the best organisation to handle this project?
- What is the unique selling point (USP) of the way in which you address the problem?

- Has the target community been consulted?
- What will the outcomes or impacts (benefits) be for biodiversity?
- What will the outcomes or impacts (benefits) be for people (often a local community)?
- How will or does the project work?
- Who does or will run it?
- How long will it take? (Ensure that the time required is in line with the budget period).
- What statistical detail can you provide?
- What will the project achieve holistically?

Exercise: Identify your projects' USPs

- Think of what is special, unique or different about how projects are run by your organisation.
- Can you clearly identify the unique selling points per project?
- If not, are there any? Establish whether they have been ignored to date. If so, how can you present them in your proposals to excite potential donor partners?



People love successes and want to be part of successful concepts and organisations. We had an occasion in which a landowner, who initially declined to even talk to us, on seeing the success of what we were doing, sent an e-mail saying, 'I also want to be part of protecting the environment'.

Eden to Addo Corridor Initiative



Monitoring and evaluation

Every funder wants to know how their money will be spent. Reassure the potential donor that the project will be properly measured.

- How will you monitor and evaluate it?
- Who will monitor and evaluate it?
- When will it be monitored?
- How often will the funder be informed?
- By whom, how and when will the evaluation be conducted? Give the potential donor all information on the evaluation process.
- How will you determine that the project has been successful?
- How will you demonstrate that the money has been properly spent?

The publication, *Monitoring and evaluation: tools for biodiversity conservation and development projects* (ISBN 978-1-919976-47-1), an earlier book in the SANBI Biodiversity Series, is an invaluable introduction to monitoring and evaluation, offering the added benefit of being focused on biodiversity conservation.



Sustainability

We've all heard of 'sustainability'. It has rapidly become one of the most critical issues in the NPO world. Sustainability within the NPO sector and biodiversity conservation in particular, refers to both the sustaining or 'keeping going' of the project (generally after the period for which funding is sought) as well as the project and, if possible, the organisation's own financial self-sustainability. It also has bearing on the longevity of an organisation or project. This is often the hardest part of any funding proposal as donors dislike hearing that, after the life of their grant, the organisation will simply seek another donor.



Exercise: Consider the competition for donated money

Pause for a moment and imagine adding up (rounded off to millions!) the amount of money needed by every non-profit organisation including the 110 000 NPOs, faith-based groups, schools and tertiary education institutions in South Africa each year with which biodiversity conservation NPOs are competing for donor funding. Then, consider the total amount of potential donor rands. Clearly, there is unlikely to be enough money to be given away to meet these needs.

If one extrapolates this to include all the non-profit organisations worldwide, the harsh reality that emerges is that there is not nearly sufficient money available for charitable needs, let alone those intended for conservation. Do you agree? So, what does the future of NPOs both locally and globally look like, considering that there is not (and unlikely to ever be) enough money to donate for their needs?

Income generation in order to help to sustain NPOs

Donors want to be part of success. 'Desperation' has no place in either written or verbal communication with potential or even existing donors. No one wants to give your NPO its last one, two or even three months' money before it closes. They would rather invest in organisations that are likely to succeed. The plight of the local community destroying the biodiversity on their (or others' land) may well be a desperate one; the extent of the threat to a hotspot is desperate, as is the importance of preserving endangered species. However, NPOs should not refer to their own financial situations as 'desperate'.

Biodiversity conservation NPO board members and managers are strongly advised to implement income-generating initiatives in order to supplement their budgets. The more an NPO does for itself, the happier donors are to support it. Success breeds success. NPO board and staff members must run their organisations in a professional and businesslike manner. Donors today are seeking to partner with those organisations that are doing, or are at least planning to do something to generate money. Income generation encompasses anything from selling items to tendering for government contracts. Donors cut to the bottom line and will be drawn to the Income section of the budget to look for the percentage of the annual needs that are self-generated. NPOs' business plans (if they have them!) should, ideally, show a planned increase over the coming three to five years, of self-generated income.



Exercise: Identifying information on sustainability factors for funding proposals

For each project for which you have to write a proposal, identify:

- In-built income generating aspects.
- Details on the organisation's financial self-sustainability.
- Information on the sustainability of each project.

9.4 TITLE PAGE/PROPOSAL COVER

This is literally one page. It should be on your letterhead and state the title of the project. This is an excellent opportunity to provide shock statistics, a sentence from your mission statement or a quote from a respected conservationist or a high profile patron.

9.5 INDEX

An index, or table of contents, is optional and advisable should the proposal become lengthy, such as when doing one for foreign donors.

9.6 THE COVERING LETTER

The letter accompanying your pack or proposal documents should be on your organisation's letterhead. Ensure that it contains all the correct details such as your postal address, e-mail, website and telephone numbers. Also make sure of all the information on the potential funder: title, correctly spelt name, accurate address. The covering letter should ideally not be more than a page or two. It should be polite, well written and concisely summarise the rest of the document. This is your first impression. Don't demand. Don't beg. It is the document in which you ask for money and is usually the only one written in the first person ('I', 'we'). It also summarises the entire pack of documents.

9.7 ENCLOSURES/APPENDICES

Items enclosed with the proposal depend on each organisation and specifically on what each donor requires or stipulates. The following could be relevant:

- An organisational details sheet with board or committee members' names and brief CVs.
- Brochure/pamphlet.
- Staff qualifications/experience—briefly.
- Letters of endorsement.
- Letters of requests from target community.
- Quotations for capital items.
- Copy of NPO certificate or PBO status information if not part of your letterhead.
- Photographs.

If you include press clippings, do not send originals. Photocopy them, one to a page, and clearly indicate the publication and the date.

Do not include:

- CD-ROM.
- DVD.
- Flash stick.
- Electronic devices or products.
- Constitution (unless requested).

Eden to Addo Corridor Initiative started with the germ of an idea. Keep working on your organisation and projects; eventually people will 'get it'. One must stay positive in conservation.

Eden to Addo Corridor Initiative



9.8 APPLICATION FORMS

Answer the questions

In the case of donors requiring the completion of application forms, it is vital that forms are filled in properly. At the risk of appearing facetious, there is one simple rule to the correct completion of application forms—answer the questions! Answer the questions exactly as asked. An alarming number of people do not carry out this straightforward task and, instead of providing the information requested, fill in inappropriate waffle. This can often be due to laziness as people cut and paste ready answers from previously written generic proposals or previous application forms.

Respect the donor's right to have forms

Application forms can be tedious. However, some potential donors have taken the trouble to draw them up, as they are clear on the specific information that they want. The main reason that these forms can be off-putting and difficult to complete is that they are generic. Donors often have only one form, irrespective of the diversity of their grant making. How many times have you seen utterly irrelevant questions on such forms? The most difficult forms to complete are often from donor countries where English is not the mother tongue.

Not applicable

It is quite acceptable to write in 'n/a' (for 'not applicable') if a question does genuinely not apply to your project. Another lazy and quick way out used by certain fundraisers is to overuse 'n/a'. This is also wrong.

Use allocated spaces

Avoid not using the spaces provided by writing up information or a budget on plain paper as an enclosure and putting down, 'see annexure A' or 'see enclosed'. If this information was wanted or needed by the donor as an enclosure, it would have been requested as such. If a space has been provided for information, use it!

PDF forms

Certain donors, notably, the National Lottery Distribution Trust Fund, insist that their PDF forms may not be re-produced (i.e. retyped). This results in one having to purchase the programme Acrobat Writer or complete the form by hand (which the Lottery finds acceptable). One can type into forms without Acrobat Writer but you are then not able to save your work and, if not on a laptop with a battery or a computer uninterrupted power supply (UPS) device, all work is lost, should there be a power failure.



Exercise: Writing a proposal per project

Does your organisation have an up-to-date generic proposal for each project?

If not, develop them—ASAP.



Exercise: Practice completing application forms

If you are not experienced at completing application forms and even if potential donors to your organisation have not announced a call for applications, practice by completing previous forms. This will help you to overcome any resistance that you may have to completing such forms, prepare you for when calls are made and you may well have developed some powerful yet succinct wording that can be used or minimally adapted when application calls are announced.



Figure 12.—Funding proposal for taking local community beekeeping in the Baviaanskloof to a commercial level.

Introduction

The Friends of the Baviaanskloof Wilderness Area (FOBWA), a non-profit organisation, was founded in 2001 with the specific objective of protecting and preserving the Baviaanskloof Wilderness Area (BWA) World Heritage Site for future generations. No trustee or member of the trust personally benefits financially or is in any way advantaged, in undertaking its vision of protecting and preserving the BWA World Heritage site and its communities. Being an independent NPO is critical to FOBWA, enabling it to operate without fear or favour when dealing with local stakeholders such as the Eastern Cape Parks and Tourism Agency (ECPTA), landowners or any other organisations.

The Baviaanskloof Wilderness Area is 120 km west of Port Elizabeth in the Eastern Cape Province, and comprises approximately 270 000 ha of unspoiled, rugged mountainous terrain. It represents seven of the eight South African biomes—distinct ecological communities of plants and animals that live together in a particular climate. Due to the area's diverse habitat, the spectacular landscapes are home to more than a 1 000 different plant species. The flora of the area encompasses a wide range of diversity, including two species of genetically distinct ancient cycads. The Reserve provides a habitat to more than 50 mammal species, over 300 bird species, and other animal species such as reptiles and amphibians.

The work of FOBWA is concentrated in five main areas:

- Educating members and the public about the BWA—public awareness via newspaper articles, talks and newsletters.
- Wilderness advocacy—conducting wilderness workshops.
- Experiential education in the wilderness—conducting trails for local schools.
- Financial support for local projects—i.e. fundraising.
- Monitoring of activities on and around the reserves and liaising with relevant authorities where contraventions are found.

Local poverty and traditional practices

As a result of both poverty and tradition, communities in the Baviaanskloof remain largely dependent on the natural environment for building materials (clay, wood and reeds), cooking facilities (wood as a fuel source), medical treatment (indigenous medicinal plants) and nourishment (wild plants and animals and honey from wild bees' hives). These needs result in unsustainable pressure on the natural environment of the Baviaanskloof. It is home to a number of small communities of farm workers and their families, estimated at about 1 000 people, who live in extreme poverty and have minimal educational levels, with only a primary school in the Kloof. In order to supplement their low incomes, these communities harvest medicinal plants (including aloes) illegally from the Wilderness Area for sale in centres outside the area, negatively impacting on the biodiversity of the area.

Beekeeping project

In response to the need for both an income for local residents and attempting to preserve the biodiversity of the area, FOBWA, in partnership with the Eastern Cape Parks and Tourism Agency, committed to support the concept of taking local beekeeping practices to a commercial level. This will ensure the creation of opportunities for sustainable livelihoods for local communities of the Baviaanskloof Wilderness Area, while also reducing pressure on local wild bee populations, as honey extraction from wild hives will be reduced. This project is in its second phase and is a continuation of the start-up phase in 2007/8 when local beekeepers were assisted to purchase the necessary protective clothing and equipment.

The project has the support of the Eastern Cape Parks and Tourism Agency, the provincial Department of Economic Development and Environmental Affairs and the national Departments of

Environmental Affairs and Arts and Culture. It is also supported by the Baviaans Local Municipality, Kouga Municipality and the South African National Biodiversity Institute (SANBI).

Objectives

The primary objective of the project is to take existing local community beekeeping to a commercial level by:

- Building a honey processing plant for local community beekeepers.
- The continued mentoring of current beekeepers to enable them to extract and process honey for commercial purposes.
- Providing training and monitoring the implementation of good manufacturing practices to ensure that the processing facility is compliant with local food safety regulations, guidelines and retail store requirements.
- Facilitating honey sales to retail stores.

The project will also result in effective protection of wild beehives and facilitate an increase in the numbers of healthy bee populations, thereby securing crop pollination by bees (a vital ecosystem service for food production).

Outcomes for the local community include:

- Socio-economic benefits through job-creation and small business development.
- A sense of achievement and pride via the black-owned beekeeping honey processing plant in a predominantly farm owner/farm worker setting.
- Building bridges between surrounding landowners and local community members in the Baviaanskloof, as, in time, some hives can be rented to farmers to provide a pollination service on food producing farms.
- Enhancing cultural practices by stimulating the development of indigenous beers of which the main ingredient is honey. This beer is healthy and could eventually be manufactured to be marketed to tourists, which would, in time, lead to job creation and further small enterprise development.

Outcomes for biodiversity:

- The establishment and maintenance of healthy bee populations—a vital outcome due to the global decrease in the number of bees.
- Maintaining pollination, vital to the ecosystem, as bees perform this service for both natural vegetation and crop production.
- The protection of wild bees, as local communities will no longer need to raid wild hives to access honey.
- The protection of other species—the income generation/job creation benefit from honey sales will allow community members to purchase additional dietary requirements as opposed to being forced to poach bush meat from the conservation estate.

Project aim

The aim of the project is to enable a fully operational and commercially competitive honey processing plant, owned and run by trained and skilled beekeepers from the local community, by the end of 2011. This aim can be achieved through ensuring that the following outputs or results have been accomplished:

- A honey processing plant built.
- Advanced beekeeping mentoring and training provided to scale up current efforts to a commercial level.
- Co-operative, business skills and good manufacturing practices; training successfully conducted.
- Implementation of training to create a commercially competitive honey product.

Project implementation

In order to ensure that the project is successfully implemented, a honey processing plant must be built once plans have been drawn up and approved and funding is secured. A construction company will then be appointed.

Advanced beekeeping mentoring and training skills will be developed and provided to community beekeepers in order to take existing efforts to a commercial level. Co-operative, business skills and good manufacturing practices training will be provided to ensure the overall success of the initiative as the honey must be commercially competitive.

In addition, processing and packaging systems will be developed, tested and adjusted where necessary, market research will be undertaken and retail stores and other market opportunities investigated. Sales, delivery and financial management processes will be implemented.

Funding support to date

Funding for Phase I of R119 790 was received from Critical Ecosystem Partnership Fund (CEPF). In-kind support has also been received from the Eastern Cape Parks and Tourism Agency (People and Parks Programme), in the form of project development assistance.

Monitoring and evaluation

FOBWA will elect a project manager who will work closely with the ECPTA People and Parks team in order to closely manage the project and monitor its daily functioning.

Sustainability

The benefits of the project will be maintained after the expenditure of the requested funding through the sale of the commercially viable honey products. Once optimal levels of honey sales have been reached, the initiative will be financially self-sustainable, while providing an income to impoverished local communities.

Figure 13. — Beekeeping project budget for 2010.

Activity	Estimated cost (in rands)	In US\$ at R6.50 to the dollar
1 Honey processing plant planning and construction	R72 600	\$11 169
2 Beekeeping mentoring by Makana Meadery	R48 000	\$7 385
3 Training and implementation of Good Manufacturing Practices (GMP) by ENTECOM	R55 680	\$8 566
4 Cooperative and business skills training	R30 000	\$4 615
5 Project management by Another Way Trust	R35 567	\$5 472
6 Monitoring and evaluation including baseline establishment	R30 000	\$4 615
7 Overall project management, travel and administration costs	R48 000	\$7 385
8 Documentation of the project experience and exchange visit with similar project	R9 000	\$1 385
9 Contingency	R20 000	\$3 077
TOTAL	R348 847	\$53 669





Figure 14.—Funding proposal for Harmony Bay Sand Dune Conservation Project

Introduction—the partners

Harmony Bay Conservation Association (HBCA) is a community based forum established in 1998 to monitor developments affecting sand dunes, and the biodiversity that they support, on the Harmony Bay beaches of the Western Cape. This volunteer led forum is representative of local community based organisations (CBOs), civic groups, the local municipality and businesses in the area. HBCA's role is to monitor conservation efforts and to ensure that these have support from local councillors and municipal staff.

Western Cape Environmental Concern (WCEC) is a partnership project between the Harmony Bay Municipality, the South African National Biodiversity Institute (SANBI) as the implementing partner, the Table Mountain Fund (TMF) and the Botanical Society of South Africa, under the banner of Cape Action for People and Environment (C.A.P.E). WCEC builds good practice in sustainable management of Western Cape nature conservation sites in a people-centred manner that builds local leadership for conservation action and benefits the surrounding communities, particularly impoverished townships and informal settlements.

Inpatho Yendalo is a community based environmental organisation working with the youth in the impoverished areas adjacent to Harmony Bay, with its focus on the preservation of water and biodiversity conservation locally. The organisation was launched 15 years ago and is well established and has credibility and support within all local communities.

Dunes under threat

Wola Nani, an impoverished community alongside Harmony Bay, is a fast growing settlement with informal structures being erected on an ongoing basis. People living there suffer high levels of unemployment and poor access to health care and education.

Harmony Bay's sand dunes cover an area of 1 200 ha and forms one of the last major dune systems remaining in the Western Cape and host several endangered species of dune vegetation. The area is part of the False Bay Corridor Initiative, which aims to develop the economic and ecological potential of the area. The Harmony Bay dunes have been identified by the City of Cape Town as a hotspot in terms of its biodiversity strategy. The large dunes at Harmony Bay play a functional role in protecting Wola Nani from sand drift. Local traditional healers harvest medicinal plants from the dunes, which are also used for environmental education of school learners. The dunes are threatened by the rapidly expanding demands of the Wola Nani community, with informal settlements spreading onto the dunes.

Dune conservation project

In response to the endangered biodiversity of the Harmony Bay sand dunes, the partner organisations initiated a project aimed at transforming this threat into an opportunity by contributing to sustainable conservation of the dunes through youth development and the training of community monitors to ensure the protection of the dunes. Key to the initiative is the building, strengthening and maintaining of the vital but delicate relationship between people and nature, the core message being the understanding that if humans care for nature, nature will care for mankind.

Project phases

This project is planned over four phases. This proposal focuses on the implementation of the first three.

Phase I: Participatory action, research and consultation

A project team will be established between the partners responsible for conceptualising the initiative, in order to consider technical aspects. Consultations will be undertaken with interested stakeholders such as the Wola Nani community structures and leadership to strengthen these relationships and obtain the all-important local community support for the envisaged project. Such

engagement is vital in order to remain in touch with developments within Wola Nani and to be aware of sensitivities around related issues. Consultations will enable informed interventions and assure the project of a stronger chance of success.

During the first phase, 15 local unemployed youths will be recruited, trained and employed as dune marshals. Their role will be to create awareness within Wola Nani and neighbouring communities about the sensitivity of the dunes. They will also liaise with local structures, building effective relationships with grass roots organisations and local government and act as a support mechanism to the project. It is envisaged that the first phase will only take four weeks.

Phase 2: Community capacity building

The second phase will run almost concurrently to the first, starting in the second month and will identify the most vulnerable settlement and conduct a series of focussed educational sessions about the Harmony Bay dunes, facilitated as part of trainees' capacity building. A focus group will then be established to provide support in the rolling out of the campaign raising awareness and to act as a link between Wola Nani and neighbouring communities.

Ultimately, based on volunteer interest, the focus group will be recruited as volunteer members of Inpatho Yendalo who will assist in ongoing engagement in the area. Such volunteers will, hopefully, continually grow their own understanding of and commitment to preserving the biodiversity of the dunes and share this message locally. Although, not paid, these volunteers will gain in numerous other ways—from enhancement of their own CVs, life skills and stature within their communities.

Phase 3: Raising awareness

With the support of the focus groups, a series of events and activities will be undertaken in order to build levels of consciousness about issues related to nature conservation and local natural resource management. These will include activities such as door-to-door awareness campaigns, supported by parallel initiatives including school tours, creative education, environmental days and public gatherings. Pamphlets will be distributed and posters and banners will be erected. In addition, information packs and T-shirts will be distributed. The awareness campaign will also generate regular media releases. A DVD will be produced which will be useful to initiate discussion in schools and at meetings around the engagement between communities and nature.

Based on the developments within the third phase, phase four will be focused on strategically engaging with the same community through initiating practical projects as a proactive response to the broader socio economic challenges related to the project and as a means of arriving at mutually agreed solutions.

Monitoring and evaluation

Based on the project's life cycle model in each interface (between each phase), there will be an intermediary session by the project team to reflect on activities, indicators and results and to plan the way forward for the project. After three months, the project will be evaluated by HBCA, project team and all relevant stakeholders, with the assistance of an independent facilitator, in order to arrive at recommendations for the project's ongoing success.

Sustainability

The DVD will act as a valuable resource. The committed support of focus group volunteers as well as the constant expansion of volunteer numbers, will ensure broad support for the initiative. The ongoing commitment of the partner organisations will further underpin the longer term viability of the initiative.



**Figure 15. — Harmony Bay Sand Dune Conservation Project Budget
01/04/2011–30/03/2012.**

Expenses

Salaries	R6 000
Temporary staff	R6 000
Travel and subsistence	R2 800
Operating expenses	R2 200
Education/Training	R16 800
Printing/Publication	R6 600
Project promotion	R600
Project evaluation	R2 000
Communication materials	R20 000
Total	R63 000

Income secured

Communication materials	R20 000
Balance required	R43 000

Section 10: Capital campaigns

By the end of this section, you will have:

- Clarity on the difference between ‘ordinary or project’ fundraising and raising funds for once-off capital purchases, which might well include threatened land, vehicles or equipment.
- An understanding of how to prepare for a capital campaign.
- A good idea of who should be involved in such campaigns.
- Clarity on the management structure of a capital campaign.

10.1 BACKGROUND

Fundraising for a building, to erect a statue or monument (often referred to as being made possible by ‘public subscription’) or to purchase a library collection for museum exhibition, has been around for centuries. However, it was only in the 1970s that these efforts were recognised as a readily defined and focused strategy and the term ‘capital campaign’ was born. Following a number of trial and error successes and failures, a clear process of raising money to (generally) buy or build something, has evolved into the tried, tested and globally recognised capital campaign processes as carried out today. Capital campaigns have their place in conservation fundraising too. Funds are often sought specifically to purchase land in order to conserve valuable biodiversity.

Understanding, learning and the adhering to proven capital campaign methods, systems and techniques will substantially increase the success of any planned capital campaign. Obviously, creative additions to a capital campaign can only enhance its chances of success and innovative value-add ideas can improve such a campaign.

What exactly is a capital campaign?

A capital campaign is a coordinated institutional effort, with a specified goal and timetable, to increase an organisation’s permanent assets—a building, a significant expansion of a programme, endowment, or a combination of these—that will lift the organisation to a higher level of performance’.

HAYDEN, T. 2006. *Capital Campaigns*. Directory of Social Change, London.



We based our capital campaign on the fact that the wilderness is rare and becoming more rare and therefore valuable. We devised a ‘Banking Biodiversity’ initiative in which people purchase a share of wilderness area, have their own legal deeds, even receive a tax rebate and their investment appreciates. They may sell their share (for a profit) in time, as it gains in value.

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Capital campaigns are not 'ordinary fundraising'

- They are short or medium term and have a beginning, middle and end.
- Success or failure depends on senior management involvement/commitment.
- They may include volunteers on a short to medium term basis.
- If the target is not met, they can fail.
- Capital campaigns grow or expand an organisation's capital assets.
- Capital campaigns elevate NPOs to a higher level.
- They provide excellent opportunities for marketing and PR.
- They often bring new supporters on board who could/should be nurtured to become ongoing donors.

10.2 RISK

Capital campaigns, if not successful, carry risk to an organisation, primarily around its image. Such initiatives must therefore be clearly thought through prior to being undertaken. Risks include:

- Damage to the image of the organisation's name through a burst of publicity but the campaign failing due to the target not being raised. Monies raised must then be returned to donors.
- Capital campaign fundraising can impact on ongoing projects and other fundraising and must be carefully planned.
- Disharmony or rifts amongst staff, chairman, patron or volunteers if they are perceived as 'not doing their bit'.
- A waste of money. Over 50% of successful major capital campaigns in South Africa (and generally worldwide) are outsourced to a consultant to manage. If board members, volunteers or staff members don't deliver, the consultant (capital campaign manager) has no campaign to manage. NB: A capital campaign manager is not the fundraiser. She or he literally manages the whole process. This can often be a source of misunderstanding.



Success can also equal problems—funds raised but no budget to:

- Maintain.
- Insure.
- Train staff.
- Hire new staff.

10.3 CAPITAL CAMPAIGN PLANNING

Poor planning will cause a capital campaign to fail and a lack of planning can result in or be due to some of the following:

- Insufficient high profile people identified and signed up.
- No or a poor potential donor list.
- No donor research to identify potential support for such a campaign.
- Inaccurate budgets/cost estimates:
 - Inflationary increases due to time passing.
 - Thumb-suck budgeting.

- Quotes not projected forward for inflation.
- Forgetting to include a vital component in building or other plan (e.g. custom fitting of vehicles; software for computers).

Don't forget to consider and plan for the impact of the new building or conservation area on the added workload of existing staff members as well as resultant costs (such as maintenance or insurance).



Impacts of a capital campaign on other fundraising

Negative

- Donors might elect to support the capital campaign instead of projects.
- Dissatisfaction over naming rights/branding.

Positive

- Newsworthiness will raise the profile of the organisation.
- 'Friend-raising'—new partners, new supporters, additional volunteers.
- Temporary senior volunteers may remain involved.
- Many more people, trusts, companies and even government become stakeholders and will be interested in the ongoing progress of 'their' project or organisation.
- Renewed energy or involvement of chairman and board members or their exit.

The way forward

If consensus is reached within the organisation that a capital campaign is wanted, needed, will be supported and has a strong chance of success, a capital campaign plan must be developed. Many organisations opt to outsource this component to an independent consultant who is a step removed from the organisation, not sucked into its internal politics and has no history, friends or enemies within the NPO. His or her independence and impartiality is as valuable at this juncture as the experience and practical skills and advice that he or she will impart.

Should the organisation have a comprehensive and up-to-date business plan, components of such a plan can be inserted into the capital campaign plan, particularly around the organisation's medium and long term vision and goals. The endangered land, building, equipment or vehicle/s may well be an integral part of such goals and go a long way towards the realisation of the vision of the NPO.

Plan the campaign

- What is the intention of the campaign?
- Prioritise.
- Duration.
- Be clear on the amount to be raised. Can the project be carried out in phases?
- Campaign budget—money will need to be spent on the campaign.
- Develop the case for the campaign.





Exercise: Consider capital campaigns for your organisation

- Identify the items (from equipment to land) that your organisation wants and/or needs.
- Prioritise them.
- What will each one cost?
- Are you able to envisage a capital campaign for each need?

10.4 FEASIBILITY STUDY

Survey

A common practice during the early stages of a campaign of this nature is to conduct a focused survey via one-on-one interviews, with people from donor organisations (usually the corporate sector, foundations and high net worth individuals), as well as past donors no longer providing support (for whatever reason) and potential donors, in order to gauge their responses to potentially being approached for support. At such interviews, candour is encouraged and people are inclined to be frank, providing an invaluable opportunity for insight into the perceptions (real or imagined) of the donor pool. Interviewees generally enjoy such an unusual opportunity to express their opinions. Although their views are often not what one enjoys hearing, much can be learned and addressed prior to beginning the actual fundraising process. Potential donors interviewed should have the biodiversity impacts of the intended capital campaign (such as the purchase of land containing endangered species) clearly explained in order that the impact of the purchase can be measured in time.



Exercise: Researching interviewees

Are you able to identify potential donors to interview about their views on your required capital items?

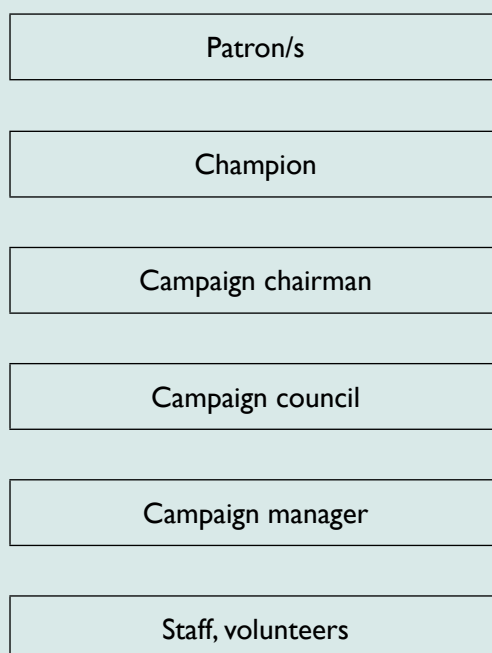
10.5 CAPITAL CAMPAIGN STRUCTURE

It is suggested that the internationally proven structure of a capital campaign be followed, with a champion, campaign chairman and campaign council to which everyone involved in the campaign, would report. In addition, international and local people of stature, particularly those who are known to care about conservation, could lend their names and support in the capacity of patrons.



Exercise: Identify people to fill the roles of your capital campaign council

Can you think of people who could serve in the various capacities in your envisaged capital campaign structure?

Figure 16.— Capital Campaign Management Structure.

10.6 IMPLEMENTATION

A capital campaign should, ideally, be launched at a function at which as many of the esteemed role players and potential donors as possible are present. It might be hosted by or be sponsored by local businesses. This will enable companies to publicise their commitment to conserving local biodiversity. Should the campaign be aimed at purchasing endangered land, the function, if practical, could be held on site. If not, a presentation should be made, including pictures and/or video footage of species in danger. Potential patrons, the champion and members of the campaign council should be approached to serve in these roles. It is always a good idea to have a representative present from a statutory body involved in biodiversity conservation. The inaugural meeting of the campaign council should be held as soon as possible.

The initial meeting of the campaign council should:

- Acquaint members with the vision and mission of the NPO and the goals and objectives of the campaign.
- Agree on suggestions in the draft capital campaign plan (which should have been drawn up), delete those not deemed appropriate and/or make adaptations and other suggestions.
- Consider future phases of the plan to cover longer term financial sustainability.
- Agree on a budget for the costs of the capital campaign.
- Consider/agree on the roles and responsibilities of the campaign manager.
- Consider practical aspects of the campaign.
- Identify guests for the launch function.
- Agree on format, venue, programme, sponsorship for the launch function.
- Compile a list of potential donors, decide who will approach them and ensure that they are invited to the launch function.
- Clarify donor recognition (e.g. naming rights) policy.





Responsibilities of campaign council members

- Identify and allocate potential donors to be approached.
- Door opening for campaign manager or fundraiser with potential donors from amongst friends or business contacts.
- Participate in or attend fundraising functions or initiatives.
- Constantly be looking out for opportunities to benefit the campaign.

Campaign manager/fundraiser

A campaign manager is required to oversee all aspects of the capital campaign. This may be an existing fundraiser who can be dedicated to the campaign, an outsourced person or someone hired for the duration for the campaign. If outsourced, it is vital to ensure that he or she has an understanding of biodiversity conservation and is personally concerned about the threats faced in this area. His or her tasks would include:

- Preparing written materials.
- Researching potential donors.
- Setting up and maintaining the capital campaign work station or office.
- Arranging meetings of the capital campaign council.
- Liaising with the champion and members of the council.
- Preparing periodic and appropriate media releases.
- Monitoring volunteers' tasks.
- Following up on leads supplied (doors opened) by patrons, the champion and capital campaign council members.
- Setting up and maintaining records.
- Handling all administration tasks required by such an initiative.

Skills required

As a capital campaign manager/fundraiser is generally required to work largely on their own, he or she should have:

- Experience in capital and other fundraising.
- Excellent English writing skills.
- Good organisational skills.
- An ability to work in a methodical and systematic manner.
- Excellent English verbal communication skills.
- An ability to interact at all levels.
- A strong work ethic.
- The freedom from family or other commitments to do the work—it is not a nine to five job.
- Knowledge of and an interest in the work carried out by the organisation in particular and biodiversity conservation in general.
- The ability to generate ideas and to follow them through.
- Good interpersonal skills—he or she will have to guide/manage volunteers at various levels.
- Tenacity and staying power—it's about kissing a lot of frogs!

Exercise: Identify who can manage your capital campaign

- Do you have a staff member who can take this on?
- Consider whether you have an in-house person or team who could undertake a capital campaign or would you need to hire someone?
- If an outsider is needed, do you have anyone in mind? Generally it is hard to find the ideal combination of a passionate environmentalist and someone with the skills to manage such a specialised campaign, therefore, identifying the right people to bear in mind for future campaigns, can be useful.



To date we have been fortunate enough to have received funding for our capital needs from the National Lottery.

CWCBR



Section 11: Donor relationships

By the end of this section, you will have:

- An understanding of how important it is to grow and maintain good relationships with your donors.
- Become comfortable with reporting to donors.

11.1 REPORTING TO DONORS

Every donor must receive a report. It is scary to see how many NPOs neglect this vital aspect of nurturing their donors. Some donors stipulate, often in a contract, their reporting requirements (format, frequency, deadlines) but most don't as they presume and believe that NPOs will submit reports.



It is far more difficult to bring a new donor on board than to keep an existing one.

Don't be daunted

Many people are concerned that they don't know how to write a report. Don't be! Your donors are your friends and partners. Your organisation and their company or trust (or an individual) enjoy a symbiotic relationship. They have the money and want the conservation carried out. Your organisation can do so but doesn't have the money. See your donors as your close partners, your friends. Write them a letter telling them of both your successes and failures. Don't lie. Don't hide anything. If you have had problems tell them but also tell them what you have done or will be doing to rectify those problems.

There is not one specific format for a report. The choice is yours—just do it!

Reports can range from a one or two page letter to a bound document or even a folder. They can be brought alive by photographs, newspaper cuttings, video clips on CD-ROM, DVDs, letters from beneficiaries and even, if appropriate, samples of products.

Where to start?

Remember, a funding proposal and its budget is a legally binding document. Therefore, start by re-reading your proposal materials.

- Have you done what you said you would do?
- If not, why not?
- Did you run over budget?
- If so, why?
- Were you able to provide the outlined service by spending less?
- If so, what did you do with the extra money? Did you get permission to do so?
- What did you learn from the service delivery?
- What will change as a result?
- How was the service delivery evaluated?
- If not yet evaluated, when will this be done and how?

- What if you have had a major disaster—how will you handle telling the donor? This should also have been communicated at the time.
- Have you met the goals and objectives as stated in the proposal? These may have been exceeded—more sustainable jobs created, more square hectare of veld protected, more biodiversity conserved.

Layout

- Lots of plain white space in the background always makes for easy reading.
- Use a larger than normal font size (e.g. size 14).
- If using photographs, include captions.
- There is no need to create complicated academic type documents unless the funding was for research and the report is aimed at academia.
- Keep it reader-friendly—don't waffle.

Keep records

Keep a copy! Your report could get lost in the mail or in a very busy CSI or trust office. Have copies in case you are requested to resend them. Sending a copy immediately proves that you had done so and had not hurriedly put one together when challenged on this.

Donors (particularly companies, as well as the Lottery) often use NPOs' photographs on their websites, in their own annual reports or in the media. They may request that you scan in originals of photographs or, better still, if a digital camera is used, that you e-mail pictures to them. Keep photographs carefully sorted for easy future access.



We often focus on growing a relationship before even asking for money from a new potential donor. Even if our initial approaches do not result in money, we maintain contact and concentrate on forging relationships—sometimes friend-raising before fundraising.

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Growing and maintaining donor relationships is about:

- Rigorous reporting.
- Accountability.
- Reporting on time.
- Providing donors with plenty of photographs.

Also, don't give up on inviting donor agency representatives on site visits. We arranged for people from the World Bank and United Nations to visit our community beekeepers.

EC Parks Board/FOBWA



We send an e-mailed 'Bulletin from the CEO's desk' every two weeks. It goes to donors and members and it is well received. It is not spam. They were all asked whether they wanted to receive it. Our Bulletin is our primary method of keeping in touch with our donors on a regular basis.

Eden to Addo Corridor Initiative





We feel that the most important aspect of nurturing our relationships with our donors is to share our success stories with them. We do this on an ongoing basis and not only when contractually required to submit reports. We recognise that donors often have donors whom they, in turn, need to keep happy. We keep in touch by sending them brief e-mails with messages such as:

‘We’ve secured another 5 000 hectare of land with your support.’ Or ‘We’ve just created 10 sustainable jobs, thanks to your donation.’

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Section 12: Using electronic media to aid fundraising and marketing

By the end of this section, you will have:

- Gained an understanding of the tried and tested fundraising and marketing methods that can be adapted to electronic media.
- Considered whether you should have a newsletter and, if so, which format will work best for your NPO.
- A better understanding of how your website can act as both a funding and marketing tool for your organisation.
- Considered social networking to aid your fundraising and marketing.

12.1 INTRODUCTION

Although fundraisers and those responsible for marketing their NPOs have expanded their scope of work to include the Internet, it is vital to remain true to the values that governed these practices in the past and to incorporate them into the natural progression to the use of the ever-evolving new media:

- Ethics.
- Transparency.
- Accountability.
- Honesty.
- Donors' privacy.
- Donors' anonymity if requested.

12.2 NEWSLETTERS

More and more organisations are moving towards electronic newsletters. Not only is this environmentally sound, it is also substantially cheaper and delivers the desired information quickly. However, far too few NPOs get their newsletters right. Too many contain waffle and information irrelevant to anyone not closely involved in the organisation such as staff, volunteers and possibly beneficiaries. Newsletters that are not strategically focused to act as both marketing and fundraising vehicles can be lost opportunities if the intention had been to motivate people to donate.

Newsletters should primarily:

- Highlight the conservation crises and issues that the organisation addresses, via its projects.
- Raise the profile of the organisation—marketing.
- Tell success stories. These may include individuals or communities (whose lives were transformed), the turning around of geographical areas previously endangered or preserving a species. The objective of relating specific successes is both to grow the credibility of the organisation as well as to motivate people to feel that their money can achieve more such successes—preserve more biodiversity, create more environmentally sound, sustainable livelihoods or conserve more water.



We use our newsletter to keep reminding everyone in the biosphere of their responsibilities as residents. Whilst we do send out a professional looking newsletter by e-mail, we also produce a hardcopy one aimed at local communities living in our area. As the majority of impoverished people in our biosphere have no access to a computer, we ensure that they receive a dedicated single sheet newsletter into their hands. We have excellent response from this focused, targeted and accessible publication. In fact, we receive more feedback from the local version than we do from the electronic one.

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We were hesitant to spend time on a newsletter as we all receive so many that we either delete or file to read but don't find the time to do so. We are considering just a single page newsletter or may use Facebook to communicate with our supporters. However, we are concerned about how much information goes onto Facebook and how quickly it is replaced by newer postings and are not sure whether people who don't use it regularly would see our information.

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Exercise: Re-look your newsletter

If your organisation has a newsletter, spend some time analysing whether it's working for you by considering the following:

- Why do you have a newsletter?
- Who is it aimed at?
- Do they read it?
- How could you establish this (competitions, survey, request for feedback or giveaways)?
- How many subscribers do you have?
- Do you have an easy 'subscribe' facility on your website as well as embedded into the signature of everyone's (staff and volunteers) electronic signature?

Once you have feedback about your newsletter, don't neglect to plan how best to improve it (or decide whether to retain it).

12.3 THE WORLD WIDE WEB AND THE INTERNET

Despite the blink-and-you-miss-it pace of technological developments, nothing should be neglected regarding ethical issues and practices. These should make a seamless transition to Internet and social networking fundraising and marketing. In the same way as commercial ventures selling products or services online have had to address safe e-commerce, so too have NPOs seeking donations via their websites had to address donors' very real concerns about security and privacy.

Do you know the difference between the Internet and the World Wide Web?

The term 'World Wide Web' (WWW), also commonly referred to as 'the web', is still sometimes confused with the 'Internet'. The World Wide Web consists of many millions of documents and images stored on computers worldwide. To be more accurate, web browsers (such as Internet Explorer or Firefox) used to view websites enable us to view certain areas of the Internet via a easy graphical user interface (GUI). The commonly used term 'surfing the net' simply means visiting one web page after another. Recent advances in web-based technology mean that it is now possible for website viewers to find multimedia files such as sound-clips, videos, picture-animations and even live television embedded in websites. On the other hand, the Internet refers to the global system of interconnected computer networks that carry the interlinked websites of the World Wide Web as well as the infrastructure that supports e-mail. E-mails are sent via the Internet. E-mail software programmes do not operate via the World Wide Web.

12.4 DOES YOUR ORGANISATION HAVE A WEBSITE?

Just a few years ago, one would have asked whether an NPO had a website. Today we say, 'What is your website address?' It no longer occurs to people that an organisation would not have a site, unless it is very small or new. Even in such cases there is the presumption that the website is on the 'To do' list and, generally, that the address has been secured and, while not yet developed, it opens to wording such as 'website under construction'.

Be clear as to the purpose of your organisation's website

All non-profit organisations should have a web presence. This might be its own website, a weblog (blog) or at least a social networking space on an interface such as Facebook. Before deciding where or how your organisation elects to use the Internet, the purpose of doing so must be clearly defined. Is it to:

- Provide credible and useful information on biodiversity conservation in general or specifically on your geographical area or focus of concern?
- Communicate with existing donors?
- Attract new donors?
- Serve beneficiary communities?
- Link corporate donors' sites via banner adverts or hyperlinks?
- Recruit volunteers?
- Lobby for better legislation to address climate change, pollution or other factors negatively affecting sensitive areas?
- Maintain public relations and support broader marketing initiatives?
- Instantly communicate in times of crisis?

Depending on the reasons identified for an online presence, platforms will need to be selected to support the electronic communication required to reach targeted audiences. Successful biodiversity conservation organisations today cannot ignore technological advancements and should, at minimum, have a basic text website with photographs, the organisation's logo and contact details clearly displayed.

12.5 CAREFULLY PLAN YOUR WEBSITE

Before hurriedly contracting someone to develop a website for your organisation, take time to plan it well in-house. The same applies when seeking assistance (whether paid or voluntary) in the revamping of an existing website. Most web developers work for the corporate sector and don't have a 'feel' for the non-profit world or an understanding of biodiversity conservation. Their skills are in layout, design, navigability around the site and search engine optimisation. Developers should be up to date on the latest technological developments. You will need to provide both the written information and pictures for your site and you may need to oversee its design and development. By putting some thought and planning in ahead of a meeting with the web developer, you will be able to give them a clear idea of what you want the site to do for your organisation. You do not need technical knowledge or know ICT jargon to guide a web developer.

Dot what?

As part of the rapid expansion of the virtual world, new suffix options for website addresses have been added. Dot com (.com) addresses, denoting a company as opposed to government (.gov), academic institution (.ac) or educational body such as a school (.edu), have been so oversubscribed that another option for businesses was added a few years ago (.biz).

A number of South African NPOs have not opted for the obvious website address ending in .org.za, which indicates that it is a non-profit organisation with .za showing that it is based in South Africa. Most people familiar with the rationale behind domain name suffixes find it somewhat jarring when they come across an NPO with a domain name ending in .com or .co.za (a for-profit business in South Africa). Ideally, non-profit

organisations' addresses should end in .org.za. American website addresses do not indicate a country as the USA developed the Internet and no one envisaged its potential global application during its early days when it was a safe, confidential and fast means of communication for the American military. Many NPOs worldwide (not just those in the USA) use .org only and do not put in their countries' ending, in order to emphasise the global nature of the web as well as the NPOs' intent to expand their support base.

Choosing a website address

Website addresses—or domain names—have been snapped up since the WWW rose to prominence in the early 1990s. As a result, some businesses and newer organisations are no longer able to secure their ideal addresses. The rapid technological development and power of search engines such as Google have made it easier for people to find organisations on the net. However, it is still desirable to have an easy to remember and obvious domain name (the shorter the better) in order to prevent typing errors when prospective visitors key in your organisation's web address.



We originally registered our domain name as www.capebiosphere.co.za but, after realising that this was not ideal, we also secured the domain name www.capebiosphere.org and even registered www.capebiosphere.com in order that no one else can do so. It was a simple matter to have any option routed to open on our website.

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You can use the free domain checker at <http://www.africaregistry.com> to see whether the domain name you are considering is still available.

Website hosting

The hosting of non-profit organisations' websites, providing that they end in .org.za, is free or substantially cheaper than the hosting of a business site. However, Internet service providers (ISPs) in South Africa require documentary proof of a non-profit organisation's legal status, such as an NPO Certificate, when requesting free or substantially discounted hosting.

A number of 'fundraising' websites have appeared over the years (and thankfully, those set up primarily to make money for middlemen, have closed). Credible initiatives such as Greater Good <http://www.greatergoodsa.co.za> could be considered for free hosting. In addition, such websites periodically run campaigns such as Greater Good's 'Do It Day', and they are worth monitoring via their free online newsletters.



We've had some wonderful donations via GivenGain. See www.givengain.com. Students often raise money for us via this site.

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GlobalGiving.Com

After a successful career at the World Bank, Dennis Whittle left to follow his vision of enabling people worldwide to donate to non-profits anywhere in the world, and GlobalGiving.Com was born. Since 2002, GlobalGiving.Com has facilitated donations in excess of \$32 million. This is an ethical and highly recommended website on which to register your projects/needs and for supporters worldwide to monitor its development.

www.globalgiving.com

12.6 DOES YOUR WEBSITE SERVE AS A FUNDRAISING TOOL?

The World Wide Web is about information. Today there is very little, if anything, that cannot be found online. An NPO's website should therefore also serve as a portal for varied information on the organisation and the aspect of conservation that it addresses. Many NPOs and even CBOs have excellent websites, but not all fill the role of an easy mechanism for donating to the organisation. Many even fail to clearly state the importance of their donor partners in the hope of motivating more people to give. It is essentially people who view websites. The primary donor target market is therefore the individual. Those representing trusts, companies or government don't often search websites looking for organisations to support. Their visits to NPO websites are usually as a result of offline media drives or in response to receiving an application via the normal channels, such as an application form or written proposal for funding.

Ideally, a large 'donate' or 'click here to give' button should be prominent on the home or landing page—the first page that appears when a website is opened. Potential donors should not have to search through page after page to find out how to make a donation.

It is an excellent idea to spend time looking at other organisations' websites for both creative ideas and also to evaluate how easily, or not, it would be to make a donation. This exercise will both inspire you with ideas to emulate and, importantly, demonstrate what not to do when enhancing your website (or planning a new one) from the perspective of the potential or existing donor.

PayPal

PayPal, the global transmission mechanism with over 170 million account holders in 68 countries was launched in South Africa early in 2010 by FNB. This user-friendly and inexpensive mechanism for sending and receiving money worldwide, is now available to South Africans. NPOs welcomed this long awaited development to save the exorbitant bank charges on international donations and the hassle of the paper work as well as to receive donations, safely and inexpensively, via their websites. www.fnb.co.za



As the Internet evolves and web development technologies constantly improve, new and innovative options are continually becoming available. However, some fundamental points to ensure that an NPO's website acts as a resource mobilisation tool remain constant:

- Clear and obvious donation button on the home page.
- Search engine optimisation—to ensure that your website opens as high up as possible when someone uses Google or another search engine.
- Online giving facilities (credit card facilities, PayPal or banking details).
- Bequest information (downloadable codicil).
- Wish/needs list—updated!
- Volunteer recruitment opportunities.
- Donor recognition policy (including honouring requests for anonymity).
- Membership options (possibly a 'members only' section).
- Income generation—product sales, eco-tourism booking facilities' or publication sales.
- Newsletter or other communication subscriptions.



12.7 KEEP IT FRESH

Websites are live facilities and should be treated as such. Information on a website must therefore be updated constantly. The quality of the content and material on your website is one of the most important influencing factors in your receiving regular and numerous visitors to your site. Content should be related to biodiversity conservation and your specific field of work.

Plan the ongoing updating of websites and blogs as well as the continual dissemination of information via social networking as an integral aspect of the design and maintenance of your online fundraising and marketing strategy. Updating or maintaining your website need not be expensive and does not necessarily have to be done by a professional web developer. Anyone with basic computer skills can make adjustments to the site and add content to the chosen social networking platforms via the now easy-to-use, web-based interfaces available. Not all web developers who set up NPOs' websites advise them of this cost-saving option. Be sure to enquire about having a content management system (CMS) website created in order to facilitate in-house web management, rather than having a high-end, complex website developed which, as well as being unnecessarily expensive, will require the expertise of a highly knowledgeable web programmer to make even minor changes to the site.

Combine old and new methods

Integrate old, tried and proven marketing practices into electronic communication. Do not over-clutter web pages. Less is often more in good design. Leave plenty of space between text paragraphs, headings and borders. Ensure that your website and e-mail addresses appear on all letterheads, business cards, brochures and other printed items, as well as in every media release. It is vital to constantly drive people to your site as well as to make it easy for them to e-mail you.



We have found our website to be invaluable. As a small organisation, it enables us to reach an international market. Through our website we have built up strategic partnerships. University students, particularly those in botany, find us online and we've had the benefit of excellent student interns from a number of countries as a result. These volunteers benefit our NPO in a number of ways and the local children in our community awareness project thoroughly enjoy the opportunity of learning from our international student volunteers. Many lasting global friendships have been forged as a result. This all originated from our web presence.

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Exercise: Assess your organisation's website

Taking into account all the points above, look at your organisation's website critically.

- If you were a first time visitor, would it have been easy to find the information required?
- Do you have a prominent 'giving button'? How easy (or not) is it to make a donation either via your website or with information provided on your site?
- How effective is your site's search facility? Type in a few key words and see whether the appropriate pages open.
- Are you happy with the 'look' and 'feel' of your site?



Visit other biodiversity conservation organisation's websites. I particularly liked some in American conservation parks for ideas for booking on hikes. Maps work extremely well on websites.

Eden to Addo Corridor Initiative

12.8 BLOGS TO AID FUNDRAISING

The term 'blog' is a shortened version of the original term 'web log', developed about ten years ago as a way to keep an online diary. Blogs have evolved around a culture of online public journaling, with editorial content and quality often rivalling that of articles in major magazines and newspapers.

Three of the most popular blogging sites are Wordpress, Blogger and LiveJournal. Like many social networking platforms, they are free to use and do not require web-coding knowledge to set up. All you need to do is enter your organisation's details where it says 'Create Account' and you will be given a blog web address such as <http://yourblogname.wordpress.com>. You can then enter text, upload photos and publish your blog online. That is the easy bit. The difficult bit is finding the time to come up with content that web users will be interested to read and, ideally, motivated enough by the good work your organisation does, to want to fund it.

Blogging is pointless if you do not have something interesting, informative and inspiring to say and someone committed to maintaining it.



There are ways of making your blog fun and interactive. For instance, you could ask questions of your readers and invite them to comment and give their opinions at the end of your blog article. You can also upload videos and pictures to your blog, tag specific words that you wish to have appear in online searches and link your blog to your website and Facebook page.

The beauty of blogging is that, unlike traditional media, you are given a public platform to present your organisation and its fundraising and marketing messages to your targeted audience and the general online public. You get to use your own messages, in exactly your own words—unedited, unfiltered and in their entirety—allowing you to be as creative as you like, limited only by your own writing skills and your audience's level of interest in your organisation and biodiversity conservation.

Blogs can be used to document fundraising drives or encourage volunteering or activism. Newsworthy blog topics might include such happenings as oil-spills, forest fires, rescue operations of beached dolphins or whales, removal of alien vegetation or other environmental clean-up projects. Encourage volunteers to link their blogs to the organisation's main blog during times of environmental crises or fundraising drives, thereby creating a network of blogs and growing your audience and supporters.

Be warned though that many spammers (unsolicited junk e-mail in the hope of making a profit) use technologies which post authentic-looking but ultimately vacuous comments on blogs with the sole intention of linking to their for-profit sites. Fortunately blogging sites provide users with easy tools to moderate, edit or remove comments, and spam can often be quickly deleted with just a single click.

The Trails and Tourism Project was earmarked as a flagship project for Cape West Coast Biosphere Reserve, encompassing socio-economic development within the framework of environmental sustainability. Funding was obtained to undertake a feasibility study of which tourism products would match our sustainability principles, whilst ensuring socio-economic development and conservation within the region. An expert team were contracted and five products were eventually identified that dovetailed with the broader development objectives for the region (including municipal, provincial and national strategic planning objectives) that would directly benefit eight previously disadvantaged communities, and indirectly benefit the entire region. A business plan was developed from this feasibility study and funding sourced from the National Lottery for implementation. It is underpinned by a strong partnership departure point.

A blog for this project was developed by the consultants in 2008 to try to encourage stakeholder engagement during the feasibility study and is somewhat outdated. Sadly, it turned out to not be the most useful tool for the West Coast as most of our communities either don't have access to Internet, or are not computer literate.

<http://cwcbtrails.blogspot.com>

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Exercise: Set up a blog

Spend time reading biodiversity conservation blogs (they can be local or international) to gain an understanding of the language and layout. Design and set up your own blog but be clear as to who will update it and how often.



12.9 E-MAIL

An estimated 70 to 85% of donated money worldwide hails from individuals. Online marketing and fundraising is essentially about connecting with individual people. E-mail communication is therefore an excellent potential vehicle for reaching individual donors. However, everyone hates spam. Building up an e-mail address book of donors and potential donors can be done but 'netiquette' must be observed. The use of e-mail communication must be handled carefully and tastefully. Privacy laws are evolving to cover unsolicited e-mails (including newsletters) and 'unsubscribe' requests must always be honoured.

12.10 SOCIAL NETWORKING SITES

All good marketing is about ensuring that your brand has a presence wherever your potential market is (for NPOs, this refers to potential donor-markets). Market research shows that many people with computers spend significant amounts of time visiting social networking sites. For this reason, your organisation should have a presence on those networks that your potential donors frequent—people concerned about conserving our endangered biodiversity. Wikipedia lists over 150 popular social networking sites around the world, along with the number of active users on each (see: http://en.wikipedia.org/wiki/Social_networking_websites).

Facebook

By far the most popular of all social networking sites is Facebook. With over three hundred million more users than its closest competitor, Myspace, Facebook is the place to concentrate your organisation's social network marketing and fundraising strategy until such time as another site replaces Facebook in popularity.

Facebook has around five hundred million active users, compared to Twitter and LinkedIn's 75 million users. Although Myspace boasts 130 million users, showcasing modern bands' music dominate that particular online social scene. International experts in online fundraising and marketing point to Facebook as the social networking site of choice for almost all NPOs.

Facebook enables your organisation to have its own profile, much like a mini website. Users can upload photos and other pictures to their Facebook profile, as well as post promotional videos, sound clips, articles, blogs and other multimedia messages.

Facebook allows staff, stakeholders, donors and interested parties (potential donors) to link their own Facebook profiles with your organisation's profile, thereby 'becoming friends on Facebook'. Whenever something is added or changed on your Facebook profile, an alert appears on your 'Facebook friends' news feed, informing them of your online activity. For instance, an alert might say, 'Joe Smith and Earth Organisation X are now friends' or 'Earth Organisation X invited you to the event, Beach Clean-up'. Anyone visiting your (potentially thousands of) friends' profiles will see your organisation's name when they interact with your profile. In this way, as networks view others' networks, your organisation's name really gets out there!

Facebook is great for documenting and publicising specific fundraising drives and can be used for online-only fundraising appeals by using a mixture of wall posts and the message facility (an e-newsletter type facility whereby you can communicate directly with all Facebook friends). The private message facility on Facebook is a good way to stay in touch with followers and let them know of newsworthy occurrences. Don't, however, over-use this or abuse the public wall-posting facility or you might find yourself losing friends fast!



Remember always to include a link to your website, blogs and any YouTube videos that you have online, as well as specifying clearly how users can donate to your organisation.



We use Facebook but ensure that we only upload quality content and photographs.

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Exercise: First steps with Facebook

If you don't have your own (personal) Facebook page, set one up and get into the habit of updating it and looking at your 'friends' pages. Facebook is not for everyone. Many consider it a waste of time but, as it is firmly entrenched, particularly with younger people, it should not be ignored.

Sign up as a 'friend' of people who care about the environment or find biodiversity conservation organisations on Facebook (go to www.capebiosphere.org and click on the Facebook icon on their homepage) and monitor the posts. This will help you to decide how actively (or not) you will want to embrace Facebook to aid your communication, marketing and fundraising.

Twitter

Twitter is social networking technology that enables its users to send and read brief messages known as 'tweets'. Tweets are typed-in messages of up to 140 characters in length, displayed on the profile pages of the tweeter (the person who wrote the message) and all his/her 'followers'. Posting a message on Twitter is known as 'tweeting'. Each tweet you enter will immediately appear on your own user profile page as well as on the profile pages of all of your 'followers'. Followers are people who opt to receive your tweets.

The key to successfully using Twitter in fundraising for and marketing your organisation lies in building a strong community of Twitter followers. It is pointless to make your debut on Twitter during a fundraising drive in which you appeal for money. Time should first be spent building a solid community of followers who are passionate about conservation, area in which you concentrate your efforts and the work that you do.

Twitter is all about sending brief, instant messages and having your community tweet back their own messages in response, or even better (and most desirable of all), 'retweeting' your messages. The power of Twitter lies in the desirable 'retweet' phenomenon. If your followers really like something you tweet, they can 'retweet' it so that their entire network of followers will see your original message. This has immense potential for sharing information about hotspots or endangered species.

Twitter's usage is known to increase dramatically during prominent events. For example, a record was set during the Soccer World Cup when fans wrote just under 3 000 tweets per second in the 30 second period after Japan scored against Cameroon on 14 June 2010. Twitter is thus great for keeping track of donations coming in during a fundraising drive, or for updating happenings as they occur, as it gives up to the minute, 'real time' communication to potentially huge networks of people.

You can also enhance your Twitter experience with the useful application 'TweetDeck', which can be downloaded free from www.tweetdeck.com. It takes a few minutes to set up and understand, but the short investment in time pays dividends in the long run, with vastly improved usability over the standard Twitter website interface.

Exercise: How could Twitter assist your organisation?

If you don't yet use Twitter, consider situations in the past when sending tweets would have benefitted your organisation, particularly when facing a crisis or celebrating a success (such as finding a species thought to have been extinct).

- How would you have worded your maximum of 140 character message (tweet)?
- Looking forward, where do you feel that Twitter could assist in the following areas:
 - Awareness around conservation.
 - Marketing your organisation.
 - Fundraising for a specific need.



YouTube

YouTube is a free video-sharing website allowing users to upload and share video files and slide-shows that they film and produce themselves. Anyone can view a YouTube video, providing their computer has the free Flash player software installed. By May 2010, YouTube videos exceeded two billion views a day. Most users of online social media have YouTube viewing software installed.

Does your organisation have an interesting story to tell? Do you have funny, entertaining or emotionally impacting video footage that you can share to promote biodiversity conservation and your NPO? YouTube video footage can easily be embedded into your website, blog and Facebook profile. It is a powerful means of telling your story, launching a campaign to save a species and connect with your supporters and potential supporters to showcase the impact that your organisation is making and what its current needs are.



Although we have a website, we have not fully harnessed the potential of social media networking mainly due to the demands on our small staff. Some participants on our hikes load photographs onto their Facebook pages and some link these to our Facebook site and website. We've found our Facebook site to be an excellent medium to feature news and photographs. Generally, the public does not have the time to read reams of information. The website is excellent for those that are serious about the information they want to gather whereas Facebook is a friendly everyday form of communication. We've learnt that it's a huge amount of work to achieve the 'right' website. We must commit to keeping it updated. By having a good and content rich website, we can save our time by referring people to our site.

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SANBI Biodiversity Series

1. Conserving South Africa's plants: a South African response to the Global Strategy for Plant Conservation. 2006. C.K. Willis (ed.). ISBN 1-919976-28-0.
2. The Convention on Biological Diversity: biodiversity, access and benefit-sharing. A resource for teachers (Grades 10–12). 2006. A. Solomon & P. le Grange. ISBN 1-919976-30-2.
3. The Convention on Biological Diversity: biodiversity, access and benefit-sharing. A resource for learners (Grades 10–12). 2006. A. Solomon & P. le Grange. ISBN 1-919976-31-0.
4. Fynbos Fynmense: people making biodiversity work. 2006. A. Ashwell, T. Sandwith, M. Barnett, A. Parker & F. Wisani. ISBN 1-919976-29-9.
5. A plan for phylogenetic studies of southern African reptiles: proceedings of a workshop held at Kirstenbosch, February 2006. 2006. W.R. Branch, K.A. Tolley, M. Cunningham, A.M. Bauer, G. Alexander, J.A. Harrison, A.A. Turner & M.F. Bates. ISBN 1-919976-33-7.
6. Invasive alien flora and fauna in South Africa: expertise and bibliography. 2007. C.F. Musil & I.A.W. Macdonald. ISBN 978-1-919976-35-8.
7. Project planning: tools for biodiversity conservation and development projects. 2007. Cape Action for People and the Environment. ISBN 978-1-919976-37-2.
8. Bird Checklist for South Africa's National Botanical Gardens. 2008. C.K. Willis, O.E. Curtis & M.D. Anderson (compilers). ISBN 978-1-919976-41-9.
9. Guidelines for Offshore Marine Protected Areas in South Africa. 2008. K. Sink & C. Attwood. ISBN 978-1-919976-43-3.
10. User profiles for the South African offshore environment. 2008. L. Atkinson & K. Sink. ISBN 978-1-919976-46-4.
11. Monitoring and evaluation: tools for biodiversity conservation and development projects. 2008. C.-A. Foulis & J. Whitehead. ISBN 978-1-919976-47-1.
12. Amphibians of the Taita Hills / Amfibia wa milima ya Taita. 2009. G.J. Measey, P.K. Malonza & V. Muchai. ISBN 978-1-919976-49-5.
13. South African Red Data Book: butterflies. 2009. G.A. Henning, R.F. Terblanche & J.B. Ball. ISBN 978-1-919976-51-8.
15. The introduced terrestrial Mollusca of South Africa. 2010. D.G. Herbert. ISBN 978-1-919976-56-3.
16. Butterflies of South Africa's National Botanical Gardens. 2010. C.K. Willis & S.E. Woodhall. ISBN 978-1-919976-57-0.
17. Environment & Economy: Mind the Gap. Environmental and Resource Economics Conference Synthesis Report. 2010. A. Nahman (Compiler). ISBN 978-1-919976-62-4.
18. Pollen wasps and flowers of southern Africa. 2010. S.K. Gess & F.W. Gess. ISBN 978-1-919976-60-0.
19. Ensuring a future for South Africa's frogs: a strategy for conservation research. 2011. G.J. Measey (ed.). ISBN 978-1-919976-63-1.
20. Fundraising and marketing: tools for biodiversity conservation and development projects. 2011. Cape Action for People and the Environment. ISBN 978-1-919976-67-9.

Enquiries

SANBI Bookshop, Private Bag X101, Pretoria, 0001 South Africa.

Tel.: +27 12 843 5000

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