

# 2013-4



Annual Report

Southern Africa Institute of Fundraising

## Contents

Page 2: Organisational Overview

Page 3: Chairperson's Note

Page 4: Western Cape Branch Report

Page 4-5: KwaZulu-Natal Branch Report

Page 5: Gauteng Branch Report continuation

Page 6: National Council Office Bearers

Page 6: 2013 Biannual Convention Committee

Page 6: 2013 SA Fundraising Awards Committee

Page 7: AFS 2013 Accounting Officer Report

Page 8: Statement of Financial Position

Page 9-10: Statement of Comprehensive Income

Page 11: Western Cape branch financials

Page 12: KwaZulu-Natal branch financials

Page 13: Gauteng branch financials

Page 14: SAIF Fellowship Awardee 2013

Page 15-16: A note from our Members

*Annual Report Layout & Design by Apinda Mpako*

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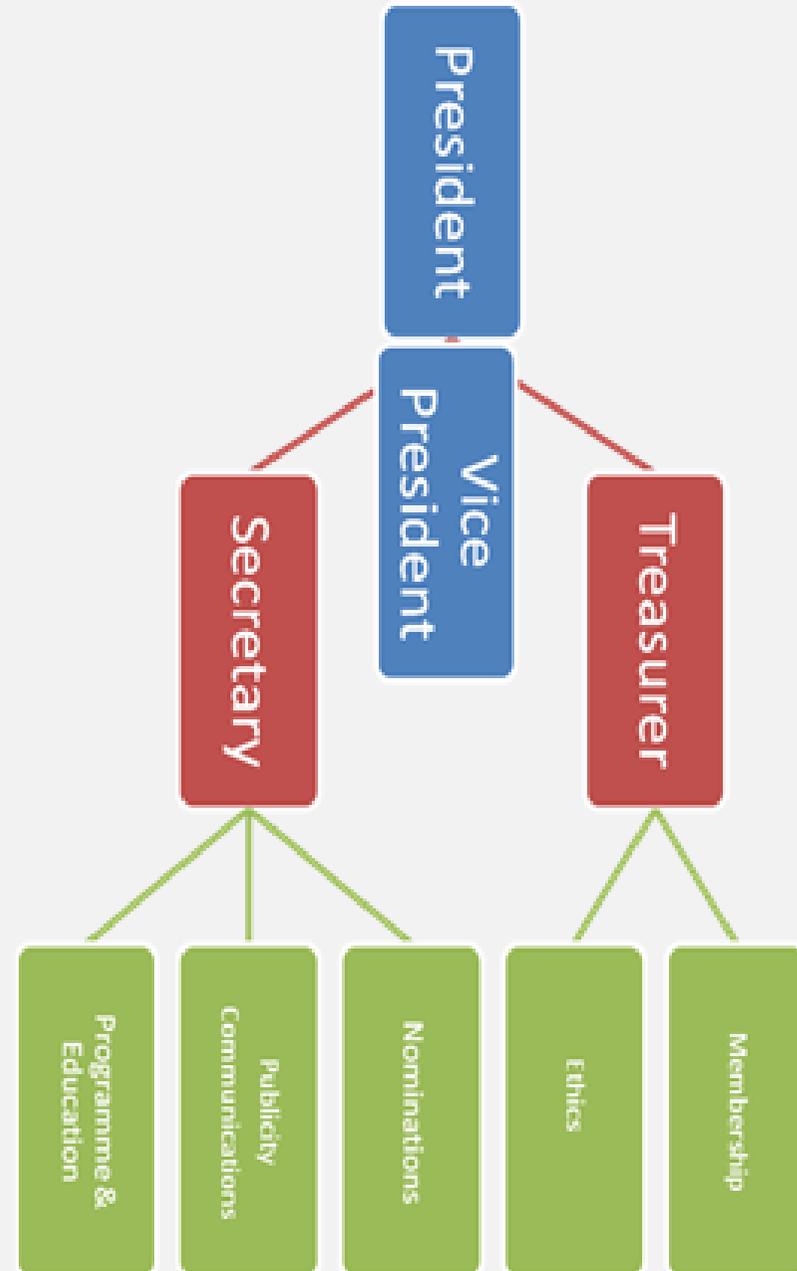
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## Organisational Overview

The Southern Africa Institute of Fundraising was conceptualised in 1985 by a group of concerned fundraisers who felt the need for an organisation which would effectively promote and uplift the fundraising profession. After numerous informal meetings, a Constitution was signed in November 1987 and SAIF was launched as a voluntary association. SAIF is the only body representing the fundraising profession in Southern Africa. It is registered as a Non-Profit Organisation with the Department of Social Development.

**National Council:** The SAIF National Council is responsible for the management and policy-making functions of the Institute at a national level and is the legal entity for the structure. Office bearers are elected on an annual basis at the Annual General Meeting in terms of the Constitution. These are: President, Vice-President, Secretary, Treasurer, the Branch Chairpersons and one representative of each SAIF branch and seven elected members at large. The Council meets on a regular basis by means of a teleconference and in person.

**Branches:** In a city or area where a significant need is required by the non-profit sector, SAIF members are encouraged by National Council to establish a Branch in order to promote the objectives of the Institute and to offer mentoring and support to individuals. Volunteer Committee members meet on a regular basis and arrange a series of activities; seminars, workshops, presentations that will benefit and uplift the sector as a whole. In smaller areas a SAIF branch encourages the creation of Forums - these can be lunches or breakfast events that offer opportunities for mentoring and an exchange of ideas.



## Chairpersons' Note

At the Biannual Convention of 2013, the Southern Africa Fundraising Awards Committee endeavoured to reward the work of outstanding fundraisers. After many hours of hard work behind the scenes, we proudly presented to winners in their various categories with Louise Driver awarded as the Fundraiser of the year!

We have also had another successful Convention although the numbers of attendants had dropped significantly, which is indicative of the economic climate we find ourselves in.

National Council has faced a number of challenges: Constitutionally we must have a national secretary (Carla resigned in October 2013), there is a lack of representation on the Council as we need a minimum of 12 members and currently only have 10.

It has been found that the Term of office of President and other Office Bearers is too short and this will be addressed in the Constitution.

Proposed amendments to the Constitution were presented for approval at last AGM but not enough members voted (need 2/3 vote to change the Constitution). More than 40 amendments have been noted for the improvement of the Constitution – some major, some minor. Initially, we thought we could do this internally but will need external assistance from a legal expert. As soon as the financial situation of SAIF improves, we will continue with this process.

As the need in South Africa for Fundraisers to attain fundraising qualifications continues, various conversations have been held with international organizations in order to establish learning pathways for professionally recognised qualifications.

We continue to investigate and work on establishing vocational based and accredited training for career pathways.

The following were accomplished as an outflow from the April 2013 strategic meeting:

- Marketing Strategy
- Improved payment processes such as GivenGain online payment portal
- Continuous conversations re IWRM conferences
- New membership forms
- Upgraded newsletter and image quality
- Electronic membership certificates
- Welcome emails
- Regular updating of website
- Bookkeeper retained and UBBS appointed for Audit

It has been my desire to see our membership base increase and specifically to see branches established in the Eastern Cape, Limpopo, Mpumalanga and the Free State. In order to have a branch established we need at least 25 members within a region. The Limpopo representatives are working towards establishing and launching the Inland branch.

The Western Cape, Gauteng and KZN branch committees have been active in presenting excellent and very relevant training sessions and we encourage you to join with SAIF in your Province.

**Annemarie Barnard,**  
**SAIF President**

## Branch Reports

### Western Cape...

During the year the committee focused its attention on looking critically at how to help grow SAIF membership and increase benefits to members.

We started by conducting a full review of trainings and workshops available to fundraisers locally. We've asked the question: – “how does someone decide which training course to attend and which one offers the best investment of time and money?” We also asked why, if there are so many trainings available and new courses available, are organisations struggling to find and retain good fundraisers and why are fundraisers feeling increasingly isolated and under pressure?

Our conclusion is that SAIF is as relevant today as it was in 1985, because unlike other networks or the internet, it can play a direct and unique role in helping individual fundraisers to develop and advance their careers and support NPO management to find, retain, remunerate and adequately resource the fundraising team.

However we believe that the organisation needs to critically look at how the organisation delivers this advice, support and mentoring so as to ensure that as a professional body we truly grow, develop and professionalise this sector.

In order to help bring about this change, the WC committee drafted a resolution, which essentially recommended that it refocuses its strategic aims and objectives so as to increase the benefits to individuals and amends the constitution to support this.

The resolution was unanimously approved at the SAIF WC AGM and submitted to SAIF National Council for discussion at the SAIF National AGM.

We believe passionately that fundraisers play a critically important role in enabling non-profit and non-governmental organisations to carry out their work. Whether full-time, part-time or volunteer, fundraisers are responsible for finding innovative, creative and cost-effective ways to inspire people to give of their time, skills and wealth to support thousands of organisations, which play a significant role in addressing the myriad of social challenges facing Southern Africa.

**Sarah Scarth - Chairman, Western Cape**

### KwaZulu-Natal...

The KZN AGM, held in June, was well attended with new members signing up to join SAIF. Ann Bown presented the 7 Steps to Sustainability and Damon Beard (East Coast Radio DJ) shared his fundraising experience with us. Sheila McCullum's presentation on Social Media was impactful and gave us some valuable tips and ideas.

In order to ensure that members feel connected to SAIF, each committee member has a list of members and they are challenged to make personal contact with them as often as possible.

KZN finances are strong owing to the fact that we have had many successful workshops over the year.

## Branch Reports

We have a revolving events calendar and try to ensure that we have a training session in DBN and PMB once a month. There will be a break from November to March due to the holidays and in anticipation of our Convention in March.

A KZN survey was conducted in August to KZN SAIF members in the region to establish what they would like to hear presentations on at the one day Convention planned at Assegai Hotel on 11 March 2014. We still await final responses to this. Members were incentivised to respond.

KZN Convention plans are moving along well with the venue having been secured. By the end of October we hope to have our guest speakers in place and a title for the Convention. We would like it to be a Proudly South African convention and attract 200 delegates.

**Linda Hill - Chairman, KwaZulu-Natal**

## Gauteng...

It has been a difficult year for the SAIF Gauteng Branch.

We welcomed new members after the 2013 Convention and hope they will remain with us for many years to come. Our branch membership is more than 45% of the total SAIF membership in Gauteng-based.

The committee is weak in capacity with many often not attending meetings and picking up their share of responsibilities. Often events are coordinated and arranged by three people.

The free AFP membership that our members qualify for is a great benefit. The regular fundraising information we receive and the networking you can do with international fundraisers is invaluable.

If SAIF membership is not renewed the AFP membership will be cancelled as this a specific SAIF benefit.

Training needs and other ideas are always encouraged from individuals – this is the only way we can improve our offerings and meet expectations.

Let's continue to perform as we did in the past and become the strongest committee serving the greatest number of members.

I need to thank Apinda for her help with the training arrangements and committee members Sanet, Teboho, and Oliver for their help in keeping the Gauteng branch alive.

**Zai Miller**

**Chairman, Gauteng**

## National Council Officer Bearers

Annemarie Barnard - President  
Diana Milford – Vice President  
Kathy Jooste – National Treasurer  
Zai Miller – Gauteng Chair  
Teboho Nkoana – Gauteng Representative  
Michael Deegan – KZN Chair  
Wendy McLeod – KZN Vice-Chair  
Sarah Scarth – Western Cape Chair  
Tim Smith – Western Cape Vice-Chair  
Matjie Masha – Inland Branch Representative  
Shilela Matjie – Inland Branch Representative  
Carla Ferreira – National Secretary (resigned)  
Colin Habberton – Western Cape Chair (resigned)  
Rose Pollard – Gauteng Rep (resigned)  
Oliver Quambusch – Gauteng Rep (resigned)

## 2013 Biannual Convention Committee

Zai Miller - Chairperson  
Oliver Quambusch  
Elrina van Schaardenburgh  
Rose Pollard  
Kathy Jooste  
Apinda Mpako  
Town & Country Conferences

## SA Fundraising Awards Committee

Apinda Mpako - Project Manager  
Carla Ferreira – Communications  
Anita Adendorff - Designer  
Colin Habberton - Partnerships  
Sarah Scarth - PR and Marketing  
Lianne Byrne - Digital Marketing  
Fezeka Maqwati - Funding Proposals  
Oliver Quambusch - Sponsorships  
Annemarie Barnard - Finance  
Ann Bown - Oversight  
Zai Miller - Convention Liaison

# ANNUAL FINANCIAL STATEMENTS AS AT 31 MARCH 2014

## Accounting Officers Report

Melany Lottering  
Chartered Accountant (SA)  
(Membership No 00290293)  
P O Box 16483  
Dowerglen  
082 469 2606

**REPORT OF THE ACCOUNTING OFFICER**  
**SOUTHERN AFRICA INSTITUTE OF FUNDRAISING**  
**31 MARCH 2014**

I have performed the duties of an accounting officer for the above mentioned organisation. The annual financial statements set out on page 1 – 10 are the responsibility of the National Council members. No audit or external review was conducted. Accordingly I do not imply or express an opinion or any other form of assurance on the annual financial statements.

I have however determined that the annual financial statements are in agreement with the accounting records, and have done so by adopting such procedures and conducting such enquiries in relation to the accounting records as I considered necessary in the circumstances. I have also reviewed the accounting policies which have been represented to me as having been applied in the preparation of the annual financial statements, and I consider they are appropriate to the business.

M Lottering  
Chartered Accountant (SA)



## Statement of Financial Position

	Note	2014	2,013
		R	R
<b><u>ASSETS</u></b>			
<b>Non Current Assets</b>			
Property, plant and equipment	1	1	1
		<u>1</u>	<u>1</u>
<b>Current Assets</b>			
Trade and other Receivables	2	23,720	12,000
Cash & Cash Equivalents	3	146,609	202,754
		<u>170,329</u>	<u>214,754</u>
<b>TOTAL ASSETS</b>		<u>170,330</u>	<u>214,755</u>
<b><u>EQUITY</u></b>			
<b>Shareholders Equity</b>			
Reserves		18,625	28,626
Retained Income		(55)	87,740
		<u>18,570</u>	<u>116,366</u>
<b><u>LIABILITIES</u></b>			
<b><u>Current Liabilities</u></b>			
Trade and other Payables	4	151,760	98,389
		<u>151,760</u>	<u>98,389</u>
<b>Total Liabilities</b>		<u>151,760</u>	<u>98,389</u>
<b>TOTAL EQUITY AND LIABILITIES</b>		<u>170,330</u>	<u>214,755</u>

## Statement of Comprehensive Income

	Note	2014	2013
		R	R
<b><u>REVENUE</u></b>			
Annual Convention		537,605	
Fees & Subscriptions		67,514	89,313
Workshops		29,120	
		<b>634,239</b>	<b>89,313</b>
<b><u>OTHER INCOME</u></b>			
Interest Received		124	40
Other Income		4,250	16,284
		<b>4,374</b>	<b>16,324</b>
<b><u>OPERATING EXPENSES</u></b>			
Accounting Fees		7,562	14,610
Administration and management fees			92,925
Advertising and promotion		5,420	2,910
Bank Charges		6,421	1,912
Convention expenses		572,999	7,000
Computer expenses		1,025	2,438
Depreciation			556

	Note	2014	2013
		R	R
Employee costs		139,000	
Entertainment		603	300
Insurance		4,880	4,682
Motor Expenses		250	
Printing, Stationery & Postage		200	5,709
Professional Fees		7,840	
Rent & Utilities		18,500	10,934
Special Projects Officer			14,000
Telephone		21,258	9,873
Travel		9,551	(758)
Website Management		16,200	30,745
Workshop Costs		14,048	
		<b>825,757</b>	<b>197,836</b>
<b>Surplus / (Deficit)</b>		<b>(187,144)</b>	<b>(92,199)</b>
Taxation	5		
<b>Surplus / (Deficit) after taxation</b>		<b>(187,144)</b>	<b>(92,199)</b>
Retained Income from previous year (incl Gauteng)		187,089	179,939
Total carried forward		<b>(55)</b>	<b>87,740</b>

## Western Cape Branch Financials

### SALES

Income - Workshops	<u>8,243.00</u>	8,243.00
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### COST OF SALES

Workshop expenses	<u>3,453.83</u>	<u>3,453.83</u>
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<b>GROSS PROFIT / (LOSS)</b>		<b>4,789.17</b>
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### EXPENSES

Administration Expenses	5,000.00	
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Bank Charges	1,046.69	<u>6,046.69</u>
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<b>NET PROFIT / (LOSS) BEFORE TAX</b>		<b>(1,257.52)</b>
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<b>NET PROFIT / (LOSS)</b>		<b><u>(1,257.52)</u></b>
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## KwaZulu-Natal Branch Financials

### SALES

Income - Workshops	<u>4,668.60</u>	4,668.60
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### COST OF SALES

Workshop expenses	<u>8,441.30</u>	<u>8,441.30</u>
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<b>GROSS PROFIT / (LOSS)</b>		<b>(3772.70)</b>
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### OTHER INCOME

Membership Fees	<u>3,261.00</u>	<u>3,261.00</u>
		(551.70)

### EXPENSES

Bank Charges	621.62	
Membership Fee Transfer to NO	2,037.00	<u>2,658.62</u>

<b>NET PROFIT / (LOSS) BEFORE TAX</b>		<b>(3,170.32)</b>
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<b>NET PROFIT / (LOSS)</b>		<b><u>(3,170.32)</u></b>
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## Gauteng Branch Financials

### SALES

Income - Workshops	7,725.00	
Other Income	<u>4,250.00</u>	11,975.00

### COST OF SALES

Workshop expenses	<u>9,260.08</u>	<u>9,260.08</u>
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<b>GROSS PROFIT / (LOSS)</b>		<b>2,714.92</b>
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### OTHER INCOME

Interest Received	<u>80.66</u>	<u>80.66</u>
		2,795.58

### EXPENSES

Accounting Fees	3,686.00	
Bank Charges	1,363.39	
Computer Expenses	1,025.00	
Travel & Accommodation	<u>3,107.90</u>	<u>9,182.29</u>

<b>NET PROFIT / (LOSS) BEFORE TAX</b>		<b>(6,386.71)</b>
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<b>NET PROFIT / (LOSS)</b>		<b><u>(6,386.71)</u></b>
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## SAIF Fellowship Awardee 2013



Jenni McLeod started with the Response Group in 1984 and launched Downes Murray International with Michael Downes and Terry Murray in 1987. For those that know her you will agree that it's not often we have an opportunity to congratulate one of our own for 30 years of service excellence to the fundraising profession.

Jenni has always displayed exceptionally high standards of service to the NPO's she has worked with and to the industry as a whole. Over the years she was a member of the SAIF National Executive and KZN Chairman for a period. Jenni's a very knowledgeable and internationally respected fundraising professional and was recently recognised with the SAIF Fellowship Award for Service to the Industry.

Jenni has spent some time in Australia and the USA, gaining valuable experience and has managed many successful fundraising programmes in South Africa and abroad. She is probably the most experienced and versatile fundraising specialist in the country with a passion for her work and the causes with whom she has been involved.

Jenni's commitment to improving the skills of fundraisers and the success of their programmes is without question. Her enthusiasm for fundraising and her professionalism constantly shine through. Jenni has put DMI on the map as the thought leaders in fundraising in South Africa.

*Ethics isn't just a list of do's and don't's. It's not a scorecard of ethical behavior. It's guidance. It can be a source of inspiration. It's a statement of our values and what we want society to look like. It can mean many different things to each of us at different points in our professional careers.*

*Andrew Watt – AFP President/CEO*

## A note from our Members

At Vuleka School we ensure that the Fundraising Team are members of the Southern Africa Institute of Fundraising. This provides us with a network of people with the same mission and vision.

SAIF have always provided very resourceful and informative conferences and seminars where we have an opportunity to network with others in our industry, learn new and innovative fundraising and marketing strategies, and are kept up-to-date with the legislation and regulations related to our industry.

The SAIF team has always been professional and friendly and looks out for the interests and needs of the 'fundraising community'.

**Angela Raldini, Vuleka School**

I have been a member of SAIF for the past 10 years and have found my membership invaluable for the following reasons:

- both I and the organisation I work for have benefitted enormously from the wealth of training opportunities SAIF offers at a minimal cost;
- being a member allows me to network with other members to share experiences or knowledge;
- as a member of SAIF it reinforces my own ethical standards and practices which is critical for a fundraiser.

**Desiree Behr, Oasis Association**

## A note from our Members

SAIF is the moral compass for fundraisers in the region. Ahead of its time in counselling against the ethically questionable minefield of commission based fundraising, it has punched above its weight in the dynamic and evolving non-profit arena.

Southern and South Africa, civil society and our embryonic democracy are enriched by institutions such as SAIF. It has been part of my life for 22 years while I have raised over R2 billion and written 27 books. I recommend that anyone involved in mobilizing resources for developmental and charitable initiatives becomes a member of SAIF.

**Jill Ritchie, Papillon Press**

I am a Founder Member of SAIF and have many wonderful memories of the Conventions, Events, Seminars & Workshops that have taken place since its founding in 1986.

More importantly, I had the privilege to be associated with and learn the “profession” from and with many well-known and famous Fundraisers both here and abroad.

I also “fell into fundraising by accident” and soon realised that fundraisers are a “special breed” of individuals – who labour on their own and take responsibility for the well-being of their organisations with little guidance but great expectations.

The Institute became a refuge and a source of learning for my personal development because we were able to openly share challenges, information and knowledge – and from that, I learned that by sharing what I knew, I would be helping “twice” the number of people.

The spirit of sharing still pervades the Institute and, as Consultant today, I have no hesitation in recommending and referring those I cannot help, to others within the Institute.

**Joe Araujo, Joe Araujo Consulting c.c**