This handbook was commissioned by the World Society for the Protection of Animals (now World Animal Protection) when the organization was still built around member societies.
PART 3

Running an Animal Protection Society

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It is important that in-depth analyses are carried out before a new society is started and that very careful consideration is given to all issues.
CHAPTER 12
ESTABLISHING A SOCIETY

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Establishing an animal protection society is a serious commitment that will take enormous energy and dedication and seriously impact all aspects of your life. All too often, animal protection work simply takes over our lives. This can be rewarding, but it can also be physically and emotionally exhausting.

Anybody considering establishing an animal protection society should, at a minimum, read the HSUS guidance booklet (please see ‘Further Resources’ section for the reference). As the HSUS guidance advises:

“It is important that in-depth analyses are carried out before a new society is started and that very careful consideration is given to all issues. Some animal protection organisations that start up without the right analysis and understanding can actually hamper existing animal protection activity or damage the welfare of the animals (for example, by sheltering in awful conditions). Others simply duplicate or confuse messages. This is why it is vital to research and plan carefully.

This chapter offers practical advice to assist you in the process of deciding which issue to tackle, what approach to take and what you need to bear in mind when it comes to establishing a board of trustees/committee and drafting a governing document.

The aim is to identify the issue that would make best use of an organisation’s resources towards ensuring the maximum improvement for the plight of animals.

An examination of the following will help in this process:

- Other existing animal protection societies in your area, if any
- The range of potential animal protection problems that could be tackled and the likelihood of success
- The resources of your prospective organisation – both human and financial.

These three topics are considered individually in the sections that follow.

### a) Analysis of Other Animal Protection Societies

The first step in the process is to find out whether there are already animal protection societies in your country (see the World Animal Net link, where you can search for all societies in your country). If there are existing societies, then try to learn more about these groups: the areas of work they cover, their approaches, methods and levels of success. If possible, meet with them to find out even more.

Key questions include:

- Are these organisations potential competitors or collaborators?
- How will you avoid wasting scarce animal protection society funding through duplication or competition?
• How will your organisation differentiate itself in the animal protection society ‘marketplace’?
• What is your unique role?

Bear in mind that it may be more productive to join and strengthen their efforts, rather than duplicate their work.

b) Analysis of the Status of Animal Protection
The next step is to examine the range of animal protection problems that could be tackled.
If you intend to work nationally, then a good research tool is to prepare a report on the status of animal protection in your country, covering the main animal protection issues.

A full analysis of the ‘status of animal protection’ should be carried out for each of the issues the organisation is considering from the following main headings:
• Companion Animals
• Farm Animals
• Wildlife
• Working Animals
• Animals in Entertainment
• Animal Experimentation
• Disaster Relief.

The status report should analyse:
• Major welfare problems
• Numbers of animals affected
• Severity and duration of the welfare problem
• Legislation – existing and proposed national legislation, conventions and regional or international agreements, enforcement issues
• Legislative system or processes – level of democracy, openness, consultation, success of consumer pressure etc.
• Existence of an Animal Welfare Committee (or subject-specific Animal Welfare Committees such as a Farm Animal Welfare Committee etc.)
• Government contacts
• Likely success with the issue
• Major threats and opportunities
• Educational opportunities
• Campaigns and media potential
• Industry initiatives and training etc.
• Financial opportunities (tenders for stray control for example)

It is most important to compare the numbers of animals involved and the level and duration of their suffering, because all too often organisations think that the issue they are aware of, or the issue that is most visible (such as stray animals) is the most serious, and they feel compelled to act on these, without due consideration. An organisation may decide to be a single-issue group or tackle multiple issues, in which case it will have to decide a level or priority for each issue.

Some organisations also carry out investigations into the most promising issues – visiting and recording actual situations. The combination of analysis and investigation can form a powerful backdrop to any future work on the issue, it can provide useful information about the issue and approach to be adopted, and can be useful in attracting supporters.

c) Organisational Analysis
Finally, an honest assessment of your own resources and capabilities, both human and financial, should be made. Assess your strengths, weaknesses and the assets at your disposal.
Then consider these against the animal protection issues that you have analysed, in order to make an assessment of how the organisation can best help.

Some of the factors to consider include:

- Number of staff
- Skills and abilities of staff (for example, there is no point in analysing or choosing companion animals as an issue, if your organisation involves highly skilled marine biologists!)
- Location and size of office
- Financial resources
- Whether you are an animal rights or animal welfare organisation
- Whether you want to campaign for social change, educate, or undertake service provision work
- Whether you are part of a regional or international network.

Weighing up the outcomes of the three analyses outlined above will facilitate your decision as to which issue your organisation should tackle. The next step is to determine HOW to go about it. The following section considers the various approaches available.

**DETERMINING THE BEST APPROACH**

Dealing with the sad end results, without tackling the root of the problem, is soul-destroying and counter-productive. This tendency to deal with end results, rather than tackling the roots, is symptomatic of the animal protection movement (probably because the compassion felt for the end results leads to such approaches). However, the aim should be total resolution of a problem, and this can only be reached by tackling, and stemming, the problem at source.

**WHATEVER YOU DECIDE TO DO, BEAR IN MIND THAT IT IS MORE EFFECTIVE TO TACKLE A PROBLEM AT ITS ROOT.**

**a) Categories of Animal Protection Activity**

There are three main approaches to tackling an animal welfare problem:

- Service delivery
- Campaigning and lobbying
- Education.

**Service delivery**: The largest and most prominent animal protection societies, including the SPCAs, are those that provide animal protection services, such as stray control, euthanasia, sheltering, fostering, re-homing, veterinary care for animals of the disadvantaged, disaster relief and rescue, inspection and enforcement, training, instruction and advice on animal protection issues (in particular to the authorities).

**Campaigning and lobbying** to improve the status and welfare of animals. Campaigning is considered the ‘engine for social change’ and has already resulted in some groundbreaking changes for animals. Lobbying can be highly effective at securing improvements to the laws protecting animals.

**Education**: The purpose of humane education is to sensitisate individuals to the plight of animals, thereby generating empathy and improving the treatment of animals. It is a long-term investment that changes both the practical treatment of animals and the social climate in favour of change.
b) Factors Influencing Your Approach

THE AIM IS TO IDENTIFY THE APPROACH THAT WILL MAKE BEST USE OF AN ORGANISATION’S RESOURCES TOWARDS ENSURING THE MAXIMUM IMPACT FOR THE CHOSEN ISSUE.

Much of the analysis carried out to decide which issue to tackle will also assist in deciding on which approach to take.

The following need to be considered:

**Resources available:** The organisation’s resources, both staff and financial, as well as its particular strengths and skills. This is an important part of the decision. There is no point in deciding that you want to start an animal shelter, if you do not have the finances or the skills needed to do this.

**Nature of the problems to be tackled and the issue:** The analysis of the status of animal protection should highlight vulnerable areas to target. An analysis of feasibility can be added, examining different approaches. This could include important factors such as:
- The numbers of animals likely to be saved or helped by the chosen approach
- The likelihood of long-term beneficial change (contribution towards social change).

**Issues already covered by other animal protection societies:** Look at the issues other animal protection societies work on (if relevant) and the methods and approaches they use. Avoid creating unnecessary duplication or competitive tension in the movement. The aim should be to fill an unmet need.

**Situations specific to your country and culture:** For example, in some countries campaigning is not yet fruitful (because of low levels of democracy for example), in others it may not be permitted to run an animal shelter (as was the case in some former Communist countries in Eastern Europe). You need to examine your own situation, against the possible approaches you could take on your chosen issue.

**Cost:** The full cost of likely approaches should be evaluated and weighed against the likely end results (short and long-term). This may appear mercenary, but it is the only way to ensure that you are using your resources to save as many animals as humanly possible.

Amongst all this logical analysis, there also needs to be some creative vision and inspiration. Some organisations feel driven to work in a certain way. In this case, the organisation has to be built with this objective in mind and any shortcomings rectified to ensure that it is able to cope with its chosen mission.

Deciding which approach to take is a balance of all the above factors. The analysis is relatively simple, compared to the choice!

The next section deals with harnessing the research and resources you need to tackle your chosen issue in the way you have decided.
Detailed plans are needed before you can harness resources. But before you can put together an authoritative plan, you need to research your chosen issue and approach thoroughly and pull together all the relevant information. The following information is intended to assist you in this process.

**Research** is of utmost importance. It is the foundation for all professional activity. In campaigns work, it ensures a thorough understanding of the political and consumer environment, which is vital to the preparation of a targeted campaign with potential to succeed. In service delivery work, it is essential to ensuring the provision of the most appropriate and effective programmes, at the most competitive cost. In educational work, it can help to ensure that educational messages are appropriate, usable and reach target audiences effectively. Well-targeted research can help animal protection activity to succeed without wastage of time or money.

Research is also required to ascertain what, if any, are the legal requirements for setting up and operating a NGO in your country. Every organisation should make a point of researching, and following, the legal requirements its country (or its Charity regulatory body) imposes. This should include aspects of company law, charity law, financial law, health and safety requirements and employment law. If in doubt, legal advice should be sought.

**Meetings and consultations:** Once the available information has been collated, it is helpful to arrange background meetings and fact-finding consultations. These could include potential partners, competitors or anybody involved in the issue or the fight against it such as government, industry, academics, scientists, cultural and religious bodies, vets, lawyers, biologists and other NGOs. This may lead to a greater understanding of areas to target or avoid, driving factors of the problem, relevant political and legislative factors and potential collaborators and competitors. It may also create a more realistic picture of the obstacles you will have to overcome!

**Staff resources:** You need to make a full and honest assessment of your staff and volunteer resources, including skills, expertise, strengths and weaknesses. This will help identify areas that need recruitment and/or training and development.

**Financial resources:** All the information you gather will help you put together a proper business plan, including a well-prepared budget and project proposal(s). A business plan is an extension of your mission statement (which is explored in the chapter on ‘Strategy’); without a business plan, it will be extremely difficult to fundraise and apply for grants. The various methods of fundraising are examined in the separate chapter on ‘Fundraising’.

It is essential that you check if there are any legal requirements for NGOs in your country. In many countries, NGOs are legally required to have a board of trustees or a committee. Some countries stipulate further requirements; for example in Brazil NGO board members must be residents in Brazil. Whatever the legal requirement, NGOs do traditionally have boards for moral reasons. As NGOs raise money from the community, it is appropriate that elected individuals from that community oversee the use of that money and ensure that it is used in line with the NGO’s objectives and the community’s needs. Simply put, NGOs should have boards to ensure that the NGO is acting responsibly. This is not to say that workers in an NGO can’t be trusted, just that it is very difficult...
for the same person to ‘do’ and to check what’s being done, this should really be carried out by two different sets of people.

The board takes responsibility for the governance of an NGO and usually includes a chair/president, a treasurer, a secretary and general board members. Its main role is to publicly represent the NGO in a positive manner. Board members should help mobilise resources and open doors; they should be influential and share the same vision outlined in the mission statement. Obvious examples include: a local government officer, someone within the local or national education system, a prominent and respected businessperson, someone from a larger animal welfare organisation, someone from another type of NGO in the community (like the chief exec of a children’s charity) or someone from the veterinary profession.

The NGO must stipulate exactly how much responsibility the board members have, how they are elected and removed, and how and when they should meet etc. These provisions should be included in the society’s governing document.

**PREPARING A GOVERNING DOCUMENT**

A society’s governing document sets out the society’s reason for being and clarifies its intent. It is the ‘instruction manual’ for the NGO, which sets out the rules under which the society will operate. Again, it is important to become familiar with the legal requirements for setting up an NGO and the relevant legislation, prior to preparing a governing document.

A governing document can be referred to in a number of ways, depending upon the law of a particular country. Common names include constitution, by-laws, memorandum and articles of association and statute.

The governing document should contain all the provisions necessary for the effective and efficient running of an NGO, including:

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**The NGO name:** The name is important. It is the most remembered and recognisable feature of an organisation, and it forms the basis of the public’s first impression of the NGO. It is therefore important that the name accurately reflects the organisation’s purpose and is sufficiently different from other NGO names to avoid confusion. In addition, the name must not include a word or expression that might cause offense.

**Objectives** should be clear and understandable and reflect what the organisation intends to do.

If the organisation is to benefit a particular species or group of animals this should be made clear.

If the benefits of the organisation are to be confined to a particular geographical area, this should also be clarified.

**Powers:** Committee members will need some powers, which they can use to help them meet the objectives of the NGO; this can include, for example, the power to raise funds and receive contributions, the power to buy or lease any property, and to maintain and equip it for use.

**Membership** is normally open to any individuals or organisations interested in furthering the NGO’s objectives. The governing document should explain:

- Whether any membership subscription is payable
- How people apply for membership and the criteria for acceptance
• Whether members have any voting rights
• How membership may be terminated by the committee. (Termination should only happen for good and sufficient reason, and the individual should have the right to be heard before a final decision is made).

Committee members: The governing document should stipulate how many committee members there will be, how they will be appointed and how long they are appointed for. It is usual for committee members to be appointed by the members of the NGO at its annual general meeting. The first committee members may be the people who formally adopt the governing document.

Meetings: The governing document should explain:
• The minimum number of committee meetings that will be held each year (the committee members of even small organisations usually meet at least twice a year)
• The procedure for calling emergency/special meetings
• The procedure for electing the person who will be in control of the meetings, – the meeting ‘chair’
• The minimum number of committee members who need to be present if a meeting is to be valid. (Usually when there are 3-5 committee members, the minimum is 2, but if there are 6-9 committee members, the minimum is 3).

Finance and accounts: All organisations need to keep complete and accurate accounts showing their income and expenditure. Annual statements of accounts for the NGO and an annual report should be produced.

The governing document should give details of the bank account and should state that the assets are to be held in the name of the NGO (not in the name of a committee member).

The number of signatories for cheques should also be stated in the governing document; usually at least two people sign cheques, one of whom should be a committee member.

Amendments: It is important that the governing document sets out a procedure for making amendments to it, as there are likely to be occasions when changes need to be made to meet the changing needs of the NGO.

Dissolution: There may come a time when an NGO cannot continue operating, so the governing document should explain:
• How the NGO may be dissolved
• What happens to any remaining assets (wherever possible they should be passed onto another NGO).

The governing document is normally put into operation by being adopted at a formal meeting of the new committee and general members. The final typed version should be signed by all the committee members and dated the day of the meeting at which it was agreed. The minutes of the meeting should formally record that the governing document was adopted.
Q What are the main barriers stopping animal protection societies from becoming professional, modern NGOs?

A There are a variety of factors including:
- Lack of professional animal protection society managers (the field is small, with a limited career structure)
- The movement appears slow to adopt modern NGO management practices
- Lack of proper strategic management
- Being reactive and passive, rather than proactive and goal-focused.

However, some organisations are becoming very professional in their approach and these can be useful models. There are also effective models in other areas of NGO activity.

Q Why are there so many animal protection organisations in some countries?

A This is probably a case of the market supplying what the market needs at any particular time. However, many animal protection organisations do run out of funding. Also, as this is an activity driven by ethics and emotions, there are many different ideas and approaches.

Q What can WSPA do to help member societies become more professional?

A In addition to providing information resources, WSPA has practical experience with a wide variety of animal protection organisations, so can recommend appropriate models or contacts. Also, WSPA and some of its member societies sometimes hold training sessions, workshops and conferences for animal protection societies. These can be very useful, both in learning new skills and concepts and in exchanging ideas and experiences.

FURTHER RESOURCES

Web Sites
Charity Commission:
www.charity-commission.gov.uk/supportingcharities/default.asp
Guidance for UK charities

The Chronicle of Philanthropy
http://philanthropy.com/

Humane Society of the United States
www.hsus.org/ace/18478
Organisation and operation documents, including ‘How to Form an Animal Protection Society in Your Community’

HSUS advice on forming an animal protection society and developing a mission statement

The Nonprofit Resource Centre
http://not-for-profit.org/
PETA
www.collegeactivist.com/guide-1.asp
Starting a college group

www.animalactivist.com/actguide6.asp
Guide to becoming an activist

White Hat Communications
www.whitehatcommunications.com/nphome.htm
Online Non-Profit Information Centre – includes ‘Non-profit Handbook’ and ‘Improving Quality and Performance in Your Non-profit Organisation’

World Animal Net
http://worldanimal.net/
Includes the World Animal Net Directory of animal protection societies worldwide

Books
The Earthscan Reader on NGO Management
Michael Edwards (Editor), Alan Fowler (Editor)
Publisher: Earthscan
ISBN: 1853838489

Good Governance: Developing Effective Board-Management Relations in Public and Voluntary Organisations
C. Cornforth, C. Edwards
Publisher: CIMA (Chartered Institute of Management Accountants)
ISBN: 1874784906

How to Run a Voluntary Group: A Guide to Successful Organisation and Management
Chris Carling
Publisher: How To Books
ISBN: 1857031350

Managing a Voluntary Organisation
Sheila Evers
Publisher: The Institute of Management
ISBN: 0859462218

Striking a Balance
Alan Fowler
Publisher: Earthscan
ISBN: 1853833258
Effective Management and Organisation for NGOs

Issues in Voluntary and Non-profit Management
Julian Batsleer, Chris Cornforth, Rob Paton
Publisher: Addison-Wesley
ISBN: 0201565471
Strategy is about deciding the nature, domain and scope of an organisation’s activities and the way its success will be evaluated.
CHAPTER 13
STRATEGY

1. Introduction
2. Key Elements
3. Building a Strategy
   a) Developing a Mission Statement
   b) Research and Analysis
   c) Strategic Process
4. Strategic Review
5. The Movement and its Stages of Development
6. Further Resources
Strategic planning is vital to ensure that your organisation follows the most effective course towards its mission. Animal protection societies are bombarded with an increasingly wide and complex set of demands and it is easy to be reduced to a reactive fire-fighting organisation without a clear strategy. This invariably slows down progress towards mission completion.

Strategy is about deciding the nature, domain and scope of an organisation's activities and the way its success will be evaluated.

Essentially it is about using what you have available, in terms of money, people, potential allies etc., in the way that makes the most progress towards your objectives. It can be compared to a route map, which is needed to ensure the most direct route is taken between two points.

The underlying objective should be to maximise mission fulfilment, given available resources. This does not mean tackling everything! It means harnessing resources and leveraging them to the best effect.

A strategy can combine some or all of these factors:
- Mission Statement
- Vision
- Core Values
- Critical Success Factors
- Positioning
- Brand (Reputation)
- Operational Planning

Each will be examined in turn, as follows.

**Mission Statement**

The mission is, of course, the starting point of any strategy. We all need a vision of who we are and what we are aiming for. Then we need to decide what steps we will take to climb towards our ultimate goals.
In essence, a mission statement is the declaration of an organisation’s purpose, its *raison d’être*.

The mission is important because it can engage both the hearts (culture) and minds (strategy) of the organisation’s staff and the board. A good mission that is used well can be inspirational and develop a strong, shared organisational culture. It helps to ensure that employees are emotionally tied to the organisation and that their goals are in synchrony with those of the organisation.

Guidance on developing a mission statement is given in section 3(a), below.

**Vision**

**VISION IS THE ULTIMATE GOAL – IT PROFILES A REALISTIC, CREDIBLE AND ATTRACTIVE FUTURE.**

Vision is a longer-range idea of success and, as such, can be a powerful engine, driving an organisation towards excellence.

For most NGOs, a mission alone is probably sufficient. Indeed, it is debatable whether having both a vision and a mission dilutes and confuses what should be a powerful message of intent (particularly for external audiences). In reality, a powerfully worded mission statement will provide a clear indication of the organisation’s ultimate goal and vision because this is what will result if it achieves its organisational purpose, set out in the mission.

**Core Values** are central beliefs deeply understood and shared by every member of an organisation. Core values guide the actions of everyone in the organisation and help shape all of its plans.

**Critical Success Factors** refer to what the organisation must get right to succeed in its mission.

**Positioning** is similar to brand. It is about building a valued and preferred position in the minds of your target audience. It is essentially about how you would like your target audience to describe you.

**Brand (Reputation)** is about developing and communicating powerful and meaningful differences between your offerings and those of your competition.

**Operation planning** is agreeing the practical plans to implement the strategy. A distinction is needed between strategy and operational planning (although the lines are sometimes blurred).

Within NGOs, governing boards tend to deal with strategy, and management deals with operations. In practise however, management often prepares draft strategies for the board to consider and approve.

A **goal** is a specific, measurable statement of what will be done to address a problem or opportunity.

An **objective** is an activity or tactic that will help you accomplish a goal.

**BUILDING A STRATEGY**

The first stage in establishing a strategy is developing a mission statement. This is followed by research and analysis; the building blocks of strategy formulation. This will assist in establishing boundaries and limits in your strategy, which is vital to maintain focus and prioritisation. You are then in a position to chart a pathway to success, and finally, implement your plan.
a) Developing a Mission Statement
The following guidance on developing a mission statement has been adapted from the HSUS web site (see ‘Further Resources’ section for the link).

A mission statement sets forth the fundamental purposes for which your organisation has been formed. It is very important to an organisation’s formation and evolution.

It should cover:
- **Purpose**: why the organisation exists, its goals and objectives?
- **Programme**: how the organisation will achieve its purpose?
- **Principles**: what the organisation’s values are.

**REMEMBER THE 3PS! PURPOSE, PROGRAMME, PRINCIPLES - HSUS**

The mission statement should be:
- **Understandable** to the general public
- **Brief**: no more than a short paragraph
- **Realistic**: in terms of your financial and human resources
- **Specific** to provide a framework for developing objectives and programmes
- **Broad** enough to stand the test of time, so it does not need to be reworked frequently
- **Accurate**: reflection of the board’s intent and understanding
- **Operational**: state the expected outcome.

Don't forget that you can't do everything for every animal. Keep your mission focused.

b) Research and Analysis
To determine the organisation's best fit within its industry (the role that will help it to achieve the most for animals), it is strongly recommended to carry out two types of analyses: an internal analysis of the organisation’s resources and its own particular strengths; and secondly, an analysis of its operating environment. A stakeholder analysis, which considers what the various interested parties feel the organisation should do, can also be useful.

An **Internal Analysis** considers the organisation’s resources, both financial and human, and its distinct competencies.

A common and simple tool for this is the **SWOT analysis**, which examines:
- **Strengths**: key strengths, core competencies/capabilities and ‘Unique Selling Points’
- **Weaknesses**: weaknesses in the organisation, things it does less well or cannot cope with
- **Opportunities**: opportunities that may arise for the organisation
- **Threats**: potential threats to the organisation and its work.

A SWOT analysis can be charted on paper or simply prepared from a brainstorming session, this is popular as it throws up many and varied ideas.

**External Analysis**: The STEEPV analysis considers the organisation's broader environment and the situations/factors that could affect its work. This includes:
- **Social**
- **Technological**
- **Economic**
- **Environmental**
- **Political**
- **(Personal) Values**.
When considering the ‘environment’, as indicated in the formula above, the following issues within the animal protection movement should be considered:

- How receptive is the government?
- How receptive are the consumers?
- What is the likelihood of success?
- Position between organisation and wider social movement
- Is the cause more important than the organisation?
- What are the industry's major problems?
- Different forms of cooperation: joint projects, coalitions and affiliations
- How full is the ‘market’ (will you be duplicating the work of others, or is there a real need)?

**Stakeholder Analysis:** The major stakeholders of an animal protection society include the board, staff, members, supporters, funders, partners, suppliers and competitors.

In animal protection organisations, the largest stakeholder group is not even represented here, probably because it cannot be consulted. It is, of course, the animals, and just because they cannot be consulted does not mean they should not be considered. In fact, they should be given priority over all stakeholders, as they are the reason for the organisation's existence. Animals can be considered by an assessment of how they are affected – numbers, severity and duration for example.

c) **Strategic Process**

As can be seen from the previous sections, there is a tremendous amount of information to gather and assimilate before you can even think about putting together a plan. However, once you know what you want to achieve and you have analysed your organisation's resources, the broader environment in which it operates and the interests of the various stakeholders involved, you are in a much better position to plan how you will achieve your mission.
The following is a model of the strategic process:

**IF AN ORGANISATION WISHES TO RETAIN ITS ‘STRATEGIC ADVANTAGE’, IT NEEDS TO KEEP ABREAST OF CHANGES TO ITS INTERNAL CAPABILITIES AND ITS EXTERNAL ENVIRONMENT, WHICH MAY NECESSITATE A CHANGE IN STRATEGY OR OTHER CORRECTIVE ACTION.**

Strategy is not a work that is set in stone as soon as it has been formulated.

**External environment:** An organisation needs to monitor emerging events and its environment and review its plans to see whether changes are appropriate. Many animal protection organisations will need to develop:
- General awareness of the broader strategic options and orientations of the sector
- Greater awareness of the plans and actions of competitors and collaborators
- Greater awareness of the political environment
- Ability to think strategically about aspects of day-to-day responsibility.

**Environmental scan** is a process for discovering and documenting facts and trends in the external environment that might impact an organisation’s future. Scanning means skimming through various sources of information, including television, newspapers and periodicals.

**Environmental scanning should include the following** (but not exclusively):
- Newspaper and news scanning for animal protection issues
- Trade journals
- Scientific press
- Trade conferences and shows
- Animal protection conferences
- Websites of key competitors
- Key animal protection meetings
- Relevant political and governmental conferences and meetings
- Funders’ conferences and meetings with funders
- Supporters’ and donors’ meetings.

When considering the position of the animal protection movement in your country, it may be helpful to bear in mind the following model, which sets out the five major stages in the growth of the movement (adapted from comments by Kim Stallwood, a long-time animal activist, author, editor and founder of The Institute for Animals and Society):
- **Acceptance building:** broad, softer education
- **Awareness and consensus building:** campaigning – harder, more focused, issue-related education, consumer awareness and lobbying
- **Legislation**
- Action to embed legislation: investigations and exposés, enforcement, legal action (test cases) etc.
- Functioning system of protection.
FURTHER RESOURCES

Websites
Amnesty International: Strategic Campaigning

Humane Society of the United States
www.hsus.org/ace/18478

Humane Society organisation and operation documents
HSUS advice on forming an animal protection society and developing a mission statement

Organisational strategy
www.family-business-experts.com/organisational-strategy.html

Books
The Art of the Long View: Planning for the Future in an Uncertain World
By: Peter Schwartz
Publisher: John Wiley and Sons Ltd
ISBN: 0471977853

Competitive Strategy: Techniques for Analysing Industries and Competitors
By: Michael E. Porter
Publisher: Free Press
ISBN: 0743260880

Exploring Corporate Strategy: Text and Cases with Business Dictionary
By: Kevan Scholes, Gerry Johnson, Richard Whittington
Publisher: FT Prentice Hall
ISBN: 0582843294

The Leader’s Change Handbook: An Essential Guide to Setting Direction and Taking Action
By: Jay A. Conger (Editor), Edward E. Lawler III (Editor), Gretchen M. Spreitzer (Editor)
Publisher: Jossey Bass Wiley
ISBN: 0787943517

Mastering Strategy (Financial Times Mastering Series)
Financial Times, Chicago, Michigan, Said, Insead Universities
Publisher: Financial Times Prentice Hall
ISBN: 0273649302

Mintzberg on Management:
Inside Our Strange World of Organisations
By: Henry Mintzberg
Publisher: John Wiley & Sons Inc
ISBN: 0029213711
The New, Completely Revised Understanding Organisations
Charles Handy
Publisher: Penguin Books
ISBN: 0141017309

The Portable MBA in Strategy
By: Liam Fahey (Editor), Robert M. Randall (Editor)
Publisher: John Wiley & Sons Inc
ISBN: 0471197084

The Rise and Fall of Strategic Planning
Henry Mintzberg
Publisher: Financial Times Prentice Hall
ISBN: 0273650378

Strategy Safari: A Guided Tour Through the Wilds of Strategic Management
Henry Mintzberg, Bruce Ahlstrand, Joseph Lampel
Publisher: Financial Times Prentice Hall
ISBN: 0273656368

The Strategy Process
James Brian Quinn, Henry Mintzberg, Joseph B. Lampel (Editor), Sumantra Ghoshal (Editor)
Publisher: Prentice Hall
ISBN: 0131227904

What Is Strategy and Does It Matter?
Richard Whittington
Publisher: Thomson Learning
ISBN: 1861523777
An important stage of project management is evaluation. Evaluation is vital if the organisation is to continuously improve its performance and avoid repeating past mistakes.
CHAPTER 14
PROJECT MANAGEMENT

1. Introduction
2. Project Management: The Basics
3. Project Planning Activities
4. The Planning Cycle
5. Estimating Time Accurately
6. Additional Considerations Relevant to Project Size
7. Evaluation
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Some animal protection societies manage enormous projects, involving large amounts of resources. Yet only a few use professional project management methods. They may also be poor at feedback and evaluation and therefore their mistakes and shortcomings can be repeated. This means they could be wasting valuable resources, most importantly their hard-won donations and their most valuable asset – their people. They could also be delaying progress towards the achievement of their mission and adding to stress and burn-out. Project management tools can help organisations avoid all of these pitfalls.

A project is any activity that has:
- A unique task
- A specified target
- A set timescale
- A fixed budget.

Every project should aim to be:
- On time
- To specification
- On budget.

Project analysis: There should be considerable analysis before the start of the project, which gives consideration to the following:
- The project manager’s role and responsibilities
- The stakeholders’ interests
- Project objectives
- Alternatives
- Risk analysis.

The project manager needs to complete the following planning activities:
- Identify clear project goals
- Define the project boundaries, referred to as ‘scoping’, what is included and what is not included in the project
- Recruit and build the team
- Agree how team members will work together
- Assess the work in broad terms
- Assign accountability and decide who will do what
- Assess risks and develop contingencies
- Assess potential implications for other departments and stakeholders and consult and involve them
- Assess project resources
- Develop a fundraising strategy with fundraising professionals, if possible
- Develop a project schedule
- Break the project down into manageable parts; sub-projects
- Agree the project budget
• Develop and write up a final project plan.

A brief overview of some of the main project planning activities follows. This is intended to give a general idea of some of the various activities involved, but should be viewed as a starting point.

**Identify clear project goals:** It is vital to identify clear project goals, ensuring that these provide maximum possible progress towards priority issue goals, as agreed in the organisational strategy.

Formulate your goals so that they are achievement-orientated, and not activity-orientated. For example, you could aim to recruit a certain number of campaigners; this would be an achievement-orientated goal. The goal would be activity-orientated if you aimed to set up a certain number of stalls to recruit new campaigners.

**Defining the project scope:** A ‘scoping’ statement does several things:
- It defines the project’s place in a larger context
- It describes the major activities of the project
- It puts some boundaries on the project to define what the project will and will not do.

The project scoping statement contains the definition and detailed description of what will be produced by the project and the desired outcomes. It specifies the name and purpose of the project, the project manager’s name and a statement of support and approval from the sponsor, if applicable.

**Defining the project scope involves:**
- Defining what is expected from the project and the criteria that will be used to evaluate results. This is very important as it sets out a template against which progress can be measured. Evaluation is very important for a number of reasons: it provides an opportunity to learn from past mistakes, it extracts useful feedback which can be conveyed to funders, members and supporters, and it identifies areas that can be improved upon
- Explaining how the project will contribute to the overall goals, as set out in the organisational strategy
- Clearly defining the methods, tasks, basic conditions, project objectives and final outcome(s)
- Defining the project boundaries; what is included and not included in the project
- Identifying all the stakeholders, persons or groups of people who are participating in the project, are interested in the project performance, or are constrained by the project
- Establishing the overall direction, expectations and constraints that the team will use when they plan the project.

**Recruit and build the team:** Make sure you have the right people on the team and that they have all the training, development and support they need for the task.

Also ensure that all key stakeholders have some type of representation, to advise the team.

**Allocation of responsibilities and accountability:** Write out the allocation of responsibilities, including areas of budget responsibility and budgetary approval limits. A key feature of being accountable is being able to show that any money given was used for its intended purpose. To do this, an organisation must keep accurate and up-to-date records.

**Assessing risk:** Explore what might go wrong, then identify countermeasures to prevent problems from occurring and designate a team member who will be responsible for each countermeasure.

**Resource planning:** Identify the resources the project requires: personnel, money, equipment, materials, time, facilities etc. Optimise scheduling with respect to all available and procurable resources.
Developing a project schedule: Identify project phases, milestones and outcome schedules. Then schedule all the works that must be accomplished to meet the project key dates and objectives. Communicate the dates by which major accomplishments in the project will be completed to the project’s sponsor, to the trustees, supporters, donors and other stakeholders.

Developing the project budget: Identify and calculate the prospective costs of project outcomes. Develop a spending budget, which includes the projected cost of the project.

Writing the project plan: Compile the information gathered in the course of the planning stage into a formal project plan and obtain formal approval from the project sponsor. Agree and document the procedures that will be used to make changes to the plan.

The project plan should include:
- Project goals
- Activities
- Allocation of responsibility with regard to budget and timeline
- Other departments involved
- Risk analysis and contingency planning
- Measurable project targets, and who is responsible for each target
- Progress reporting arrangements.

The Planning Cycle

It is best to think of planning as a cycle, not a straight-line process.

Once you have devised a plan you should evaluate whether it is likely to succeed. This evaluation may be based on a number of factors, including cost and likelihood of success and impact. This analysis may show that your plan may cause unwanted consequences, may cost too much, or may simply not work.

In this case you should cycle back to an earlier stage. Alternatively you may have to abandon the plan altogether; the outcome of the planning process may be that it is best to do nothing!

Finally, you should feed back what you have learned from one plan into the next.

The Planning Cycle

[Diagram of the planning cycle showing stages: Analysis of Opportunities, Identify aim, Explore options, Selection of best option, Detailed planning, Plan evaluation, Plan implementation, Closure of plan, Feedback, and the cycle continuing back to Analysis of Opportunities.]

The Planning Cycle

4
THE PLANNING CYCLE

chapter 14 contents
ESTIMATING TIME ACCURATELY

Gantt Charts and Critical Path Analyses help you to plan all tasks that must be completed as part of a project. They act as the basis both for preparation of a schedule and of resource planning. During management of a project, they allow you to monitor achievement of project goals. They also help you to see where remedial action needs to be taken to get a project back on course.

Gantt Charts can be used to estimate time for small and medium sized projects, and Critical Path Analysis and PERT are generally used for large, complex projects.

**Gantt Charts:** A Gantt Chart is a time-line chart, which plots project activities against a calendar. Durations for each task are shown graphically on a time scale ranging from hours to a year. Views can be provided of tasks, resources, or resource usage by task, for example:

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
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<tbody>
<tr>
<td>Task A</td>
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<td>Task B</td>
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<td>Task D</td>
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Gantt Charts:
- Help you to plan out the tasks that need to be completed
- Give you a basis for scheduling when these tasks will be carried out
- Allow you to plan the allocation of resources needed to complete the project
- Help you to manage the dependencies between tasks.

Typically, Gantt Charts indicate the exact duration of specific tasks, but they can also include:
- Relationship between tasks
- Planned and actual completion dates
- Cost of each task
- Person(s) responsible for each task
- Project milestones.

When a project is underway, Gantt Charts are useful for monitoring progress. You can immediately see what should have been achieved at a point in time and can therefore take remedial action to bring the project back on course. This can be essential for the successful and profitable implementation of the project.

**Critical Path Analysis and Programme Evaluation and Review Technique (PERT)** are powerful tools that help you to schedule and manage complex projects. They were developed in the 1950s to control large defence projects and have been used routinely since then.

The benefit of using Critical Path Analysis techniques over Gantt Charts is that Critical Path Analysis identifies tasks that must be completed on time for the whole project to be completed on time, and also identifies which tasks can be delayed for a while if resources need to be reallocated to catch up on missed tasks.
The disadvantage of Critical Path Analysis is that the relation of tasks to time is not as immediately obvious in complex projects as it is in Gantt Charts. This can make them more difficult to understand for someone who is not familiar with the technique.

A further benefit of Critical Path Analysis is that it helps you to identify the minimum length of time needed to complete a project. Where you need to run an accelerated project, it helps you to identify which project steps you should accelerate to complete the project within the available time. This helps you to minimise cost while still achieving your objective.

The Critical Path represents the sequence of tasks or events that directly affect the completion of a project. Knowing the Critical Path allows the project manager to shorten or at least control a project's schedule by focusing on those tasks that directly affect the project's completion.

Critical Path Analysis is an effective and powerful method of assessing:
- What tasks must be carried out
- Where parallel activity can be performed
- The shortest time in which you can complete a project
- Resources needed to execute a project
- The sequence of activities, scheduling and timings involved
- Task priorities
- The most efficient way of shortening time on urgent projects.

As with Gantt Charts, project managers in practise tend to use software tools like Microsoft Project to create Critical Path Analysis charts. Not only do these make them easier to draw, they also make modification of plans easier and provide facilities for monitoring progress against plans.

PERT (Programme Evaluation and Review Technique) is a variation on Critical Path Analysis that takes a slightly more sceptical view of time estimates made for each project stage. To use it, estimate the shortest possible time each activity will take, the most likely length of time and the longest time that might be taken, if the activity takes longer than expected.

**ADDITIONAL CONSIDERATIONS RELEVANT TO PROJECT SIZE**

**Large-scale projects**: If a large-scale project is considered, it can be useful to carry out a smaller scale version, a pilot project, in order to test the project and methodology. This enables an assessment of value to be carried out, before launching into a major project that will involve a significant time and resource commitment. It will also:
- Allow operational problems to be anticipated and solved at an early stage
- Provide a positive practical example to bring funders and other stakeholders on board.

**Simple projects** are often best managed using simple timetables and action plans. These should be prepared and negotiated with project staff. These should contain sufficient control points to monitor project progress and take any appropriate remedial action.

Planning should aim to make the task easier, not to build unnecessary workloads. The simplest method for the task is often the best option.
An important stage of project management is evaluation. This cannot be done unless SMART targets (particularly measurable and timed targets) are agreed in advance. Evaluation is vital if the organisation is to continuously improve its performance and avoid repeating past mistakes. On no account should evaluation be viewed as a 'witch hunt', to apportion blame for project problems. It should be viewed as an important organisational tool to help learning and organisational development, maximising effectiveness (and therefore mission fulfilment).

There are many reasons why projects fail, including:
- Poor planning
- Time scales too ambitious
- Insufficient risk analysis
- Poor budgetary control
- No change/delay notices
- Lack of procedures
- Lack of effective monitoring and control
- Project manager was not empowered
- Team responsibilities were not clear

FURTHER RESOURCES

Websites
Create a Gantt Chart in Excel

Gantt Chart and Timeline Centre
www.smartdraw.com/resources/centres/gantt/

Mind Tools – Project Planning
www.mindtools.com/pages/main/newMN_PPM.htm

Project Management Institute
www.pmi.org/info/default.asp

Books
The Definitive Guide to Project Management: The Fast Track to Getting the Job Done on Time and on Budget
Sebastian Nokes
Publisher: Financial Times Prentice Hall
ISBN: 0273663976

Project Management, 3rd Ed.
Harvey Maylor
Publisher: FT Prentice Hall
ISBN: 0273655418
Project Management
Mike Field, Laurie Keller
Publisher: Thomson Learning
ISBN: 1861522746

Project Management for Dummies
Stanley Portney
Publisher: John Wiley and Sons Inc
ISBN: 076455283X
Having a successful fundraising strategy allows you to plan for the future and will ensure that your organisation can expand its activities and work towards its objectives.
CHAPTER 15
FUNDRAISING

1. Introduction
2. Fundraisers
3. Fundraising Basics
4. Fundraising Methods
   a) Trusts and Grants
   b) Individual Supporters
   c) Major Donors
   d) Events
5. Making a Case for Support
6. Questions & Answers
7. Further Resources
Almost all animal protection organisations need to raise money to enable them to do their work. Large organisations have whole teams of fundraisers, with people specialising in a particular area of fundraising. In smaller organisations one volunteer may be responsible for all fundraising activities and may have to combine fundraising with other duties.

In many countries of the world, charity fundraising is a new concept, and some people are uncomfortable with the idea of asking people for money. However, if you are doing good work, then you deserve to raise the money to do it. Fundraising is not begging, it is an exchange; people will pay societies to do work that they believe in, but cannot do themselves.

Having a successful fundraising strategy allows you to plan for the future and will ensure that your organisation can expand its activities and work towards its objectives. However fundraising demands a large time commitment. To fundraise successfully you need to ensure you have the people and the time to do it well.

Fundraising is a skill, and fundraisers need a variety of personal qualities to be able to raise money from a wide range of people and organisations:

**Commitment:** a fundraiser should be clear about the organisation’s aims and objectives. If you do not believe in what you are doing, you won’t raise money. Fundraisers must be passionate about what they wish to do, and that passion will be infectious. Supporters most often give to a cause because of the people carrying the message.

**Confidence:** fundraisers must enjoy working with and talking with people, they must have excellent communication skills and be persuasive. They must also have the ability to motivate colleagues and volunteers.

**Organised:** fundraisers need to have excellent organisational skills and be flexible and adaptable to new opportunities.

**Analytical:** fundraisers must be able to analyse every part of their work and assess what strategies are and are not working.

**Resilient:** fundraisers will face a lot of rejection when appealing for money and it is vital that they stay positive in stressful situations and work well under pressure.

**TIP: BE PASSIONATE ABOUT YOUR WORK.**

There is a saying in fundraising that ‘people give to people’. We give to other individuals who show passion and energy and commitment, which in turn inspires us and connects us to their work. If you communicate your genuine belief in your organisation then others will pick up on it. It then becomes part of the work of a fundraiser to stay inspired. Visit some of the animals you are helping or remind yourself of your successes before you pick up the phone or write a letter.
**Raise friends before you raise funds**
Fundraising is not only about money, it is also an opportunity to communicate and establish relationships with people who share the same values. Once you have friends and advocates, cash will come in.

Nurture relationships with supporters so they will be committed to the organisation's results. It gives both parties a shared sense of a future in which small individual actions can make a difference in improving animals' lives and ultimately improving the communities we live in.

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**TIP: ENJOY YOURSELF.**
**REMEMBER IT’S ALL ABOUT FINDING LIKE-MINDED PEOPLE WHO THINK WHAT YOU ARE DOING IS GREAT. THIS PROCESS OF ENGAGING WITH OTHERS AND INSPIRING THEM ABOUT YOUR WORK, CAN ACTUALLY BE GREAT FOR YOU. IT CAN BOOST YOUR CONFIDENCE AND GIVE YOU A RENEWED SENSE OF ALL THE CHANGE THAT IS POSSIBLE IN YOUR COMMUNITY OR COUNTRY.**

**Involvement**
Most organisations raise far more money when their supporters are involved in the actual work. Invite donors to participate in some upcoming events, or ask them to write to their congressmen or women or come to your shelter and take dogs for a walk. Creating a greater sense of ownership in local development initiatives will help sustain these initiatives over the long-term.

Volunteers make the best fundraisers; they know the organisation firsthand, they are able to share personal experiences, they believe in the cause, they are enthusiastic and have the organisation's best interest at heart, they lend credibility to an organisation, they are more likely to bring friends to the organisation and they come at little or no expense. Furthermore supporters give because they are usually impressed by a volunteer’s selfless dedication.

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**TIP: DON’T FORGET TO ASK FOR HELP.**
**SO YOU HAVE FOUND SOMEONE WHO LIKES YOUR WORK, YOU HAVE INSPIRED THEM WITH YOUR CONVERSATION OR YOUR LETTER – SO DON’T FORGET TO ASK FOR HELP! YOU NEED TO SAY, AS DIRECTLY AS YOU CAN, “YOU CAN HELP US IF YOU GIVE US XXX…” HOW STRONGLY YOU SHOULD ASK WILL PARTLY DEPEND ON CULTURAL DIFFERENCES. YOU WILL BE BEST PLACED TO KNOW WHAT WILL FEEL APPROPRIATELY FORCEFUL WITHOUT BEING TOO AGGRESSIVE.**

**Gain trust**
It is important to be transparent and accountable in all your dealings with donors. Lack of trust is a major reason for not giving funds to an organisation. Organisations will not be forgiven for keeping less than adequate bookkeeping. Supporters can be very perceptive and will be more inclined to give for results than out of pity, so written appeals must be clear and concise. Successful fundraising is wholly dependent on your organisation fulfilling its mission with authority, effectiveness and efficiency. When fundraising, always watch overhead costs to ensure most of the money goes to helping the animals.

Always tell the truth. If a fundraising activity fails, admit it, learn from it and move on. Generally animal protection societies are decent, hardworking organisations, inspired by a dream, surviving on a shoestring and, by the law of averages, will make mistakes. Right the wrong and move on.
There are a variety of fundraising methods, and there is no right answer as to which methods will work best for any given country, culture or situation. Every effective fundraiser has a ritual ‘test it and see’ policy. So each time a fundraising method is used, it is tried, analysed and then amended, repeated or rejected, depending on the results. This is done on a regular basis to adapt to market forces and changes.

In general, it is best not to rely on a single source, or even just a couple of sources, of income. Legacies, trusts and grants are not regular and reliable forms of income. Legacies are, by nature, sporadic. Trusts and grants usually only offer project-by-project funding. Funding from donors and supporters is core income, and time and effort should be placed into this source, always remembering to spread the risk by developing other methods at the same time.

### a) Trusts and Grants

Foundation grants can be profitable in the short term. They are useful when a society is getting started, but then they should become a lower priority. Institutions generally only give funds for short term projects; rarely can you count on grants for ongoing core funding and overheads.

Focus on funding institutions where your supporters have or can build contacts. Let everyone know which institutions support you. Groups that have already received grants impress other funding institutions.

Little investment is needed when applying for grants. They require minimal cash and it doesn’t take long to write a proposal to a funding agency; expect one to twenty hours per proposal for research and writing. However be aware that most grant applications are rejected as there are just too many animal causes, special interest groups and animal welfare organisations battling for grant support from local and international foundations.

Grants are increasingly vulnerable to changing political climates, the priorities of donor countries and competition. Most funders refuse to fund the same groups year after year so you will be constantly searching for new institutions. In addition, grant funding does not build your organisation’s supporters and they reduce your independence to pursue programmes as you see fit. Therefore long term reliance on grants is not desirable, nor sustainable.

### b) Individual Supporters

People care and will give if asked. One of the most important challenges for an organisation is to find people who share the same values and give them opportunities to help. Individual donors have great potential, indeed there is strength in numbers. By reaching out to the general public, you can increase awareness of your issue, increase political legitimacy and participate in social development.

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**TIP: IT’S ALL ABOUT COMMUNICATION.**

**PRACTISE TALKING TO PEOPLE. COULD YOU EXPLAIN IN THREE MINUTES WHY YOUR WORK MATTERS? CAN YOU WRITE A FRIENDLY, WARM AND FACTUAL LETTER THAT COMMUNICATES THE SAME IDEAS AND FEELINGS? FOR ANY WRITTEN MATERIAL YOU CREATE, GET FRIENDS OR COLLEAGUES TO READ IT THROUGH AND ASK HOW IT MAKES THEM FEEL. IT SHOULD FEEL INSPIRING, MOVING AND CONVINCING, NOT HECTORIZED, ACCUSATORY OR MUDDLED.**
When most organisations start, they need to raise more money and expand their supporter base. Older members of the community may have more funds to give, but remember to also target younger audiences so they can grow with your organisation.

**TIP: BE CLEAR ABOUT WHAT YOU NEED. IF SOMEONE ASKED YOU TODAY HOW THEY COULD HELP, WOULD YOU HAVE A CLEAR LIST OF THINGS YOU NEED MONEY FOR? WOULD YOU BE ABLE TO POINT TO A FEW THINGS THAT DIDN'T COST MUCH AND OTHER THINGS THAT COST MORE?**

Contact potential supporters with a simple message so people will understand and support your cause. Every appeal should include an educational message; a supporter will become loyal if they feel they are part of the cause and more importantly, the solution. That can only happen if you educate them. Most people are also likely to respond when they react emotionally to an appeal; when they can understand the suffering of individual animals and that by giving funds for a specific purpose they can help take away that suffering.

One particularly effective method is to give indications of what specific amounts of money can buy, for example:
- $25 can buy feed for a hungry horse for a month
- $100 can buy a horse a new bridle to stop painful mouth sores
- $200 can rescue a horse and find it a new home.

It is important to realise that an individual donor relationship may start with one dollar, but it may turn into a sizable contribution in ten to fifteen years. Increase one individual donation by asking again, but be flexible in asking for a donation, don't always ask for money. The 'ask' could be a request for services, volunteer work or just buying a raffle ticket. Building a relationship with individual supporters is essential for the act of giving to be continuous. A supporter can be asked as many times as possible for as long as the supporter is assured that the donation is well spent. However, once an organisation has a certain number of supporters, it can then decide whether it would be appropriate to introduce regular membership fees. This prevents the organisation from having to keep asking supporters for funds.

Whenever support is given, it must always be acknowledged and then followed up so that the supporter knows how the money has been used. If the supporter is not told how their funds have been used, they will not become committed to the society. Informing supporters of how their money is being used is also important as it ensures that they are not only contacted when an organisation needs money, otherwise they may begin to feel more like your bank than your friend.

The supporter base can be increased by mass mailing potential supporters or past supporters. Mass marketing techniques are the most reliable forms of repeat gifts, however most societies lose about 20% of their supporters every year, so new supporters must constantly be added.

Direct marketing can be expensive to start up, so involve volunteers wherever possible to personalise letters to friends, handle receipts and write thank you letters. Supporters can also be contacted by telephone; reply rates can be five times better than by mail, and average donations two or three times higher.

**TIP: BE CLEAR ABOUT WHAT DIFFERENCE YOUR WORK IS MAKING. PEOPLE USUALLY GIVE TO CHARITIES BECAUSE THEY WANT THE WORLD TO BE A BETTER PLACE IN SOME WAY. HOW WILL WHAT YOU ARE DOING MAKE THE WORLD A BETTER PLACE? CAN YOU ARTICULATE THAT TO OTHER PEOPLE?**
c) Major Donors

By establishing a relationship with individuals and cultivating that relationship to build understanding and commitment to the society’s missions, there is a potential, though not easy or short term, for major donors. Potential major donors are those supporters who know all about an organisation and are probably already regular donors, have strong values and resources and view giving as an investment.

Visit your most generous supporters first, and if possible only ask for a major gift by personal contact, not by phone or mail. If you have done your research correctly you should expect that about 60% of prospective major donors give. Don’t expect very large gifts initially, but most big donors will give again and give more if you have treated them well. Some may pledge larger amounts over a few years. It is important that you identify their needs, allow them to set the pace of their relationship with your organisation, and allow them freedom of choice of when and how they want to give. Be aware that if someone has made their largest gift, they may not be able to give again.

The risk associated with targeting potential major donors is that it may annoy your most generous supporters. This risk can be reduced by good research and tailoring your request to the wants of the potential major donor. There is little cash investment required in targeting major donors; fancy printed material is not essential. But you will need time to identify prospects, to research prospects, to learn how to ask, and to provide progress reports and final evaluations.

Concentrate on upgrading current supporters who know the work you do very well and could give large amounts. Old friends may surprise you with generous gifts if they are asked properly.

d) Events

Fundraising events can raise a large sum of money in a short period of time. They can be held once an organisation has a good base of volunteers and friends. Events are a good idea to attract new supporters who would not otherwise give and to get more donations from current supporters. However they are not a good idea if they just take donations that would have been given anyway through another, cheaper method.

When events bring in new supporters, there must be a system in place to follow up and get them to give again. Without concentrated effort most events generate little awareness; to ensure they do generate awareness, events need to be well planned and must involve the right people.

The results of events vary; profits can be slim or net thousands depending on the way the event was organised. An organisation can lose a lot if it commits to big expenses and few people come to the event. Beware of bad weather and other events at the same time. Events take a lot of time and are very labour intensive; many hours of volunteer and staff time are needed. Very careful budgeting is therefore needed to ensure that you don’t lose money.

An event can be the highlight of a campaign, something that is done year after year, or it can be used as a reward for major donors. Good events can be repeated again and again for ten years or more. Many of the same donors will come each year, if invited. Repeat the same events, correcting past mistakes each time. Don’t abandon a productive event because you are bored. The donors are just getting used to it.

Although the main purpose of the event is to raise money, with effort, your guests can walk away, looking forward to returning the next time. Giving guests an enjoyable experience at an event takes a lot of hard work. The trick is to make the final results run like a seamless, timed production.
Although we may come from different cultures and faith backgrounds, and live in societies with different attitudes to charity and animal welfare, human nature is pretty much the same the world over. We all need to be persuaded to give our hard-earned money to another person or organisation. This is true for multinational corporations, governments or an elderly person who may give you a few pennies of their savings.

All these groups require, and indeed deserve, a well argued ‘case for support’; this is a statement that covers all the things they will need to know before deciding to give to a project. This checklist should be covered in any request for money, whether an official application form, a marketing letter or indeed a conversation at your charity’s open day. Get to know the principles in this checklist and get someone else to look over any letter (not the person who has prepared it), funding application or speech to ensure all the points are covered.

A case of support should touch upon the following:

**Who you are and what you are doing**

So who is your organisation? How long has it been in existence? Who runs it? Are you honest and reliable people? Why do you exist? What is your purpose? Are you trying to change the world, or just the town where you live? Make sure your organisation sounds solid, clear about its aims, trustworthy and respectable.

Also show people you will be a pleasure to work with! People want to enjoy the charities they support and the people they deal with there. So if it is appropriate, show you have a sense of humour and are kind and polite. Show that if people get involved you won’t lecture them with your personal views about animal welfare, or expose them to images or stories of animal suffering that might be distressing to them. A lot of people who care about animals will not want to be exposed to the detail of how bad things can be for animals.

**The specific objectives and programmes of the project for which you are asking**

So what exactly are you going to do if you get the funds you need? Build a shelter, treat animals, raise awareness, educate children in schools or campaign? You must show that you have thought this through, that this is a well-planned piece of work that makes good sense. How exactly will you do all this? Have you got to hire new staff or buy a vehicle? And what is your timetable?

**Why the appeal is important and urgent**

Why is it essential that you do this work and do it now? Why can’t you wait a few years? This is very
important because the majority of people who don't give do want to help but they just put off giving because they think they'll do it another time. You must make them feel they have to help NOW, that this is the moment to act if they want the world to change for the better.

And why is it important? How will the world be a better place if you do this work? How many animals will be helped? How much suffering will be eased or prevented? Inspire people with your vision of the benefits of this work. This part of your appeal should uplift the spirit and make the donor feel very happy that they could be part of something so positive and life enhancing. Positive and happy images of animals free from suffering, especially ones you have helped already, will often help you with this.

**What will happen if this appeal for support fails**
Show what might happen if the money is not raised. Paint a grim picture of the problem not getting solved or tackled, the suffering perhaps getting worse or maybe losing a critical opportunity to make a difference. You are not trying to frighten or upset your potential donor, but you do need them to understand that turning away from this opportunity to help might have consequences.

**How much money you are trying to raise**
You must know very specifically how much money you need and for what. It helps if you can provide a budget that lists all your costs, which also helps to show your honesty and how the money will be spent on the work. Also indicate how much you would like this particular person or organisation to contribute.

**Over what period of time you are attempting to raise the money**
Given a specific timescale, people will sense the urgency more clearly. For example, do you need a specific amount of money in three weeks’ time to purchase something? A timetable will also show people you have planned this properly.

**Who else is contributing**
People like to contribute to something that others also think is worthwhile. Mention other admired or respected donors in your community who have given (but ask their permission first), or tell people how many other individuals have offered their help.

**Relate to donors**
Show how a donor’s potential gift will be a reflection of what they care about. Show that you know who they are and what aspect of this work matters to them. If necessary, tell them what part of the project they are paying for. For example they can pay for the vaccines, or for a day’s work by a vet. If they particularly care about cats, see if you can give them a part of the project that will help cats.

**Be concise, coherent, urgent and motivating**
The challenge is to do all of this in a concise and straightforward way, so people can easily read and understand your important message and will be motivated to help you.

**TIP: SAY THANK YOU AS MUCH AS YOU CAN. WHEN PEOPLE ARE GENEROUS YOU SHOULD BE VERY APPRECIATIVE. MAKE THEM FEEL REALLY GOOD ABOUT THEIR DECISION, BOTH WHEN THEY GIVE AND LATER ON AS WELL. AFTER THE WORK THEY FUNDED IS COMPLETED, WRITE THEM A LETTER AND EXPLAIN THE DIFFERENCE THEY MADE. THEY WILL BE FAR MORE LIKELY TO HELP AGAIN.**
Q What is restricted funding?

A This is funding that is earmarked for a specific purpose only. Usually foundation grants are restricted – the money given by a foundation can only be spent on the work outlined in the grant application. Most organisations avoid raising donations for ‘restricted funds’, whenever they can. This is because all their work needs to be funded, and accounting for restrictive funds is often a logistical nightmare. Most organisations avoid this by wording their appeals to supporters in a way that indicates that donations are used for both the given purpose and, for example, their ‘other work to save animals around the world’.

Q What is meant by ‘mission drift’?

A Mission drift refers to a move away from the aims and objectives of an organisation in order to chase possible funding sources. This could occur, for example, when a charitable trust refuses an application, but suggests that it would provide funding for a different project. Mission drift can be avoided by charting a steady course towards the aim, with longer term planning, and then setting a fundraising strategy to achieve this course. However, offers from trusts and grant-making bodies should not be rejected out-of-hand, as they may suggest other equally, or more, effective projects.

Q Charitable fundraising is new in my country and very difficult. Should we start by copying approaches used in other countries?

A Fundraising opportunities vary greatly from country-to-country and culture-to-culture. The ‘test it and see’ policy is recommended, as outlined above. But before this, deep thought and analysis will need to be given to what is likely to succeed in your country, based on current circumstances and culture, in order not to waste time and money on methods that may not work in your region. It may also be worthwhile studying what other better-established national NGOs are doing in your country in the fundraising field.

Q We have been offered funding from a pet food company. Should we accept this?

A It is difficult to answer this question in isolation. It is recommended that an organisation establish an ethical fundraising policy, so that the Board can consider different funding options, and decide what is ethically acceptable to your organisation and what is not. This may partly depend on your area of activities and your policies.

In this specific example, there are two main considerations: firstly, does the company test on animals? Secondly, how closely is the company connected to the pet trade (promotion of pedigree animals, breeding etc.), and do they promote responsible pet ownership?
FURTHER RESOURCES

Websites
Centre on Philanthropy and Civil Society
www.philanthropy.org/

Charities Aid Foundation (UK)
www.cafonline.org

The Chronicle of Philanthropy
http://philanthropy.com/

The Council of Europe: references to publications, articles and sources of funding
www.coe.int/T/E/Cultural_Co-operation/Youth/5._Information_services/Resources_by_topic/FUNDING.asp

Directory of Funding Sources (for environmental NGOs in central and eastern Europe)
www.rec.org/REC/Databases/Funders/Default.html

The Effect of Change, an article by Jim Henry for BOND, about the changing fundraising landscape
www.globalpolicy.org/ngos/fund/2003/0606effect.htm

European Foundation Centre
www.efc.be/

The Foundation Centre
www.fdncenter.org/

Fundraising strategies and realities
www.gdrc.org/ngo/funding/cafe-strategies.html

Global Policy Forum: Funding for NGOs
www.globalpolicy.org/ngos/role/fundindx.htm

Groundspring’s Online Fundraising Handbook
www.groundspring.org/learningcenter/handbook.cfm

HSUS: Fundraising and Public Relations
www.hsus.org/ace/16122

Humane Link: Grants
http://humanelink.wiew.org/educ/hegrants.html

The Institute of Fundraising
www.institute-of-fundraising.org.uk/

NGO fundraising strategies
www.gdrc.org/ngo/funding/fund-raising.html

Resource Alliance
www.resource-alliance.org
Southern African Institute of Fundraising
www.geocities.com/Athens/Delphi/4594/

List of grant giving bodies:
www.lib.msu.edu/harris23/grants/2animal.htm

Books
Boards That Love Fundraising: A How-to Guide for Your Board
Robert M. Zimmerman, Ann W. Lehman
Publisher: Jossey-Bass
ISBN: B000222F0Y

The Complete Fundraising Handbook
Sam Clarke, Nina Botting (Editor), Michael Norton (Editor)
Publisher: Directory of Social Change
ISBN: 1900360845

Corporate Fundraising
Valerie Morton (Editor)
Publisher: Directory of Social Change/Charities Aid Foundation
ISBN: 1903991005

CPR for Nonprofits: Creative Strategies for Successful Fundraising, Marketing, Communications and Management
Alvin Reiss
Publisher: Jossey Bass Wiley
ISBN: 0787952419

Cultivating Diversity in Fundraising
Janice Gow Petty
Publisher: John Wiley & Sons, Inc.
ISBN: B000066BRQ

Do’s and Don’ts of Fundraising: How to Be a Successful Fund-Raiser
Adrienne Johnson, Joseph Johnson, Suzanne Mayo-Theus
Publisher: Leathers Publishing
ISBN: 1585972630

Effective Fundraising: An Informal Guide
Luke FitzHerbert
Publisher: Directory of Social Change
ISBN: 1903991404

Event Planning: The Ultimate Guide to Successful Meetings, Corporate Events, Fundraising Galas, Conferences, Conventions, Incentives and Other Special Events
Judy Allen
Publisher: John Wiley & Sons, Inc.
ISBN: 0471644129
Fundraising for Dummies
John Mutz
Publisher: John Wiley & Sons Inc
ISBN: 0764552201

Fundraising in Diverse Cultural and Giving Environments
Robert E. Fogal (Editor)
Publisher: Jossey Bass Wiley
ISBN: 078796512X

Fundraising on the Internet:
M. Warwick
Publisher: Jossey Bass Wiley
ISBN: 0787960454

How to Write Successful Fundraising Letters
M. Warwick
Publisher: Jossey Bass Wiley
ISBN: 078795652X

The Law of Fundraising
Bruce R. Hopkins
Publisher: John Wiley & Sons, Inc.
ISBN: 0471206121

Marketing Strategy: For Effective Fundraising
Peter Maple
Publisher: Directory of Social Change/Charities Aid Foundation
ISBN: 1903991382

A Practitioner’s Guide to Charity Fundraising
Elizabeth Cairns
Publisher: Tolley Publishing
ISBN: 0754520269

Relationship Fundraising: A Donor-based Approach to the Business of Raising Money
Ken Burnett
Publisher: Jossey Bass Wiley
ISBN: 0787960896

Revolution in the Mailbox: Your Guide to Successful Direct Mail Fundraising
Mal Warwick
Publisher: Jossey-Bass
ISBN: B0001QNKBE

Teach Yourself: Fundraising
Jenny Barlow
Publisher: Hodder Arnold H&S
ISBN: 0340857838
Ten Steps to Fundraising Success: Choosing the Right Strategy for Your Organisation
Mal Warwick, Stephen Hitchcock
Publisher: Jossey Bass Wiley
ISBN: 0787956740

Tried and Tested Ideas: For Local Fundraising Events
Sarah Passingham
Publisher: Directory of Social Change
ISBN: 1903991374

The Worldwide Fundraisers Handbook
Michael Norton
Publisher: Directory of Social Change
ISBN: 190399134X
Support services are the practical, operational areas of an organisation, including information technology, financial management and office management.
CHAPTER 16
SUPPORT SERVICES

CONTENTS

1. Introduction

2. Information Technology (IT)

3. Financial Management
   a) Keeping Records
   b) Internal Controls
   c) Budgeting
   d) Financial Reporting
   e) Outsourcing

4. Office Management

5. Further Resources
Support services are the practical, operational areas of an organisation, including information technology, financial management and office management. These areas form the organisational structure of a society, enabling it to carry its main work. Despite this, these areas are sometimes pushed aside as the main project work of an organisation takes precedence. However, the work of the entire organisation can be frustrated if they are not given due attention. This chapter highlights the importance and function of support services and offers practical advice to maximise their effectiveness.

Managers of animal protection societies may have problems in managing support service departments due to a tendency to concentrate more on programme areas, or because they have little or no expertise in these areas. This can be remedied with training, commitment and application. It can also be minimised by appointing dedicated, skilled staff in these areas, or if this is not possible, by ‘outsourcing’ (contracting out) these areas.

There is a real need to involve relevant support staff in strategy and planning. The practical reason for this is that both strategy and planning are strongly influenced by financial and technological factors. Very often programme staff members make plans, only to find out later that the organisation’s support services cannot cope with the demands being made of them. Involving support staff in the planning process is also important as it helps motivate them and to make them feel part of the organisation’s mission.

IT connects you to the world. It is a vital part of networking, keeping up-to-date and well-informed and maintaining contact with national and international collaborators. In addition, an efficient and modern IT system can:

- Assist with an exciting web presence for educational, campaigning, lobbying, service delivery (such as a re-homing centre) and fundraising purposes. A website is an organisation’s calling card and its importance should not be underestimated
- Help build awareness with the use of newsgroups and electronic bulletins
- Permit e-mail mailing list for mass communication with selected groups
- Enable files, images, artwork and videos to be shared
- Automate many previously manual processes, freeing up valuable staff time
- Deal with accounts and fundraising data in an integrated software system
- Permit automatic lobbying using specially designed software
- Run shelter management operations, using purpose built software systems.

A reliable and modern IT service is critical to the future success of all animal protection societies. Increasingly funders are recognising its importance and are giving more funds to update or purchase modern IT systems. Having a modern IT system is indeed central to the continued development and expansion of a society.
Good financial management involves:
  a) Keeping records
  b) Internal control
  c) Budgeting
  d) Financial reporting

a) Keeping Records
The foundations of all accounting are the basic records that detail an organisation’s earnings and spending. This includes the contracts and letters for money received and the receipts and the invoices for the things it buys.

These basic records prove that each and every transaction has taken place. They are the cornerstones of being accountable. Every society must make sure that all these records are carefully filed and kept safe.

It is also a good idea to keep a written record of each transaction. Make a list in a separate book, referred to in this section as ‘cashbook’, of how much your society has spent, on what and when.

Keeping accurate records is of vital importance. If an organisation cannot prove that it has used a donation for the purpose it was given, then it will be difficult to obtain more funding. Being accountable is fundamental.

b) Internal Controls
Every organisation should ensure that it has the proper controls in place so that money cannot be misused.

Controls always have to be adapted to different organisations. However, some controls that are often used include:

• Keeping cash in a safe place, ideally in a bank account
• Making sure that all expenditure is properly authorised
• Following the budget
• Monitoring how much money has been spent on what every month
• Employing qualified finance staff
• Having an audit every year
• Carrying out a ‘bank reconciliation’ every month. This means checking that the amount of cash in the bank is the same as the amount that is in the cashbook.

c) Budgeting
Good financial management calls for the preparation of accurate budgets, in order to determine how much money will be needed to carry out a project, campaign, lobby etc.

To prepare a good budget, a society must first identify exactly what it hopes to do and how it will do it. After listing the activities, it should then plan how much the activities will cost and how much income they will generate.

Make sure to include everything in the budget, including salaries, equipment and supplies.

d) Financial Reporting
The final element of good financial management involves writing and reviewing financial reports.
A financial report summarises an organisation's income and expenditure over a certain period of time.

Financial reports are created by adding together similar transactions. For instance, this might mean adding together all the money spent on fuel, new tyres and vehicle insurance and calling them 'Transport Costs'.

e) Outsourcing
If you are unable to find one person who is capable of performing all of the above mentioned financial management functions, it may be worth outsourcing.

There are many advantages to outsourcing:
- It leaves the organisation free to concentrate on achieving its mission
- Contract companies are specialists in their field, and can be consulted and trusted to deliver what the organisation, as a customer, wants
- It overcomes problems related to recruiting and managing staff in specialist roles.

However these disadvantages should also be borne in mind:
- Loss of control and flexibility with managing support services
- It could be more costly in the longer term, costs can rise once customers rely on a company
- Difficulty of knowing whether you are being overcharged for services offered.

Some of these risks can be minimised by:
- Preparing a good contract with the company, using legal advice to ensure that any concerns are covered, and that the agreement can be terminated if you are not content with what is being delivered
- Requesting regular reports/updates, in order to monitor the service being delivered
- Regularly reviewing the situation, including competitors' costs, and immediately taking up any problems with the contractor in order to resolve these or finish the agreement.

Regardless of the size of an office, it is essential that the working space is safe and that it provides the people working there with what they need to carry out their jobs. The aim should be to have a functional and practical working space.

It is important that one individual is made responsible for the office management. If nobody is given the responsibility, then important things may go undone. It is also counter-productive for programme staff to be diverted into support functions; this is quite simply not where their talents and motivations lie. An individual with responsibility for discharging office management duties in an efficient and cost-saving manner will be able to take pride in achieving these aims, and thereby help the organisation to achieve its mission in the way he/she is best able.

The creation of an 'Office Manual' of procedures is an excellent discipline. This not only helps all staff, including new recruits and volunteers, to familiarise themselves with routine procedures, but it also provides an excellent opportunity for management to review their office procedures to ensure that all support services are effective.
FURTHER RESOURCES

Websites
Association for Progressive Communications – Financial Management for NGOs
www.apc.org/english/capacity/business/index.shtml

Excellence in Financial Management
www.exinfm.com/board/messages/9/77.html?SundayMarch520001129am

Internet Use: NGOs in Action
www.gdrc.org/ngo/internet-ngos.html

Management Accounting for NGOs
www.mango.org.uk/
www.mango.org.uk/training/courseoutlines.asp

Non-profit and NGO Finance
www.exinfm.com/nonprofit.html

NGOs and Digital Media – Survey Report
www.nmk.co.uk/article/2004/01/14/ngo

NGO Electronic Directory
www.etown.edu/vl/ngos.html

NGO Networking
www.gdrc.org/ngo/ngo-networking.html

NGO Management Courses Worldwide
www.gdrc.org/ngo/ngo-curriculum.html

Books
Charity Bookkeeping and Financial Management: A Step-by-Step Guide for Finance Workers and Treasurers in Charities and Voluntary Organisations
Sam Karuhanga
Publisher: Oak Park Consultancy
ISBN: 0953858103

Delivering IT Strategies
Leslie Willcocks, Nancy Olson, Peter Petherbridge
Publisher: Butterworth-Heinemann
ISBN: 075064821X

Financial Management for Charities and Not for Profit Organisations
Keith Manley
Publisher: ICSA Publishing Ltd (Institute of Chartered Secretaries & Administrators)
ISBN: 1872860524
Financial Management for Development: Accounting and Finance for the Non-specialist in Development Organisations (INTRAC NGO Management & Policy S.)
John Cammack
Publisher: INTRAC
ISBN: 1897748523

IT Strategies for Business
Joseph Peppard
Publisher: FT Prentice Hall
ISBN: 0273600249

A Practical Guide to Financial Management: For Charities and Voluntary Organisations
Kate Sayers
Publisher: Directory of Social Change
ISBN: 1873860846
A library is a necessity, rather than a luxury. To be useful, it needs to include relevant and up-to-date resource materials.
CHAPTER 17
LIBRARY

1. Introduction

2. Information Sources
   a) Books and In-house Information
   b) Video Library
   c) Photo Library

3. Archives

4. Categorisation
Accurate and relevant information is vital if the movement is to lose this negative image. In fact, many organisations now have comprehensive and efficient libraries and archives, and some larger societies even employ a professional librarian to safeguard information.

A library is a necessity, rather than a luxury. To be useful, it needs to include relevant and up-to-date resource materials.

A professional organisation will strive to keep relevant information sources in an easily accessible way, through books, reports, photographs, videos or simply supporting paperwork.

a) Books and In-house Information

There are some extremely useful and interesting books about animal protection, many of which have been referenced in other chapters of this manual. They should be kept in a library, available for staff’s interest and future reference.

TIP: MANY PUBLISHERS WILL GIVE OUT FREE COPIES OF BOOKS FOR REVIEW PURPOSES. IF YOUR ORGANISATION HAS A MAGAZINE, ONE WAY TO OBTAIN NEW BOOKS FREE OF CHARGE IS TO ASK FOR A REVIEW COPY AND WRITE A REVIEW FOR YOUR MAGAZINE.

Visiting national, academic or veterinary libraries is a good way of locating relevant books. Amazon (www.amazon.com) is also a good starting point.

Although much research is now carried out on the internet, there is still a real need for in-house information. Many organisations are continuously scanning their operating environment, keeping abreast of their issues, political developments, the moves of opponents and the work of other animal protection organisations. These information sources can remain useful if filed in an accessible way.

For organisations that have a permanent library or information system, the difficulty may be in rationalising the range of information kept. It is very tempting to make this as comprehensive as possible, but this may be counter-productive as it may make it difficult to find relevant information amongst the mass of irrelevant information. It is also necessary to review information regularly and throw out unused or out-of-date materials.

Another difficulty is ensuring that staff members are made aware of relevant information, but are not bombarded with masses of information about every issue. Useful ways of dealing with this include digests (brief summaries of key information and details of where to obtain the full information) and targeted distribution lists (i.e. distribution lists for each major issue, as opposed to general lists).

Finally, all libraries and archives need a system of lending out materials, to ensure that these are traceable and returned, as well as a reference system to assist the librarian and users.
**b) Video Library**

Videos can be kept in a library, in addition to books. Some organisations also take their own footage. If footage is needed for media work, then a supply of broadcast quality videos (betacams or mini DVs) will need to be maintained.

When videos are lent to the media, they should be accompanied by written instructions detailing the lending conditions, including how copyright acknowledgement should be given. Some organisations have the relevant copyright burned through their broadcast quality videos, to ensure that this cannot be omitted.

**c) Photo Library**

Many organisations also keep a photo library for media and publications. Most are kept on computer these days, with hard copy photos being scanned and added. Photo libraries in particular need to be well categorised, please see the section on ‘Categorisation’ for more information.

It is also good practice to make photo CDs, copies of which can be easily sent out in response to requests. There could be a general one, plus various subject or campaign photo CDs for individual investigations, companies, farming systems etc.

It is also possible to include a Press Centre on the organisation’s website, where photos can be accessed and downloaded.

Copyright conditions also need to be given when photos are sent or accessed.

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**ARCHIVES**

Important **work-related information** such as relevant strategies, operating plans, time-lines, contacts etc. should also be referenced and kept in archives. Good planning and logical record keeping are essential.

Archives need to be readily accessible. A logical system of cataloguing files can help with this. Another important aspect is the physical arrangement of the archives; space is needed to make these accessible. The most frequently used information in the archives needs to be in physical proximity to the office, once off-site stores are used for archives, busy staff members tend not to use them again!

Archives need to be regularly reviewed and unused information thrown away. However, certain information needs to be kept for a minimum period by law, for example, certain tax and accounts information and charity documentation.

Historic information, such as the founding charter and/or first meeting of the organisation, should always be kept.

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**CATEGORISATION**

Categorisation is a process of looking at all the information sources that one has and then finding a logical method of grouping the information. This is a practical exercise and, once done, can prove to be extremely useful in saving time looking for materials.
Which categories to use will depend on each organisation’s work and information needs. For example, a society that works solely on companion animal issues, may find it useful to divide its resource materials by activities; shelter management, re-homing, vet techniques, educational programmes, campaigning etc. A second main category could be organisational issues; financial management, strategy, planning, fundraising etc. Work-related information should also be categorised and archived, including office manual, operating procedures, minutes of board meetings, health and safety issues etc.

The main idea is to tailor the categories for your own particular needs, making the materials readily accessible and easy to find.
Magazines and newsletters have often been the focal rallying call for social change movements.
CHAPTER 18
PUBLICATIONS

1. Introduction
2. Types of Publications
3. Audience
4. Production
   a) Schedule
   b) Template and Style
   c) Content
   d) Images
5. Some Cost Considerations
6. Further Resources
Magazines and newsletters have often been the focal rallying call for social change movements. They are central to the advancement of a movement; mobilising supporters around key actions and developing an understanding of both the movement’s key issues and the work of the individual organisation.

At a practical level, a magazine or newsletter also has to be cost effective and be of use as a fundraising and supporter development tool.

Writing a society magazine or newsletter is not a simple task. These publications have to ‘talk to’ different audiences and put across different messages. An accessible standard style is needed, notwithstanding what could be a variety of contributors with widely different agendas and approaches. This requires careful planning, strong style guidance and firm editorial management.

Before embarking on a publication, the following questions should be answered:
1. Who do you want the publication to reach?
2. How many pages will it have?
3. How often will it be produced?
4. How will it get to the audience?
5. What style/tone will it have?
6. What size will it be?

The following sections will assist you in answering these questions.

Magazines and newsletters are the organisation’s ‘shop windows’ to the world, together with the website. This means that they need to appear professional and interesting, to involve and attract support to your cause.

In general, a magazine is a more substantial publication, whereas a newsletter is a less formal and less substantial method of updating audiences about the organisation’s work or progress, including news on individual issues or campaigns. Leaflets are prepared for a specific purpose, such as a given campaign or to introduce the organisation.

A magazine is usually published periodically for example twice-yearly or quarterly, whereas newsletters can be published more frequently, whenever there is news to report. Magazines and newsletters are a regular and general means of communication.

Whether an organisation uses magazines, newsletters or both will depend on a number of factors, including available finances. Similarly, the frequency of magazines and newsletters will depend on money and time available. Larger organisations tend to have regular magazines (quarterly or six-monthly) plus newsletters such as campaign updates or supporter newsletters. However, some smaller organisations with less funding often use newsletters instead of magazines to meet many of the same purposes, at a lower cost.
A society needs to know who its audience is, to ensure that it is reaching and ‘speaking to’ its audience in an appropriate way. Often, supporters and potential supporters are the main audience. However, a magazine or newsletter could also be used to reach other audiences, including:
- Politicians
- Corporate companies
- The media
- Other animal protection societies
- Opponents.

Due to the potentially wide range of people reading the publication, it is important that the publication is authoritative, accurate and highlights the issues as well as the current work of the society.

Questionnaires are a good way to get to know your audience. They can help you find out which aspects of your magazine are most popular with subscribers. Over time, the format and content of your magazine can be amended to make it more popular to your majority audience(s).

Questionnaires can also reveal interesting and unexpected facts; for instance, that readers want to know how they can help on particular issues. Therefore opportunities to donate, or protest, or how to buy cruelty free products should be included.

Organising the society’s magazine is a big job and should not be underestimated. The routine administration is sometimes delegated, but an experienced editor or editorial panel usually organises the overall plan and edits articles carefully. This section aims to give an overview of some of the factors that need to be considered at the production stage.

a) Schedule
A schedule has to be agreed with the printer and designer, to ensure that the magazine can be sent out at the planned time. A timetable needs to be drawn up which details when various tasks will need to be completed, to ensure that the magazine is produced by a specific date. It is usually best to work back from the due date. If you are producing your publications in-house it is still best to set a schedule and to keep to it.

Key stages in the process include:
- Brainstorming ideas for content
- Drafting content and sourcing pictures
- Editing submitted content and pictures
- Design layout of content and pictures
- Final editing
- Proofreading
- Printing.

b) Template and Style
A template for the contents of the magazine is a good way to maintain control over the length and format. It is easier to manage a magazine that has a coherent plan, and it usually results in a better quality publication.
It is also preferable to have style rules for a magazine, to ensure a coherent and recognisable style and branding.

c) Content

Examples of typical parts of a magazine include:
- Regular letters page
- Regular reviews
- Regular events calendar
- Editorial
- News pages
- Features pages.

Example of a contents list for a 20-page magazine:
1. Four pages of news. Each page to contain an ‘in brief’ column of four snippet stories and have one large news story and picture
2. A two page project-orientated feature
3. A one-page ‘day in the life’ article, written in the first person, which could relate to the feature
4. A two-page fundraising-orientated feature and a spread with a ‘viewpoint’ and ‘animal fact file’
5. In the centre of the magazine, a two-page feature on the priority campaign/issue
6. A one-page celebrity interview, in a different tone and style. This would be on the same spread as a one-page ‘profile’ type piece and could be about an individual, an organisation or a country
7. The reader would then turn to a page on ‘animal friendly’ living and book reviews before going on to an events calendar and letters page
8. The back cover contains details of how to contact the organisation.

An important part of the preparation for the magazine is collecting and recording information on an ongoing basis. It is easy to keep a ‘magazine box’, in which to put copies of all interesting information or developments. This will save an enormous amount of time when the magazine is due and help to ensure a rich content.

d) Images

Choosing the right images for articles is an important part of the magazine preparation. Often images can have a greater impact than words. However, many supporters will complain if there are too many gruesome and horrifying images in one edition. Supporters can feel manipulated, if only gruesome images are shown.

Action pictures that show the organisation’s work are very important. If supporters can see that ‘their’ organisation is actively tackling the problems, they feel more secure and appreciate that their support is worthwhile.

5 SOME COST CONSIDERATIONS

It is always difficult to judge how much money an organisation should spend on its magazine. This cannot be measured solely by the size of donations that come in from an accompanying appeal. As stated earlier, the magazine is the main ‘shop window’ to the organisation, and it helps to build supporter loyalty and understanding. Some of the value of a magazine will be in less tangible forms, such as changing attitudes and lifestyles, whereas some will be concrete: longer term values, such as generating future legacies.

Advertising: Many organisations decide to include paid advertising in order to make their magazines less costly. This can certainly help financially, but it should not be undertaken lightly.
Firstly, advertising should always be ethical (if possible connected to the organisation’s remit – cruelty free goods or ethical investments for example) – even some pet food companies test on animals. Secondly, the balance of the magazine has to be maintained. It is first and foremost the society’s magazine; it is the organisation’s own ‘shop window’ and as such, it should feature issues relevant to its mission. It is completely counter-productive to allow it to be overtaken by advertising, becoming more like a marketing catalogue.

**Printing costs:** The number of copies printed has an effect on cost. Publications may be destined for a small circulation because they are only of interest to a minority of people. The difficulty lies in finding a way to cater for that demand at an affordable price.

For example, to print 500 copies in the UK of a 48-page report might cost in the region of £1,350; a thousand copies would cost £1,590. Most of the cost of printing – the administration, filmsetting, plate-making and setting-up – is ‘fixed’. It remains the same, regardless of how many copies are produced.

But printing costs need not be prohibitive. Costs can be brought down by a variety of means, including photocopying, digital colour printing and publishing on the internet.

**Photocopying** on a machine in good condition can produce very satisfactory results, and a simple way to achieve even better quality is to improve the weight and texture of the paper. Remember that it may be a better use of your resources to have attractive pages cheaply printed than mediocre pages expensively printed.

If you have an A3 photocopier you could print the pages yourself in the correct imposition, using laser proofs as originals. In this case, you would only need to have a ‘proper’ cover printed (perhaps in one colour) and the booklet stapled (‘saddle-stitched’).

**Digital colour printing:** For a more ambitious document you could consider using one of the new digital colour technologies. Digital colour printing is a four-colour process similar to full-colour litho. One advantage of digital printing, even at less economic quantities, is the rapid turnaround: 48 hours or less.

**Publishing on the internet:** An even more radical way to escape the trap of fixed printing costs is to eliminate print altogether by publishing your documents on the internet. You could still have them designed to a high standard, but your designer would convert them to ‘Portable Document Format’ (PDF). Anyone who wanted to read a paper copy could print it out on his or her own printer, anywhere in the world, in exactly the same designed format.

However, it may be difficult to extract any revenue from this, so the overall profit and loss situation could be unfavourable. Also your readers would have to get a free copy of Acrobat Reader if they don’t already have it from the Adobe website. You would also have to monitor the use of this facility very carefully to make sure you were succeeding in getting your message across.
Magazines
The following are some good examples of successful animal protection society magazines. It is well worth obtaining copies to study the format and content.

All Animals
The Humane Society of the United States (HSUS)
Tel: +1 (202) 452 1100
E-mail: membership@hsus.org
Website: www.hsus.org/press_and_publications/humane_society_magazines_and_newsletters/all_animals/
HSUS’s quarterly membership magazine – in full colour and informative – co-produced by HSUS and Time, Inc.

Animals International
WSPA
Tel: +44 (20) 7587 5000
E-mail: wspa@wspa.org.uk
Website: www.wspa.org.uk/index.php?page=911
WSPA’s bi-annual magazine

AWI Quarterly
Animal Welfare Institute, USA
Tel: +1 (202) 337 2332
E-mail: awi@awionline.org
Website: www.awionline.org/pubs/quarterly.html
AWI’s quarterly magazine – full of very useful information

Campaign Report
The British Union for the Abolition of Vivisection (BUAV)
Tel: +44 (0) 207 700 4888
E-mail: info@buav.org
The BUAV’s quarterly magazine – well thought-out sections and good design