

# RISE

Results in Independent Schools E-newsletter  
Shining a Light on Fundraising

Alexander Haas  
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

**First Things First**



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[www.fundraisingcounsel.com](http://www.fundraisingcounsel.com)



from the home-office desk of  
**Sandra K. Kidd** | Senior Partner

## Why It's Good to Talk About Planned Giving in the Pandemic

Recently, a long-time community fundraising volunteer asked me if it was okay to talk about planned giving in the midst of the COVID-19 crisis. My answer? It is not only okay; it is a good thing to do.

In fact, fundraisers across the country are reporting an increased level of donor interest in planned giving this year, and many organizations are hearing from donors that they are making or revising their intentions to make charitable bequests. Some of the reasons are financially-driven; a stronger stock market has helped portfolios rebound and changes in the way we work may spur decisions about where to live or when to retire.

But what motivates gift planning is not only about economics, it is deeply personal as well. On one level, this is not surprising since the pandemic has touched so many lives. We have also had much time with our own thoughts since mid-March to reflect on what we value most.

In the spring, we advised our non-profit partners to call their donors, volunteers, and alumni—simply to see how they were doing, and to let them know how the institution was coping. We have heard that these calls, made from home, have allowed fundraisers to connect in meaningful ways with their donors, learning more about their families and where the donors are in their own lives. And our professionals have had the chance to talk about their lives, as donors ask about their children, inquire about the health of parents, and are charmed by a child popping onto the video screen or a pet making a cameo appearance. The result is a new level of personal connections that, nurtured, will grow.

Often, fundraisers feel that they need formal training in order to talk about planned giving with donors. I have long advocated that anyone can start a conversation about planned giving, because planned giving is, at its core, simply about a person's

values.

Leaving a legacy through charitable giving is a powerful and enduring way to support the mission of organizations that matter most to us. So, yes, pick up the phone, set up the video call, or sit six feet apart—and have the talk about planned giving with your donors. It's always the right time to give someone the opportunity to act on what they believe and what they value.

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Be realistic with your  
year-end appeal goal.  
It may be difficult to predict  
how donors will respond at  
the end of this unusual year.  
Set your goal with  
realistic expectations.

**DAVID KING**

*A*lexander·Haas



## We Think You Should Know

### **Giving Was Up 7.5% in the First Half of 2020**

According to a new survey, charitable giving in the first half of 2020 increased by almost 7.5% over the first half of 2019. That marks a big shift from the first quarter of this year, when giving was 6% behind the same period in 2019. The second quarter also marked a five-year high in the number of donors and contributions.

- Donors who gave less than \$250 were a major driver of growth, increasing 19.2% over the first six months of last year.

- The number of midlevel donors, who made gifts of \$250 to \$999, and major donors, who made gifts of \$1,000 or more, increased year-over-year by 8.1% and 6.4%, respectively.
- The overall number of donors increased by 7.2% over 2019, with new donors increasing by 12.6%.
- Donor retention increased 1.8% overall. Despite a sharp decline in the number of new 2019 donors retained in 2020, the number of repeat donors retained or recaptured from previous years increased sharply in the second quarter.

The results are from the *Fundraising Effectiveness Project*, which is managed by the **Association of Fundraising Professionals** in collaboration with **GivingTuesday** and analyzes donation data from the *Growth in Giving Database*. COP, 10-6

### Battle for Aid to Private School Students Lost

A controversial rule backed by U.S. Education Secretary Betsy DeVos, and meant to reroute millions of dollars in coronavirus aid to K-12 private school students, was shut down, at least temporarily, by a federal judge that determined the department had not only "acted beyond its authority" but misinterpreted the will of Congress. The CARES Act, passed in March, set aside more than \$13 billion in federal aid to help schools cover their budget-crushing pandemic costs.

Plaintiffs in the lawsuit, led by the NAACP, argued that the money was meant to be distributed to public school districts based on how many low-income students they serve. For private schools, lawmakers required districts to set aside a small portion of that money to pay for "equitable services" such as tutoring or transportation, though only for those schools' low-income students.

DeVos and her Education Department read the law differently, arguing throughout the summer that private schools should receive help based on how many students they serve overall, rather than just their share of low-income students.

According to one analysis by the Learning Policy Institute, the department's reading of the CARES Act would have increased private schools' share of CARES Act dollars from \$127 million to \$1.5 billion. The department first issued its controversial interpretation of the law in late April in the form of guidance. While that guidance was nonbinding, the interim final rule announced in June was enforceable by law. NPR, 9-11

It starts with an email.....

and ends with 30 minutes of  
fundraising counsel\*

[info@fundraisingcounsel.com](mailto:info@fundraisingcounsel.com)

\*free time

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**Now That's Interesting**

## The Billionaire Who's Now Broke...And Couldn't Be Happier

On September 14, 2020, **Chuck Feeney** completed his four-decade mission and signed the documents to shutter the **Atlantic Philanthropies**. The ceremony, which happened over Zoom, included video messages from Bill Gates and former California Gov. Jerry Brown. He had finally given away all his money to charity.

Over the last four decades, Feeney has donated more than \$8 billion to charities through his foundation. It is estimated that he only set aside about \$2 million for his and his wife's retirement. In other words, he's given away 375,000% more money than his current net worth. And he gave it away anonymously, and went to great lengths to keep his gifts secret.

While remaining under the radar, he was nonetheless a great influence on other philanthropists. When talking to *Forbes* about Feeney, Bill Gates said, "He's been a huge influence on how Warren [Buffett] and I think about philanthropy."

"I see little reason to delay giving when so much good can be achieved through supporting worthwhile causes. Besides, it's a lot more fun to give while you live than give while you're dead," he said.

Read the article [here](#). *Forbes*, 9-15

## Single Women Reduced Giving Early in Pandemic

Single women were more likely than single men or couples to decrease their giving during the first two months of the Covid-19 pandemic. Nearly 40 percent of those women said they had done so because they were uncertain how the public health crisis would affect the economy — and by extension, their finances.

Only about 30% of single men and 32% of couples decreased their giving for that reason.

A new report, conducted in mid-May, tracks with other recent studies that show women have been disproportionately affected by the pandemic and its negative effects on the economy. That is in contrast with the Great Recession, which had a bigger impact on men.

The study cited other reasons single women reduced their giving:

- A third did so because they were uncertain about the further spread of Covid-19, compared with 24% of single men.
- Nearly 32% did so due to reduced income because of social distancing and business shutdowns, compared with 23.4% of single men.
- More than 30% did so because of "reduced interaction with community," compared to 24% of single men.
- More than half of the people surveyed — 56% — said they engaged in some kind of charitable activity during the first couple of months of the Covid-19 pandemic.

Read the report [here](#).

## We'd Like You To Know

### Transforming Institutions

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For more than 30 years, Alexander Haas has been a fixture in the nonprofit community. We are honored to have worked with some of the largest, and some of the smallest, independent schools that help transform our nations adolescents into our next leaders.

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