



First Things First



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from the organized desk of
Nancy E. Peterman | Partner

Keep Endowment Donors in the Know

A vice president for advancement who read something our firm wrote several years ago on conducting an endowment compliance audit contacted us recently. She mentioned this is a present concern for her organization because it had not been a priority of those who preceded her.

Unfortunately, throughout the years, there have been numerous public cases where donors or their heirs believed that the terms of an established endowment were not carefully followed. Most notably is the case at Princeton University involving the A&P grocery chain heirs, and their very public case against the University.

Search the term "endowment misuse" and links to a number of articles will appear. It is wise to carefully monitor endowment funds, not only for investment growth, which is often the primary concern of boards or investment committees, but also to ensure the intent of the donor is at the forefront.

For organizations with a low threshold for endowment creation, over the years, the number of funds grows much faster than the staff monitoring the use of funds. Automation helps with labeling and categorization of line item expenditures, but human oversight from time to time is invaluable.

Providing good stewardship for endowments requires advance work.

[Here are several steps to keep in mind:](#)

**The How & Why of Data & Digital Giving
with Quinetha Frasier**

Giving has changed. Many of us have phone in hand most of the day and spend hours in front of our computers. **Quinetha Frasier** joins the podcast to share how **MyPledger** is making the switch to digital giving easier, for both organizations and donors, and why tracking the success of campaigns through data is essential.



Catch a new episode of Futures in Fundraising each month on Tuesdays at 10:00 am (EST) on Facebook Live.

To download this show and catch up on others, find us on iTunes.

[Listen up this is good stuff....](#)



Client Partner Shout Out....

When a Gift to Someone Becomes a Gift to Someone Else

As a gift for her wife's 60th birthday, actress **Portia de Rossi** has established the **Ellen DeGeneres Wildlife Fund**, a foundation that will support a variety of causes near and dear to Ellen's heart. The initial gift from the foundation was made to the **Dian Fossey Gorilla Fund International** to support its Karisoke research center project and its campus in Rwanda. The gift was announced on Ellen's national syndicated television talk show.

The President and CEO of Dian Fossey Gorilla Fund, **Tara Stoinski**, said the campus will serve as a brilliant focal point for their efforts to protect wild gorillas over the next decades.

Alexander Haas is proud to be working with the Dian Fossey Gorilla Fund and to have played a background role so that the talk show host's birthday celebration was truly memorable.



[You can watch the announcement here.](#)

We'd Like You to Know....

Transforming Institutions

Welcome Returning Client Partner



THE DIAN FOSSEY
GORILLA FUND
INTERNATIONAL

The Dian Fossey Gorilla Fund International, in Atlanta, GA, is a returning Client Partner. We will provide Campaign Counsel.

[See our comprehensive list of client partners...](#)

Our Transforming Services

Alexander Haas offers a wide range of fundraising consulting services for organizations of all sizes. Our priority is to help transform institutions that transform lives. Whether you are readying for a capital campaign or need to assess your annual fund, our services are tailored to each individual client.

[What can we help you with?](#)

Alexander Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

Piedmont Place
3520 Piedmont Road NE Suite 300
Atlanta GA 30305-1512
(404) 832-9200 info@fundraisingcounsel.com



This email was sent to: gingerchakalall@me.com

This email was sent by: Alexander Haas
Piedmont Place, 3520 Piedmont Road, N.E., Ste. 450 Atlanta, GA 30305

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