

Team

The Education Advancement Monitor

Alexander Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

First Things First



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www.fundraisingcounsel.com



from the pristine desk of
Nancy E. Peterman | Partner

Year-End Giving in a Pandemic

In normal times, most development offices function on a natural, predictable calendar-driven rhythm, with springtime solicitations, a summer slowdown, fall solicitations, special events and the traditional year-end appeal. But since March, nothing about this year has been normal. With so many of our usual fundraising tactics upended due to COVID-19, year-end giving will be more critical now than ever before.

Many of you had a plan in place already for your calendar year-end appeal. With some staff still working from home and given the unknowns of how the pandemic will continue to unfold, this year's processes will need to adjust. Colleges and universities are struggling to create a safe and effective environment—some virtual, some in-person, and many hybrid—for students that will be beneficial for all involved. At this point, institutions are simply focusing on how to hold on and make it through these challenging times as they seek to address long-term financial survival, workforce availability, and fulfill their mission to educate, and create knowledge through ongoing research.

As you contemplate your strategy for the yearend, here are a few practical tips to consider:

Be Timely. Donors will receive a larger than usual amount of solicitation mail and email this fall, especially since this is an election year. Plan for your letters and brochures to arrive in mid-October, giving you the opportunity to send a second, more focused appeal to a smaller list around Thanksgiving. Be sure to plan around the challenges of mass printing if you're not in the office. If you use a mail-house, don't forget that your vendor's schedule might be flooded with extra political mail.

Be Transparent. Your alumni and other donors understand that this is not a typical year and that your need is greater than ever. Without going too far into the weeds, tell them the story of how your institution has been impacted by the pandemic. Focus on how you've adapted to provide classes and services to students, more so

than the financials. Importantly, tell stories of how you are impacting lives. Help donors to understand how their gift will advance your university's mission, not just balance the budget.

Be Optimistic. The fundraising guru Harold J. Seymour wrote that an effective appeal must both stir the mind and warm the heart. Talk about how your university will come through this ordeal like a phoenix rising from the ashes. This pandemic will be over someday, and your institution will be stronger and more efficient having worked through it.

Be Realistic. While 2019 was a strong year for giving to educational institutions, it is difficult to predict how donors will respond at the end of this unusual year. Although there is much pressure for your year-end appeal to perform well, set your goal conservatively to manage realistic expectations.

As we look back on 2020 and the disruption to our comfortable rhythms, perhaps we'll realize that the changes we were forced into by the pandemic resulted in fresh new approaches that found their way into our new status quo – a worthy outcome from the difficulties we're living through today.

Your alumni and volunteers care deeply about your university and its success. As you undertake your important year-end fundraising, know that all of us at **Alexander Haas** wish you the best and always welcome the opportunity to help if needed.

It starts with an email.....
and ends with 30 minutes of
fundraising counsel*
info@fundraisingcounsel.com
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TODAY**

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News of Interest

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 percent of single men and 32 percent 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](#).

However, A Majority of Donors are Optimistic

A nationwide survey of the giving intentions of donors across 44 states finds overall, U.S. donors appear to be optimistic about the economic recovery in the coming months, and more than a third surveyed reported their financial situation was better than last year.

Key Findings

- Nearly two-thirds expect the economy will rebound by the end of 2020 or by the middle of 2021 at the latest. Nine percent say they don't expect the economy to recover to pre-pandemic levels for a very long time.
- Six out of 10 mid-level and major donors expected their giving to stay at the same level as last year, and that one in four respondents expected to increase their charitable gifts in the second half of 2020.
- One-in-six donors expected to give less, and fewer than one in 20 anticipated a substantial drop in their giving for the rest of the year.

More than 40% of major donors surveyed said they won't attend a big in-person gathering until there's a vaccine. About 80% of donors expressed a willingness to meet one-on-one with fundraisers, or attend a small event at their church or in someone's home, as long as social-distancing and other measures were in place. *Financial Advisor*, 8-3

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Start planning NOW!

DAVID KING

Alexander Haas



We Think You Should Know

New Survey Looks at Fundraising Activities

More than half of charitable organizations in the United States are expecting to raise less money in 2020 than they did in 2019, and an equal percentage believe the same will occur in 2021, according to the Association of Fundraising Professionals' (AFP) Coronavirus Response Survey. More than 850 fundraisers in the U.S. participated in the survey distributed to all AFP members in May.

Key Highlights

- Compared to the first quarter of 2019, 33% did not see any changes in fundraising totals, while 31% saw increases and 35% saw decreases.
- More than half of respondents—57%—expect to see decreases in giving in the second quarter. Only 25% expect an increase, while 18% believe giving to their charity will remain the same.
- 56% of respondents expect to raise fewer funds in 2020 compared to 2019, while 21% predict organizational funding will increase, and 23% believe fundraising totals will remain the same.
- Almost half of charities report increasing their fundraising activity now because of COVID-19, while 44% will keep their fundraising at normal levels throughout the year. Only 7% of organizations plan

to decrease their fundraising.

- When asked which types of fundraising they will focus on more in 2020, 82% of respondents selected activities related to donor retention and stewardship, with 78% of respondents saying they would focus on social media, online and virtual events, and 75% selecting email as a priority.
- Nearly 64% have had to cancel at least one fundraising event, and 24% have canceled three or more events. At the same time, more than 50% have switched at least one in-person event to a virtual event, with 14% converting three or more events into online experiences.
- 9 in 10 respondents indicated they are now working from home, with 45% their organization was “well prepared” for this shift and 38% believing they were “somewhat prepared.”

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