

# Team

The Education Advancement Monitor

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 transparent with your  
year-end appeal.  
Help donors understand  
how their gift will advance  
your mission,  
not just balance the budget.

**DAVID KING**

*Alexander 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*

Congratulations to our Client Partner **Maryville College**. The institution ranked #4 of top colleges and universities in the state of Tennessee by the personal finance web site *WalletHub*. Rankings are based on 30 key measurements, ranging from admission rates and diversity to student-faculty ratios and net cost to rate the state's best colleges. *Timesfreepress.com, 10-19*

The **Blank Family Foundation** donated a \$20 million legacy grant to the **University of Texas in Austin** to create *The Arthur M. Blank Center for Stuttering Education and Research*. The Center will be the largest for research and education on stuttering in the country. Arthur Blank, co-founder of The Home Depot, is a person who stutters and has previously attempted treatment to improve fluency. The 78-year-old said it's genetically been part of his family for several generations. *ABC, 10-19*

Our Client Partner, **Norfolk State University**, celebrated its 85th birthday on September 18 with a virtual founder's day address and a virtual convocation. The HBCU also announced major new research, as part of the **National Institutes of Health's Rapid Acceleration of Diagnostics (RADx)** initiative, the *RADx Underserved Populations (RADx-UP)* program. The Center will assess the use of telehealth as a tool for addressing low-income housing residents' mistrust in COVID-19 guidance and will develop community-informed strategies to address resident concerns about COVID-19 testing and to make testing more relevant to their needs. *Blackengineer.com, 10-14*

The **Bill & Melinda Gates Foundation** awarded a three-year, \$15 million investment in support of COVID-19 diagnostic testing hubs at historically black colleges and universities (HBCUs). According to the foundation, Black Americans are more than twice as likely to be infected by the virus and to die from COVID-19 than whites and are nearly three times as likely to live in an area with insufficient access to rapid testing. Initial recipients of the funds include: **Florida A&M University** (Tallahassee), **Hampton University** (VA), **Howard University** (DC), **Meharry Medical College** (Nashville), **Morehouse School of Medicine\*** (Atlanta), and **Xavier University of Louisiana** (New Orleans). *NPD, 10-14*

**West Virginia University\*** received a \$25 million gift from **Brad Smith** and his wife, **Alys**, in support of an economic development initiative and remote worker program. Through the newly named *Brad and Alys Smith Outdoor Economic Development Collaborative*, the gift will support efforts to attract talent to the state through a competitive application process, with preference given to outdoor enthusiasts or young families that can contribute to a more diverse, inclusive, and purposeful state-wide community. *PND, 10-8*

As part of a four-year, \$1 billion pledge announced in June to advance racial equality and economic opportunity, **Bank of America** has announced commitments totaling \$300 million. The commitments include support for initiatives across 91 U.S. and global markets. Initial higher education recipients include: **North Carolina A&T State University**, **Atlanta Technical College**, **Dallas College-EI Centro Campus**, and **Arizona State University-Downtown Phoenix**. *PND, 9-9*

\*Alumni Client Partner

It starts with an email.....

and ends with 30 minutes of  
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*\*free time*

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## News of Interest

### **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*** New\* & Returning Client Partners



Greenville University\*



Norfolk State University

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, institutions that help make our country a better place to live.

**[Take a look at our past and present  
Higher Education Client Partners.](#)**

### ***Our Transformational Fundraising Services***

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