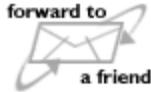


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First Things First



November 10, 2019
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from the desk of
Carl G. Hamm | Managing Partner

A Modern Day Fundraising Dilemma

Reviewing the ethical statements now required to be accepted when renewing my Certified Fund Raising Executive (CFRE) status last month, I was particularly struck by the following points in the International Statement of the Ethical Principles of Fundraising:

- *Fundraisers will always respect the free choice of all individuals to give donations or not.*
- *Fundraisers will not accept donations where the acceptance of those gifts would not be in the best interests of the organization or create a conflict of interest that would be detrimental to the organization's reputation, mission, and relationship with existing supporters and beneficiaries.*

Until recently, I wouldn't have thought about these statements representing donors' and organizations' rights necessarily being in conflict. However, considering recent high-profile cases of gifts being rejected, or being refused before they've even been offered, following these principles in certain circumstances can create quite a dilemma for the modern fundraiser.

On rare occasion, a donor's conflict of interest, such as their own personal gain, the burden of administering a particularly complicated gift, or a donor's desire to direct their gift for a use outside the organization's best interest requires invoking a review of gift acceptance policies or the consideration of a formal gift acceptance committee - the channels through which fundraisers are shielded from personally deciding whether an unusual gift should be accepted.

Yet, these days, institutions are increasingly facing external pressure to reject otherwise legitimate donations from individuals and families, not on these grounds, but based on perceived immorality on the proposed donor's part. As an example, numerous museums in the United States and England have recently been forced to respond to public pressure by rejecting current and future gifts from the Sackler

family, with protesters asserting the family's personal complicity and contribution to the opioid addiction crisis.

It is usually a straightforward decision not to accept a gift when a proposed donor has been convicted of criminal activity. But in recent cases, a donor's political views, their position on a provocative or hotly-debated topic such as climate change, or their legal ownership of a company with controversial business interests have encouraged bystanders to take a vocal, public position on the validity of the donor's giving and to criticize an organization's appropriateness in receiving it.

The essence of charitable giving in America relies on an individual's freedom to make a voluntary contribution to any organization or worthy cause they wish to support. These transactions of the soul can bring indescribable joy and fulfillment to the donor, while providing the resources necessary for an organization to maximize the delivery of its mission. Our job as fundraisers is not to question a donor's character or motive for choosing to be philanthropic; it is to facilitate their ability to give unless some real conflict exists that would substantially impede or damage the organizations we represent.

The values-based questions in play today supersede the function of a traditional gift acceptance committee. An organization's board of directors, with public input as it sees fit, should be the arbiter of whether a gift from a specific donor would be detrimental to its organization's reputation or mission or would harm its relationship with its constituents to the extent that the gift should be refused. But as boards diversify and represent more divergent points of view, debate about the receipt of controversial gifts is only likely to increase, further complicating fundraisers' ethical role in representing both donors' and institutions' interests.

In the end, I believe that the spirit of philanthropy and goodwill that has fueled America's nonprofit sector and provided immeasurable benefit to society will continue to thrive, reconciling the generosity of well-intentioned individuals and families with the organizations that are meaningful to them. And as far as I am concerned, it is a privilege to assist them both in this worthy endeavor.

October is *Ethics Awareness Month*

In the midst of the public asking questions about donor anonymity and what counts as tainted money, the **Association of Fundraising Professionals** launched **Ethics Awareness Month**, just ahead of the busy fundraising season.

"A lot of people believe we have entered a new era of philanthropy scandal," says Robbe Healey, chair of AFP's Ethics Committee. But she says the organization was founded in 1960 partly because of "concerns about ethical practice and unethical practice. It's been a driving force since the very beginning."

AFP requires members to comply with its Code of Ethical Standards, which was designed to provide concrete guidelines for nonprofit fundraising professionals. The group publishes a list on its website of fundraisers who have been sanctioned or expelled from the organization. The goal of Ethics Awareness Month is to give fundraisers the tools and skills they need to draft documents and policies, such as gift agreements, and to lead conversations with nonprofit executives and staff members to be sure everybody knows about fundraising ethics.

On October 1, a social-media campaign was launched to explain one of the 25 standards in its ethics code each business day, with the goal of demystifying the rules for fundraisers, board members, donors, and others.



"Expanding the awareness of ethics is an extension of building out the professionalism of fundraising as a career path," says Jason Lee, AFP's chief advocacy and strategy officer and general counsel. *COP*, 9-30

Movers & Shakers...

Ed Ellison was named head of school at **Cape Fear Academy*** (NC). He was most recently head of **St. Johns Country Day School** (FL). He replaces Donald Berger, CFA's head of school for seven years, who announced he would be stepping down earlier this year. *WilmingtonBiz*, 10-7

Hun School of Princeton received a \$5 million gift from Ed and Lynn Breen to fund construction costs of a new STEM center and to expand the private school's auditorium into a fully equipped performing-arts center. *COP*, 10-7

Charlotte Country Day School announced the *Forefront Campaign: Shaping Tomorrow Together*, a five-year, comprehensive capital campaign, and the largest ever for a school in the region. The Campaign aims to raise \$54 million and conclude the largest, most transformational construction project in Country Day's history by the end of the 2019-20 school year. *Charlotte Business Journal*, 10-1

Rabbi Shaye Guttenberg was named head of school of **Hebrew Academy** (RASG) in Miami Beach. Guttenberg previously served as the head of school at **South Peninsula Hebrew Day School** (CA). *Miami Sun Sentinel*, 10-1

The estate of aviation pioneer James S. McDonnell Jr. has donated \$21.5-million to the **Mary Institute and St. Louis Country Day School** (St. Louis) to build facilities for advanced study in math, science, and engineering. The gift is the largest in the history of the institution. *St. Louis Post-Dispatch*, 9-1.

The United Bank Foundation Connecticut donated \$10,000 to **Covenant Preparatory School** (Hartford), an independent day school dedicated to meeting the education needs of under-served families. *Hartford Current* 8-2

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