

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



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:](#)

About That Bumpy Ride...Don't Panic

Last month, Alexander Haas President & CEO David King wrote in this very newsletter that the new tax laws, put in place in January, would no doubt have some effect on philanthropic giving. He cautioned then that the next few months could get bumpy for fundraisers.

This month, ***The Chronicle of Philanthropy*** turned to David when reporting on new bumpy challenges for the philanthropy community....the Dow Jones decline. On February 5th, the Dow experienced its worst point drop in history. On February 8th, investors saw the second-worst point drop.

First tax rules, now the stock market...smells a lot like the Great Depression of 2008, which punched giving squarely in the gut.

from the article

*"When we see a drop in the Dow, we flash back to the fall of 2008 and think the sky is falling," says **David King, chief executive of Alexander Haas**, a fundraising consulting company in Atlanta.*

But experts say the Chicken Littles should chill - at least for now. A market crash is defined as an abrupt decline of 20 percent or more in value, as in 2008. So far, stock values have declined by no more than 10 percent compared with the year's high, far from crash territory.

"We saw organizations stop capital campaigns in 2009. But that's not where we are now," King says.

[Go here to read the article \(subscription may be required\)...](#)



A dark-themed advertisement with a background of blurred office equipment. The text is white and centered. At the top, it says "Successful Campaigns Require Planning" in a serif font, followed by "ARE YOU READY?" in a large, bold, sans-serif font. Below this is a white rounded rectangle containing the text "Take Our CAMPAIGN READINESS Assessment". At the bottom, the Alexander Haas logo is visible, featuring a stylized 'A' and the text "Alexander Haas" with the tagline "TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES" underneath.

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....](#)

We'd Like You to *Know....*

Our Transforming *Fundraising Services*

You're just a jump away from learning about all the fundraising aids Alexander Haas has in its vault of Transforming Services.

[Jump!](#)

Transforming Institutions

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.

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



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