

RISE

Results in Independent Schools E-newsletter
Shining a Light on Fundraising

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from the organized desk of
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Must Dos Before The Dog Days Are Over

The Dog Days of Summer—a saying I have heard since I was a little girl sitting on my grandmother’s front porch in sun-baked South Carolina. Their dog Red was fond of lying under that same front porch, and I always thought the Dog Days must be Red’s favorite time to do his favorite thing: nothing.

Later, I learned that the Dog Days take their name from the stars: the 40 days from July 3 to August 11 represents the period when the sun appears in the same region of sky as Sirius, the Dog Star, a part of the constellation Canis Major. Hence, the Romans called this time *diēs caniculārēs*, or “Dog Days.”



With the science lesson concluded, what can we do now that we've reached the end of the Dog Days of Summer and head into Fall? For many of us, the fiscal year has just wrapped up and it's not quite time to swing into fall giving. Volunteers and donors are coming back from vacations, and maybe we and our staffs are getting some last-minute time away as well. The slowed-down rhythms of summer can make it hard to feel productive.

So, here are a few ideas that can pair well with a cold glass of iced tea on a hot end-of-summer day. You can even kick your shoes off and no one will be the wiser.

1) Thank 10 people for their most recent gifts—in a personal way. Pick up the phone, or write an old-fashioned note, or send a personal text if that is how you connect best with the person you are thanking. Take the time to be thoughtful in your thanks. And if you find you enjoyed thanking these 10 donors, then keep going and thank 10 more.

2) Analyze 3 solicitation tools your organization used this year: What worked? What didn't? How much did it cost, both in direct costs and in staff or volunteer time? What was the return on investment? If you were starting a new fundraising program, would you use this method again?

3) Identify your top professional goal for the rest of 2021. Imagine that you are writing your year in review on New Year's Eve. What will your headline be? I am happy to be working with several clients whose capital campaigns are gaining momentum every day, and so mine will be "Campaign Success!"

More Philanthropic News

Donate Button on a Zoom Call?

Speaking of raising money through virtual events...things may have just gotten a little easier thanks to the launch of a new donate button on **Zoom**. Now, participants in Zoom meetings and events can make charitable contributions within video calls through Donations by *Pledge*, a free app created by Pledge, a fundraising technology firm. Pledge does not take a cut of donations.

Last year, an estimated 25,000 nonprofits used its virtual event tools to broadcast fundraising appeals

and a real-time ticker that lists donors on roughly 50,000 virtual events streamed on Zoom, Twitch, YouTube, Facebook Live, and Instagram Live.

Free and paying users of Zoom can activate the donate button by going to their Zoom account settings, switching on Zoom Apps, and installing the free app. They can start a campaign by selecting at least one charitable beneficiary from the more than 2 million nonprofits in Pledge's global charity database. Nonprofits that aren't in the database can work with Pledge's support team to get approved and added to the list.

[Here's more information about Zoom's new donate button.](#) *COP, 8-31*

Vanguard DAFs Total \$1.7 billion in Grants

Vanguard Charitable awarded grants totaling \$1.7 billion to more than 50,000 charities through its donor-advised funds during the fiscal year that ended on June 30, a 9% year-over-year increase in giving. The increase was fueled in part by responses to racial injustice and inequality, pandemic and natural disaster relief and recovery, and giving in support of nonprofits impacted by a contracting economy. Other significant focus areas for donors included support to education with nearly 25,000 grants. *PND, 9-5*

Schwab Charitable Awarded \$3.7B DAF in 2020

Schwab Charitable facilitated DAFs of 855,000 grants totaling \$3.7 billion in fiscal year 2021 — a 13% year-over-year increase in total funding awarded to charities. In all, Schwab Charitable account holders supported more than 113,000 charities and boosted the number of grants by 24% compared to the previous all-time highs set in fiscal year 2020. The organization also noted a 48% increase in the number of grants that were not designated for a specific purpose. Approximately 60% of contributions to Schwab Charitable in FY21 were in the form of non-cash assets, including publicly traded securities, restricted stock, and private business interests. *PND, 7-20*

We Think You Should Know

Foundation Investment Study Results for 2020

Long-term investment returns held steady and U.S. foundations generally maintained or increased their spending rates in 2020. The ninth annual study, the **2020 Council on Foundations—Commonfund Study of Investment of Endowments for Private and Community Foundations** found that U.S. foundations:

- Generally maintained or increased their spending rates, which rose to 5.6% from 5.4% for private foundations in 2020, but declined moderately to 4.7% from 4.8% among community foundations;
- Private and community foundations with assets of at least \$500 million spent at the highest rate, 6.1%; and
- 45% of community foundations reported an increase in donations received, with a median increase of 83.6%.
- Private foundations reported an average of 13.1% in short-term returns and community foundations reported an average return of 12.1% in 2020, both representing a decrease compared with 2019's returns of 17.4% and 18.2%, respectively.
- Long-term investment returns held steady, however, as private foundations reported an average ten-year return of 8.4%, up from last year's 7.8%, while community foundations reported a ten-year return of 7.6%, slightly lower than last year's 7.7%. *PND, 8-24*

Consumer Confidence 'Collapses' as Delta Variant Cases Rise

Consumer confidence is down, but the stock market continues to hum along, as Covid-19 cases rise

because of the Delta variant. That all means it could be a challenging environment for charities and fundraisers seeking support from average donor households.

Some important indicators:

The **consumer sentiment index fell** 13.4 percentage points in August to 70.3 out of a maximum 100 points, according to the University of Michigan's Surveys of Consumers. It's a big drop that exceeded only six other times in the surveys' nearly 70 year history. The early summer optimism, now dashed by the reality of yet another surge, could have "an emotional impact on spending patterns" meaning that some households will be less willing or able to make their regular donation.

Unemployment declines, but many lost jobless benefits after Labor Day. August saw a relatively large, half-percentage point decline in the unemployment rate, falling from 5.9 percent in June to 5.4 percent in July. The rate had hovered very close to 6 percent since the start of the year.

Stock-market performance is one of the leading indicators of philanthropic activity, at least at a macro level. As of the last week of August, most major stock-market indices had performed well over the previous 30 days. The Nasdaq Composite Index was up 2.8 percent, the S&P 500 was up 2.2 percent, and the Dow Industrial Index was up just 1 percent. *COP, 7-30*

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