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First Things First



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from the frozen-no-more Texas desk of
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Navigating Greener Pastures in Challenging Times

Despite the pandemic, development officers continue to leave relatively secure positions to take on new chief development roles, amidst the upheaval in the institutions they are joining. Over the past few months, several colleagues and friends have reached out for advice on how to navigate such an important life change, wanting to make sure they're as successful as possible given the increased pressure on fundraising in these unusual times.

Even in stable circumstances, accepting such an important new role can be challenging, both for the hiring CEO or director and for the development officers themselves, evidenced by the continued high turnover rate among new development directors. Several factors contribute to why new chief development officers often stay such as short time, leading both the development officers and organizations into a cycle of frustration and disappointment.

By focusing on three key ideas, both candidates and their organizations are likely to find more productive success over the long-term during these challenging times.

Common Expectations. Development professionals take new jobs for a variety of reasons – more money, additional responsibility, prestige, or sometimes just to leave an unpleasant situation. Organizations hire new development directors with great expectations, often with the idea that a new person is going to somehow boost the institution's fundraising overnight or meet unreachable goals by doing things a new way. Between the new employee's ambition and desire to do a good job without complaining and the organization's unrealistic expectations, the new staff member is often cast prematurely into a no-win situation, even before they've had time to understand the challenges and opportunities of the job. Clear and open communication about expectations from the beginning is the key to success, both for the person taking on a new position and the one hiring.

Appropriate Acclimation. To be successful, a new chief development officer must have time to understand the organization's mission, budget, culture, and development operation. This acclimation that would usually take place naturally around the water cooler or other casual interactions around the office are even more elusive in this era of working from home and meetings by Zoom. Despite the financial pressures to immediately produce, new staff should expect and be given the opportunity to get to know their new organization's nuances and opportunities and to onboard through a deliberate, thoughtful process to be successful over the long-term, without just stepping into the expectation of immediate results.

Build the Plan – Work the Plan. This may be the most important reminder for new development directors and hiring CEOs alike. Development is a disciplined, systematic process that engages an organization's current and prospective donors in providing financial support, both in the short-term and over the long haul. As such, a new development director must have the time to both develop and gain consensus on a strong strategy and plan to accomplish these goals. Effective fundraising is more than a series of ad hoc tactics – it's the establishment of a solid plan that is well executed and modified along the way. Especially in these times of heightened expectations for fundraising, this principle should continue to guide new chief development officers and their organizations, rather than a knee-jerk reaction to current circumstances.

Given the important financial challenges that have emerged over the past year, recruiting and maintaining effective chief development officers will become even more valuable for hiring organizations and those seeking greener pastures. For both, this can be an exciting time for new beginnings and the opportunity to create new fundraising strategies responsive to our post-pandemic environment. Perhaps this can be the moment we break the cycle of such rapid turnover in the development field? As always, all of us at Alexander Haas welcome the opportunity to help your organization should you find yourself in such an important time of transition.

News You Should Know

Fundraisers More Confident at Year End but Worried About 2021

In late November and early December, the *Association of Fundraising Professionals* asked its members how optimistic they were in various aspects of their fundraising and what trends and challenges they see ahead. They conducted the same survey in September. As 2020 came to a close, fundraisers were increasingly confident they would reach their year-end goals — even as many expressed uncertainty about 2021.

Key Highlights

- Fundraisers **grew in optimism** from an average of 6.52 in September to 6.98 in December (out of 10). They also became increasingly confident they would raise more money in 2020 than in 2019.
- Confidence levels that **donors would be receptive to their communications** grew from 6.75 in September to 7.38. When asked about their confidence in finding fundraising success in 2021, respondents were generally optimistic, recording an average of 6.47.
- More respondents **cited donor retention and stewardship than any other option** — an average of 60% selected it as the most important area over all three time frames — as the area they would devote increased effort over the next three, six, and 12 months.

- **More fundraisers prioritized big-gift fundraising** in the latest survey than in September. More than half of respondents selected major gifts as a priority over the next three months, 61% over the next six months, and 64% over the next year.
- **Online and email solicitations were another top priority** for fundraisers, although respondents were less likely to say they would remain so as 2021 progressed.

COP, 2-5

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Bernie Marcus and Arthur Blank, jointly donated \$40 million through their foundations to the **Gary Sinise Foundation Avalon Network**, which will establish 20 treatment sites nationwide to offer cognitive-health and mental-wellness programs to thousands of military veterans, first responders, their families, and other people in need. *COP, 2-22*

The Home Depot will contribute \$1 million in grants to support campus improvements at Historically Black Colleges and Universities through its annual *Retool Your School* program, this year doubling its commitment to fund 30 projects, providing \$20,000 to \$75,000 grants per school. *MetroAtlantaCEO, 2-19*

COR Inc., received a \$100,000 donation from the **AT&T Foundation** to support on-campus behavioral health services for **Carver STEAM Academy** students – addressing trauma and removing barriers to educational success. COR serves students (grades 9-12) who are marginalized by poverty and race-based educational inequities. *MetroAtlantaCEO, 2-18*

Arturo Jacobus will retire as president and CEO of the **Atlanta Ballet*** at the end of the 2021 performance season. He has led the ballet for 12 years. *COP, 2-12*

The **Arthur M. Blank Family Foundation** announced a \$17 million grant to the **National Center for Civil and Human Rights** in support of capital expansion and educational programming. *PND, 2-11*

The **Accreditation Council for Graduate Medical Education (ACGME)** awarded **Emory University School of Medicine, Emergency Medicine Residency and Morehouse School of Medicine** as the inaugural winners of the *ACGME Diversity and Inclusion Award*, recognizing their innovation, commitment, thought leadership to create physician workforce diversity, and efforts to promote inclusivity. *MetroAtlantaCEO, 2-10*

Kennesaw State University* received a grant from the **Georgia Power Foundation** for an initiative to increase the number of African American male teachers. The Call Me MISTER (Mentors Instructing Students Toward Effective Role Models) program will provide academic support, mentorship, tuition assistance and job placement assistance to Black male teacher candidates. *MetroAtlantaCEO, 2-9*

Clark Atlanta University received \$250,000 from **Diageo North America** to create a permanent endowment fund and provide financial aid grants to talented students across different disciplines and majors. The grant will provide \$25,000 to address the 2021-2022 academic year's immediate scholarship needs to at least 10 students each year. *MetroAtlantaCEO, 2-9*

C5 Georgia Youth Foundation, a five-year leadership development program serving under-resourced middle and high school youth, received a *2021 Chick-fil-A True Inspiration Award in the Education* category. The organization will receive a grant to further their efforts, and support C5 Georgia alumni as they progress through college. *MetroAtlantaCEO, 2-5*

Kennesaw State University* and Wellstar Health System established the *Wellstar-Tom and Betty Phillips Elite Honors Nursing Scholarship*, a new \$5 million endowment that will create an opportunity for highly qualified undergraduate students to gain acceptance into the Wellstar School of Nursing. *MetroAtlantaCEO, 2-3*

The **Frances Bunzl Family Trust** disbursed the bulk an approximately \$5.6 million gift in equal shares to **Jewish Federation of Greater Atlanta** (Federation) and **Jewish Family & Career Services** (JF&CS) Atlanta. It is the largest endowed gift in both orgaization's history. *MetroAtlantaCEO*, 2-3

The Center for Puppetry Arts* named **Sarah Dylla** as the new Museum Director. Most recently, Sarah served as the Curator for the Atlanta History Center's current exhibition about the history and impact of the 1996 Olympic and Paralympic Games, now on view at the Atlanta History Center. *MetroAtlantaCEO*, 2-1



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News You Should Know

Online Giving Exploded While Overall Giving Ticked Up Slightly

Donations to charities increased 2% in 2020, while gifts made online grew 21% over 2019, according to **Blackbaud Institute's** latest annual report on charitable giving, released Tuesday.

Donations to big organizations, those that raise \$10 million or more a year, were up 5.3% in 2020. Medium-size nonprofits, those with total annual donations of \$1 million to \$10 million, saw a 1.2% increase. But small nonprofits, those that raise less than \$1 million, saw a 7.2% decrease in contributions.

The picture was rosier for digital giving, with small groups faring far better than other nonprofits. Large organizations saw a 15% increase in online fundraising hauls in 2020 compared with the year before. Midsize nonprofits saw online fundraising increase nearly 25%. Small groups expanded their online fundraising by 22.3%.

As donors turned to digital donations, the share of total charitable revenue from online giving jumped sharply, from less than 10% in 2019 to roughly 13% in 2020. In another sign of how digital fundraising is shifting, more donors are using their smartphones to make gifts. The report estimates 28% of all contributions made online were from mobile devices.

Go [here to read the report](#).

Nonprofits Would Be Eligible for New Federal Aid Under Biden Stimulus Plan

When President Biden took the oath of office on January 20, he brought with him a new \$1.9 trillion stimulus proposal that would allow nonprofits to participate in a new loan program and draw from a \$3 billion economic development fund. The plan also contains multiple measures that might relieve the stress on nonprofits and foundations to provide aid to Americans in need.

Grants from the economic development fund could be used for “initiatives that support bottoms-up economic development and enable good-paying jobs.” The plan says that “state and local government entities, tribal institutions, institutions of higher education, and nonprofits” would be eligible to draw on the \$3 trillion fund.

The stimulus bill enacted in December provided nonprofits a one-year extension of the temporary charitable deduction available to people who don’t itemize their taxes and another round of forgivable Paycheck Protection Program loans. *COP, 1-15*

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