



Atlanta Results

Your Monthly Resource for Philanthropic News

Alexander-Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

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from the desk of
Sandra K. Kidd
Senior Partner

Where There's a Will...There's a Way

I moved into a new house last year, and as part of moving, had to do all the usual tasks of filing change of address notices, getting utility accounts established, setting up new car and homeowners insurance policies, and updating contact information. In the process of updating my important documents folders, I noticed one task that also needs my attention: reviewing my will and estate plans to make any necessary changes to align with recent changes in my life.

COVID brought about life changes for many people—some people moved or downsized, some had their children return home to live close to family, some took early retirement, others went back to work for economic reasons. We've heard from donors, large and small, that they also spent a lot of time thinking about what matters most to them, what charitable causes they support, and how those causes align with their values.

Personal values can play a major role in making estate plans that include gifts to charity, because your donors are trusting your organization to use the funds wisely and well at some future time when they won't be around to see the results firsthand. A great way to start the conversation about estate planning is to ask your donors this question: What do you value most about the work we are doing?

From there, a few different questions can follow:

- Would you be willing to consider making us part of your legacy?
- May I ask if you have us in your will or estate plans?
- Would you consider making us a beneficiary of your retirement account(s)?
- Would you consider making a gift to us this year from your IRA fund's annual required minimum distribution?
- May we recognize you as a part of our legacy giving group?

As you can see, no technical knowledge is required, only an interest in your donors and in learning what's important to them. Once you are willing to start the conversation, you will find many ways to show donors how they can support your mission and work for years to come.

The Carters Honored by the Gates Foundation

President Jimmy Carter and former First Lady Rosalynn Carter were awarded the Goalkeepers Lifetime Achievement Award from The Bill & Melinda Gates Foundation. They were honored for their extraordinary work on disease eradication, mental health, democracy, conflict resolution, human rights, and, most notably, combating neglected tropical diseases (NTDs) such as Guinea worm disease, river blindness, and malaria. The award was accepted on their behalf by Paige Alexander, CEO of **The Carter Center**, and Jason Carter, chair of The Carter Center Board of Trustees.

The Bill & Melinda Gates Foundation announced this year's Goalkeepers Global Goals Award winners, recognizing the contributions of six remarkable leaders working in their communities and around the world to advance progress towards the United Nations Sustainable Development Goals during the UN General Assembly.

Alexander Haas was honored to have provided fundraising counsel to **The Carter Center**.

Our LinkedIn

Nonprofits Showed Adaptability During COVID Pandemic

An *Independent Sector* report finds that government-nonprofit partnerships, adaptable leadership, and proactive planning played a crucial role in nonprofit organizations' adaptability during the COVID-19 pandemic.

Based on three national surveys conducted between April 2020 and April 2023, the new report found that while many negative impacts—such as event cancellations and lower staff retention—have lessened over the past three years, organizations have benefited from some changes made during the pandemic, including:

- 42% of nonprofits were still offering online programs as of April 2023.
- 60% of nonprofits continued to engage in a strategic planning process.
- 42% continued advocacy efforts.
- 36% introduced new programs delivered either entirely in person or through hybrid models.
- 42% created new donor recruitment programs.

The report also found that while overall funding reductions decreased in 2023, the percentage of organizations facing challenges with corporate sponsors (13% in April 2020, 27% in December 2020, and 24% in April 2023) and major donors (9%, 24%, and 16%, respectively), as well as drops in donations (33%, 50%, and 36%), remained relatively high. Meanwhile, the share of respondents indicating increased demand for services grew, from 22% in 2020 to 36% in 2020 to 46% in 2023.

[A Shock to the Status Quo: Characteristics of Nonprofits That Make Strategic Decisions During a Crisis \(PDF\)](#), can be found [here](#).

Big Donors Give Bigger

Rich donors gave an average of \$34,917 to charity last year, a 19% increase from pre-pandemic levels and 13.5 times more than the average amount given to charity by the general population. And 85% of high-net-worth households gave to charity in 2022. While that is just a 3% drop from 2020, it is about 35 percentage points more than the share of nonwealthy households that gave last year.

The 2023 *Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* surveyed those who have a net worth of at least \$1 million, was produced by the Indiana University Lilly Family School of Philanthropy at IUPUI in partnership with Bank of America, and found that wealthy women continue to be an important force in charitable giving. Women make 85% of charitable-giving decisions in affluent households, the study found. In addition, 42% of women respondents said they volunteered at a charity last year, compared with 33% of men respondents. While more rich women volunteer than rich men, only 16% of those women served on a nonprofit board, compared with 30% of men. [More here.](#) *COP, 10-3*

\$9.2 billion Spent Annually on Climate Change

A report from the Indiana University Lilly Family School of Philanthropy, focused in part or entirely on the environment or climate change, estimates that nonprofits spend between \$7.8 billion and \$9.2 billion annually on programs and activities that address climate change. Of that spending, an estimated 49% went to climate mitigation efforts—those focused on limiting greenhouse gas emissions to stop global warming—and 14% went to adaptation, which is focused on limiting the negative effects caused by a changing climate, with 34% not clearly specified.

According to the survey, the most common tactics employed by nonprofits to support their work was policy-based approaches (30%), followed by climate justice and just transition of climate action (21%). When organized by sector focus, greener energy use and green and resilient energy supply topped the list of total climate expenditure (35% and 34%, respectively), followed by green and resilient land use (23%). *PND, 9-27*

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\$124M to HBCU Transformation Project

The **HBCU Transformation Project**, a collaborative effort to drive tangible, long-term progress across historically Black colleges and universities (HBCUs) and boost the Black economy, was awarded \$124 million from Blue Meridian Partners.

The latest investment, which boosts Blue Meridian's total investment in the effort to \$184 million, will expand the Transformation Project's work to drive systemic improvements among HBCUs nationwide. The HBCU Transformation Project is a collaboration between UNCF* (United Negro College Fund), Thurgood Marshall College Fund (TMCf), and Partnership for Education Advancement (Ed Advancement). Forty HBCUs are currently working intensively with the project. Blue Meridian Partners made the additional investment after HBCU Transformation Project leaders and individual campuses reported positive results from the project's initial phase. *PND, 9-14*

*Alumni Client Partner

We Know Atlanta Nonprofits

For more than 35 years, Alexander Haas has been a fixture in the Atlanta nonprofit community. We are honored to have worked with some of the largest, and some of the smallest, organizations that help make Atlanta a better place to live.

Our Client Partners

A Fresh Approach to Nonprofit Fundraising

Our services aren't cookie cutter. We don't operate with a boilerplate, merely changing names and locations. We craft each and every service we provide to match your unique needs, wants and abilities. We work hard and expect you to do the same. Together we can help you transform your organization, your fundraising, and the people you serve.

Whether your need is in Capital Campaign, Annual Fund Campaign, Major Gifts, Leadership Annual Giving, Planned Giving or all of the above, we take a fresh approach to nonprofit fundraising.

Our Services



*A*lexander·Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

www.fundraisingcounsel.com
info@alexanderhaas.com

Piedmont Place | 3520 Piedmont Place NE, Suite 450 |
Atlanta GA 30305-1512 | 404.525.7575