

Encore

A Spotlight on Philanthropy in the
Performing Arts

Alexander Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

First Things First



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www.fundraisingcounsel.com



from the home-office desk of
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Why It's Good to Talk About Planned Giving in the Pandemic

Recently, a long-time community fundraising volunteer asked me if it was okay to talk about planned giving in the midst of the COVID-19 crisis. My answer? It is not only okay; it is a good thing to do.

In fact, fundraisers across the country are reporting an increased level of donor interest in planned giving this year, and many organizations are hearing from donors that they are making or revising their intentions to make charitable bequests. Some of the reasons are financially-driven; a stronger stock market has helped portfolios rebound and changes in the way we work may spur decisions about where to live or when to retire.

But what motivates gift planning is not only about economics, it is deeply personal as well. On one level, this is not surprising since the pandemic has touched so many lives. We have also had much time with our own thoughts since mid-March to reflect on what we value most.

In the spring, we advised our non-profit partners to call their donors, volunteers, and alumni—simply to see how they were doing, and to let them know how the institution was coping. We have heard that these calls, made from home, have allowed fundraisers to connect in meaningful ways with their donors, learning more about their families and where the donors are in their own lives. And our professionals have had the chance to talk about their lives, as donors ask about their children, inquire about the health of parents, and are charmed by a child popping onto the video screen or a pet making a cameo appearance. The result is a new level of personal connections that, nurtured, will grow.

Often, fundraisers feel that they need formal training in order to talk about planned giving with donors. I have long advocated that anyone can start a conversation about planned giving, because planned giving is, at its core, simply about a person's

values.

Leaving a legacy through charitable giving is a powerful and enduring way to support the mission of organizations that matter most to us. So, yes, pick up the phone, set up the video call, or sit six feet apart—and have the talk about planned giving with your donors. It's always the right time to give someone the opportunity to act on what they believe and what they value.

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Be transparent with your
year-end appeal.
Help donors understand
how their gift will advance
your mission,
not just balance the budget.

DAVID KING

Alexander Haas



We Think You Should Know

Giving Was Up 7.5% in the First Half of 2020

According to a new survey, charitable giving in the first half of 2020 increased by almost 7.5% over the first half of 2019. That marks a big shift from the first quarter of this year, when giving was 6% behind the same period in 2019. The second quarter also marked a five-year high in the number of donors and contributions.

- Donors who gave less than \$250 were a major driver of growth, increasing 19.2% over the first six months of last year.

- The number of midlevel donors, who made gifts of \$250 to \$999, and major donors, who made gifts of \$1,000 or more, increased year-over-year by 8.1% and 6.4%, respectively.
- The overall number of donors increased by 7.2% over 2019, with new donors increasing by 12.6%.
- Donor retention increased 1.8% overall. Despite a sharp decline in the number of new 2019 donors retained in 2020, the number of repeat donors retained or recaptured from previous years increased sharply in the second quarter.

The results are from the *Fundraising Effectiveness Project*, which is managed by the **Association of Fundraising Professionals** in collaboration with **GivingTuesday** and analyzes donation data from the *Growth in Giving Database*. COP, 10-6

The **Andrew W. Mellon Foundation** award \$5 million, the largest-ever one-time investment in Black theaters across America. Through the initiative, one- to three-year grants ranging from \$30,000 to \$300,000 will be awarded to 50 Black-led theater companies. The initiative also will support the establishment of a *Black Seed National Leadership Circle*; the convening of six national networks and coalitions that will meet twice a year to collaborate on advancing the Black theater field; and a national marketing campaign aimed at sharing the story of Black theater in America. PND, 10-8

Truist Financial Corporation (Charlotte) made a \$40 million contribution to establish a nonprofit fund in support of BIPOC- and women-owned small businesses. *The CornerSquare Community Capital* fund will support community development financial institutions (CDFIs) through the purchase of 25% loan participations. PDN, 9-29

Blues Foundation (Memphis) named **Patricia Wilson Aden** president and CEO. She was most recently president and CEO of the African American Museum (Philadelphia). She succeeds **Barbara Newman**, who is retiring. COP, 9-25

Lyndsay Werking, director of development at the **American Composers Orchestra**, will now also serve as acting president. COP, 9-25

Ann Getty, a philanthropist who donated millions to arts and education groups in San Francisco, died September 14. She was 79. With her husband, Gordon Getty, they gave \$4.5 million to the **League of American Orchestras** in 2016 to bolster innovation at orchestra organizations. COP, 9-25

The **Ford Foundation**, in partnership with 15 major donors and foundations, committed more than \$156 million in support of BIPOC-led arts organizations. Grants ranging from \$1 million to \$6 million were awarded to, among others: **Apollo Theater** (NeNYC), **Ballet Hispanico** (NYC), **East West Players** (Los Angeles), and **Penumbra Theatre** (St. Paul, MN). In addition to the grants, each organization will receive up to \$100,000 in organizational capacity building support. PND, 9-25

Citi and the **Citi Foundation** committed more than \$1 billion to *The Action for Racial Equity* initiative and will offer growth capital, preferential financing, expanded procurement spending, and technical assistance to Black-owned businesses, minority depository institutions, and the communities they serve. The Foundation will award \$100 million in grants in support of community change agents working to advance racial equity in their communities, states, and across the nation. PND, 9-24

Community Foundation for Greater Atlanta awarded \$1.2 million through its *Metropolitan Atlanta Arts Fund* to support 28 arts organizations in the city that have been profoundly affected by the Covid-19 crisis. COP, 9-8

Arts Midwest and the **Mid-America Arts Alliance** awarded grants totaling more than \$3 million through the *United States Regional Arts Resilience Fund* in support of arts and cultural organizations impacted by COVID-19. Recipients include, among others: **Black Hills Playhouse** (Rapid City, SD), **Community School of the Arts** (Marion, IN), **Dayton Contemporary Dance Company** (OH), and **Dance of Asian America** (Houston). PND, 9-7

The **Motown Museum** (Detroit) received a \$3 million gift from the **Ballmer Group**, the chief philanthropic vehicle of former Microsoft CEO **Steve Ballmer** and his wife, **Connie**. The gift will support a \$25 million expansion of the museum. *WXYZ.com, 8-18*



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and ends with 30 minutes of
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News of Interest

The Billionaire Who's Now Broke...And Couldn't Be Happier

On September 14, 2020, **Chuck Feeney** completed his four-decade mission and signed the documents to shutter the **Atlantic Philanthropies**. The ceremony, which happened over Zoom, included video messages from Bill Gates and former California Gov. Jerry Brown. He had finally given away all his money to charity.

Over the last four decades, Feeney has donated more than \$8 billion to charities through his foundation. It is estimated that he only set aside about \$2 million for his and his wife's retirement. In other words, he's given away 375,000% more money than his current net worth. And he gave it away anonymously, and went to great lengths to keep his gifts secret.

While remaining under the radar, he was nonetheless a great influence on other philanthropists. When talking to *Forbes* about Feeney, Bill Gates said, "He's been a huge influence on how Warren [Buffett] and I think about philanthropy."

"I see little reason to delay giving when so much good can be achieved through supporting worthwhile causes. Besides, it's a lot more fun to give while you live than give while you're dead," he said.

Read the article [here](#). *Forbes, 9-15*

Single Women Reduced Giving Early in Pandemic

Single women were more likely than single men or couples to decrease their giving during the first two months of the Covid-19 pandemic. Nearly 40 percent of those women said they had done so because they were uncertain how the public health crisis would affect the economy — and by extension, their finances.

Only about 30% of single men and 32% of couples decreased their giving for that reason.

A new report, conducted in mid-May, tracks with other recent studies that show women have been disproportionately affected by the pandemic and its negative effects on the economy. That is in contrast with the Great Recession, which had a bigger impact on men.

The study cited other reasons single women reduced their giving:

- A third did so because they were uncertain about the further spread of Covid-19, compared with 24% of single men.
- Nearly 32% did so due to reduced income because of social distancing and business shutdowns, compared with 23.4% of single men.
- More than 30% did so because of “reduced interaction with community,” compared to 24% of single men.
- More than half of the people surveyed — 56% — said they engaged in some kind of charitable activity during the first couple of months of the Covid-19 pandemic.

Read the report [here](#).

News of Interest

Transforming *Institutions*

We are proud of our long history of providing fundraising consulting services to performing arts organizations.

[Check out our past and present clients here.](#)

Face It: Arts Organizations are *Different* Our Transformational *Fundraising Services*

Alexander Haas serves a cross section of performing arts organizations throughout the country. We specialize (and delight in) what makes you distinctive. As an arts institution, you have different needs at different times. We can help you create real results.

[Read all about them!](#)



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