



October 12, 2023



from the desk of  
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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.

## Study Shows Museum Workers Struggling

Sixty-eight percent of art museum workers have considered leaving the field, 74% cannot always cover basic living expenses, and it takes an average of 12 years before a worker receives a promotion. Turnover is high – art museums lost 30% of full-time employees hired between 2020 and 2022 – and rates were especially elevated among those making less than \$50,000 a year.

Those are the findings of a new report, *Workplace Equity and Organizational Culture in U.S. Art Museums*, by **Museums Moving Forward**, and the first formal study from the organization, in collaboration with museum professionals from around the country.

In an analysis of what drives institutional decision-making, for example, 85% of executive leaders said it was the institution’s mission, vision and/or values that served as guide. But when staff were asked that same question, 70% responded that what guides decision-making is “the museum board’s priorities.”

A survey of art museum directors published last year by the research firm Ithaka S+R shows “providing a living wage” is a top priority among museum leaders, who are aware that diversity, recruitment and retention efforts rest on this. But as that report also notes, little has changed in terms of how budgets are allocated. Plus, labor already accounts for museums’ biggest operating expense at a time when there is a “heightened uncertainty” around funding.

Museums Moving Forward surveyed 1,933 staff members from more than 54 institutions. This included major museums such as SFMOMA and the Fine Arts Museums of San Francisco, the Brooklyn Museum in New York and the National Gallery of Art in Washington, D.C.

[Read more here.](#)

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](#).

Our Facebook

## 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, excluding their primary residence, or an annual household income of \$200,000 or more, and was produced by the Indiana University Lilly Family School of Philanthropy at IUPUI in partnership with Bank of America.

The study 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



## Southeastern Museums Conference Nov 13-15

Registration is open for the 2023 SEMC Conference. Purposefully developed by a local team in Louisville, this year's theme is Truth Builds Community. Louisville, along with many cities across our country, experienced much social unrest during the past several years, and the cultural community and institutions have taken an active role in creating programs and exhibits that shed light, lift up underserved and underrepresented peoples, and create space for community engagement for healing and open dialogue. Sessions will share, examine, and promote this work in cultural institutions and the diverse communities they represent. SEMC also offers attendees direct dialogue, networking, and professional growth and development. Will you be in Louisville?

Alexander Haas is proud to be a Corporate Sponsor of SEMC.

[More information here.](#)

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## 4 Facts Everyone Should Know

1

Americans gave **\$24.67 billion** to arts institutions in 2022

2

Giving to the arts is one of the few areas that saw a **real-dollar increase** last year: a growth of 2.9%

3

In the last 3 years (2020-2022), **giving to the arts has grown by 21%**, from \$19.47 million in pandemic year 2020 to \$24.67 million in 2022

4

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Image credit: Alexander Haas is proud to provide counsel to The Columbus Museum (GA) for the *Reimagining The Columbus Museum* campaign. The expanded Museum, featuring a new Children's Gallery and Garden, opens its doors in 2024.

Data Source: Giving USA 2023, published by the Giving USA Foundation

### We Know Museums

For more than 35 years, Alexander Haas has been a fixture in the nonprofit community. We are honored to have worked with leading museums and cultural organizations across the country that help communities be a better place to live. Just ask our clients.

[Our Museum Clients](#)

## Face It: Museums are Different

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 museum's unique needs, wants and abilities. We work hard and expect you to do the same. Together we can help you transform your museum, your fundraising, and the community 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](#)



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