



RISE

Alexander-Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

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

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from the desk of
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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.

A Snapshot of State Independent Schools

Florida you're up next. Let's look at what participating schools raised in philanthropic funds in the state of Florida.

School Count 135

Advancement Median Funds Received for '22	\$909,069
Median Number of Donors	343
Median Percent Participation by Constituency & Hard Credit Funds Received	
Median % Participation by Parents/Guardians of Current Students	73.2% \$381,153
Median % Participation by Alumni/ae	7.4% \$16,072
Median % Participation by Grandparents of Current Students	22.4% \$42,677
Median % Participation by Parents and Grandparents of Alumni/ae	17.4% \$53,423
Median % Participation by Employees	100% \$14,210

Trustees	
Median Number of Trustees	9
Median Hard Credit Funds Received by Trustees	\$2,100
Median Soft Credit Funds Received by Trustees	\$39,163
Funds Received by Purpose ('22)	
Median Funds Received for Current Operations: Unrestricted	\$331,784
Median Funds Received for Current Operations: Restricted	\$174,350
Median Funds Received for Endowment	\$64,165
Median Funds Received for Other Capital Purposes	\$697,803
Median Funds Received for Irrevocable Deferred Gifts at Face Value	\$0

[Data from NAIS Facts at a Glance.](#)

Our LinkedIn

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

[Our Facebook](#)

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](#).

We Know Independent Schools

For more than 35 years, Alexander Haas has been a fixture in the nonprofit community. We are honored to have worked with so many remarkable independent schools, both secular and non-secular, across the country that help mold today's adolescents into tomorrow's leaders. Take a look at our list of independent school clients, past and present.

[Our Clients](#)

A Fresh Approach to 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 organization's unique needs, wants and abilities. We work hard and expect you to do the same. Together we can help you transform your institution, 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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