



RISE

Alexander-Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

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

March 5, 2024



The First Visit: Successful or Suboptimal

by Arthur C. Criscillis, Ed.D.
Managing Partner

I don't know that I can count the number of times a gift officer has said to me that he/she/they had a good initial visit with a prospect, but wasn't quite sure what to do next. Suffice to say, it has happened many, many times. I typically tell the officer that this is a common question. I follow that comment with the suggestion that the first visit may not have been as good as imagined. Why? One of, if not THE, main purpose of an initial visit is for the gift officer to get a better idea of what may be appropriate next cultivation steps

for a prospect. For the gift officer to not have a better idea of the next steps—and even to have proposed some as potential next interactions at the meeting's conclusion—indicates that the initial visit was not successful.

When meeting with a major gift prospect (or potential prospect in a qualifying visit), the most important task is to ask questions. It's less about what a gift officer says to a prospect than it is what a gift officer asks the prospect. If a big part of what we are doing is seeking to understand a prospect and what that prospect values, then it is imperative that we ask and listen. As a mentor told me, you never learn anything with your mouth open.

If the prospect is or has been a financial supporter of the organization, the one question the gift officer should ask without fail is "When you made your gift, what is it that motivates you to do so?" If the prospect is not a supporter, the gift officer should ask about the charities the prospect supports and the motivation that drives that support. (That's a good way to learn what the prospect values and is a good question to ask those who support us—helpful, supplemental information.) If that prospect isn't a donor but is engaged in other ways, asking about the motivation is also helpful.

If the prospect is a member or supporter of your organization, spending some time asking about the prospect's experience at the organization is also important. Why did she/he/they choose to get involved? Who were any influential staff or memorable community members? How/why? Also, ask about the prospect's impressions of the organization today.

With that information in hand, the gift officer should seek to determine areas of interest for the prospect. Based on the information gathered in the initial conversation and in light of the current strategic priorities of the nonprofit, the gift officer should indicate to the prospect that the organization will be putting emphasis on the following three or four initiatives (among others) as it moves forward. These are areas for which the gift officer will be seeking philanthropic support, but that should not be part of the conversation at this point. It is to

simply describe the three or four areas, indicating why they matter at this point and the impact they will have. After doing so, ask the prospect for her/his/their impression of/reaction to those. Do any resonate more than others?

With that having been done, it is time to open the door to hear what the prospect thinks is important. A simple, “As you think about the organization, are there any areas that—to your way of thinking—are particularly important?” This may well open the door for the prospect to discuss an organization program that may not be a strategic priority but is still an area where support would be welcome.

If a gift officer only discusses what is important to the organization, a donor’s real passion may be undiscovered. If the gift officer, in the interest of being “donor-centric”, asks the prospect about her/his/their interest, it is possible to leave undiscovered what could be an intriguing opportunity for the prospect. (“I think outreach is important, to be sure. But I didn’t know you were considering expanding and enhancing your community program. I’d like to learn more about that.”)

By spending time in an initial visit learning more about the prospect and getting that prospect’s perspective on important initiatives at the organization—whether part of the strategic plan or part of the donor’s interests, irrespective of the plan—a gift officer will be well positioned to take welcome, important and relevant next steps.

[Our Team](#)

A Snapshot of Independent Schools: Regional Associations

Southern Association of Independent Schools is up next. Let’s look at what participating schools raised in philanthropic funds in this regional association.

School Count 181

Advancement Median Funds Received for '22	\$1,729,768
Median Number of Donors	682
Median Percent Participation by Constituency & Hard Credit Funds Received	
Median % Participation by Parents/Guardians of Current Students	62.9% \$423,008
Median % Participation by Alumni/ae	6.6% \$85,248
Median % Participation by Grandparents of Current Students	14.2% \$78,501
Median % Participation by Parents and Grandparents of Alumni/ae	9.0% \$166,291
Median % Participation by Employees	93.0% \$28,252

Trustees	
Median Number of Trustees	15
Median Hard Credit Funds Received by Trustees	\$70,708
Median Soft Credit Funds Received by Trustees	\$57,400
Funds Received by Purpose ('22)	
Median Funds Received for Current Operations: Unrestricted	\$613,854
Median Funds Received for Current Operations: Restricted	\$229,378
Median Funds Received for Endowment	\$184,424

Median Funds Received for Other Capital Purposes	\$627,076
Median Funds Received for Irrevocable Deferred Gifts at Face Value	\$350,000

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

[Our LinkedIn](#)

Engaging NextGen Leaders Will Challenge Funders

While a majority of private foundations seek to involve the next generation (NextGen) in philanthropic activities, many cite engaging a younger demographic as their biggest challenge ahead.

The *2024 Client Survey* found that 62% of respondents plan to involve NextGen in charitable activities in 2024, but 35% expect difficulty in engaging younger family members. Other anticipated challenges include measuring impact (29%), creating a bigger impact (27%), devoting sufficient time to foundation matters (26%), and prioritizing granting opportunities (26%).

Other key findings

- Respondents expect to seek new grantee partners (30%), collaborate with other funders (24%), and respond quickly to disasters and emergencies (18%).
- 44% of respondents anticipated giving more money to charitable causes in 2024 than they did in 2023, with 31% also planning to support more grantees, 27% planning to increase the size of individual grants, and 29% planning to increase the total number of grants they distribute.
- 16% are considering changes to their endowments in response to the markets and economy, with anticipated changes including adding funds to their endowments (22%), increasing alternative allocations (8%), exploring impact investing (8%), and increasing equity allocation (7%).

[More here.](#)

5 Years and Counting

Shout out to Carl Hamm, who is celebrating 5 years at Alexander Haas. He joined us after serving for 8 years as the Deputy Director for Development and External Affairs at the Saint Louis Art Museum, where he completed the museum's \$145 million campaign at \$160 million.



He has 30 years of experience in the non-profit sector, working with organizations representing practically every discipline

Where We Came From... And Where We're Going



"We are still Atlanta-based.... Our roots are here."

of the arts. Before moving to St. Louis, he served as Senior Vice President for the Fort Worth Museum of Science and History.

Carl serves on the Editorial Review board for Giving USA and on the Texas Association of Museums board. He is former chair of the Standing Professional Committee for Development and Membership for the American Alliance of Museums. Holding CFRE accreditation since 1998, Carl has written and presented extensively on charitable giving over the years.

We are so happy he is on our team, and so are the museum clients he works with.

Upon the announcement that our Firm has a new owner, David King, President of Alexander Haas, sat down with **Maria Saporta** and talked about what it means to Alexander Haas and its clients, current and prospective.

That conversation, in turn, led to a trip back down memory lane, to our beginnings. It's an amazing story that begins in 1954 and Mrs. Leonard "Be" Haas.

Take a look at our history, and more information about where we are headed.

[Article here.](#)

[Our Facebook](#)

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](#)



www.fundraisingcounsel.com
info@alexanderhaas.com

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