



First Things First



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www.fundraisingcounsel.com



from the remote desk of
John H. Taylor | Partner

Are Annual Gifts a Thing of the Past?

Earlier this year we talked about the possible impact of the *Tax Cuts and Jobs Act* (TCJA) on charitable giving. The "[bumpy road](#)" our President & CEO **David King** suggested then seems to be even more uncertain now - thanks, in part, to some accounting world advice.

A likely impact of the increase in the standard deduction to \$12,000 and \$24,000 (single and joint), plus the near elimination of the deduction for state and local taxes, will drop the number of itemizers in the US to something less than 10% (according to some estimates). This means that fewer individuals will need to make a charitable donation to realize a tax savings. We have argued, however, that it is unlikely this will cause charitable giving to dry up.

People will continue to give because, well, they have a charitable nature! But for many, any reduction of taxable income is a good thing. So, to capitalize on that undercurrent there seems to be a growing sentiment in certain financial sectors that individuals should be encouraged to "bunch" or "bundle" their gifts. Rather than make an annual contribution of a modest amount to their favorite charities, their advice is to wait and make a more substantial gift every three-five years that will cause their donation amount to rise above the new higher standard deduction level.

[Read the rest here...](#)

For Boards and CEOs: 3 Metrics That Matter

In the current universe of information overload, it's easy to feel like you're drowning in a sea of numbers. Whether you're Board chair, CEO, development committee chair, or an attentive Board member, what fundraising metrics matter the most?



Previously, Alexander Haas Partner Nancy Peterman weighed in on this topic with sound advice for fundraisers. Now, Partner, Sandra Kidd, who often consults with museums and arts groups, weighs in as well. She frequently gets this question from volunteers and senior management: "What should we consider when measuring performance?"

First and foremost, of course, it's how much money gets raised. But please don't stop with reading the budget report.

[And here's why....](#)

Listen and Learn....



Understanding the Repeal of the 80/20 Rule

The recently passed tax legislation disallowing 80% of tax-deductible "gifts" has raised issues when it comes to athletic seating deduction/counting. Athletic departments now require individuals to pay for the privilege of purchasing season tickets. On this edition of *Futures in Fundraising*, **Tom Jennings**, Vice President of University Advancement and President of the **Florida State University Foundation** joins Alexander Haas President and CEO, David King, to break down what all this means for colleges and universities.

Download our guide to [Overcoming Objections](#) for additional fundraising help.

[click on picture for podcast](#)



Are You Listening to Our Podcast?

NonprofitNews.com thinks you should! The website's **Donorbox Blog** lists our podcast **Futures in Fundraising** #4 on a list of **8 Podcasts for Nonprofit Founders (in 2018)**.

Catch a new episode of Futures in Fundraising each month on Tuesdays at



10:00 am (EST) on Facebook Live.

To download this show and catch up on others, find us on iTunes.

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A promotional graphic with a grey background. At the top, the text 'Turn their NO into a YES!' is displayed, with 'NO' in a yellow speech bubble and 'YES!' in a green speech bubble. Below this, a purple rectangular box contains the text 'DOWNLOAD YOUR FREE GUIDE: Overcoming Objections' in white. At the bottom, the Alexander Haas logo is shown, featuring the name 'Alexander Haas' in a script font and the tagline 'TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES' in a smaller, sans-serif font.

Great Client News

Sweet Briar A Most Innovative School



Alexander Haas Client Partner **Sweet Briar College** was named one of the nation's **Most Innovative Schools of 2019** by **U.S. News & World Report**. In the magazine's most recent **Best Colleges** rankings, Sweet Briar tied for 21st place with Oberlin, Swarthmore, Bowdoin and others in the National Liberal Arts Colleges category. Nominated by higher education leaders around the country, Sweet Briar ranked higher than any other college or university - national, liberal arts or regional - in the Commonwealth of Virginia. The **Most Innovative Schools** ranking is based entirely on peer votes and schools had to be nominated by at least seven evaluators to make the list.

In Sweet Briar's case, innovation has been comprehensive and multilayered. In addition to curating an academic curriculum built on its areas of excellence, the College reduced tuition to make the superlative education at Sweet Briar affordable and the true cost more transparent. A sustainable budgetary restructuring positioned the size of the College's administration to grow alongside student enrollment over the long term.

Congratulations. We are proud to have been a part of your journey and transformation.

Events & Conferences...Look Who's Talking

CASE III, One-Day Workshop

November 5, William Peace University, Raleigh, NC

8:30 AM - 3:30 PM

Arthur L. Criscillis, Ed.D., Managing Partner

Increasing Gift Officer Effectiveness



We'd Like You to Know...

Transforming Institutions

[Take a look at our past and present
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Our Transformational *Fundraising* Services

You're just a jump away from learning about all the fundraising aids Alexander Haas has in its vault of Transformational Services.

[***Jump!***](#)



Piedmont Place
3520 Piedmont Road NE Suite 300
Atlanta GA 30305-1512
(404) 832-9200 info@fundraisingcounsel.com



This email was sent to: gingerchakalall@me.com

This email was sent by: Alexander Haas
Piedmont Place, 3520 Piedmont Road, N.E., Ste. 450 Atlanta, GA 30305

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