



Team

The Education Advancement Monitor

Alexander Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

October 26, 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.

Current & Recent Client News

Washington & Jefferson's Historic Gift

Alexander Haas Client Partner **Washington & Jefferson College** (W&J) in Washington, Pennsylvania, received a \$50 million gift from the estate of **Anica Donnan Rawnsley**. The largest gift in the college's history will support a scholarship endowment in Rawnsley's name and provide need-based support to students from the Washington County region of Pennsylvania.

Rawnsley, who passed away in August, had become W&J's first female trustee in 1975. Although she grew up in Washington, she did not attend W&J, which was an all-male institution until 1970. But her affinity for the institution was instilled by the many members of her family who were alumni, including her father, her stepfather, two grandfathers, and two uncles. *NPD, 10-16*

Congratulations to W&J!

Fort Lewis College Major Gift

Congratulations to our Alumni Client Partner **Fort Lewis College** who received a \$10.4 million gift from Jane and Marc Katz to support a range of programs in the School of Business Administration, including financial aid, a student-run marketing agency, a faculty and student development fund, three endowed professorships, and a scholarship program for Indigenous business students. Marc Katz co-founded with his brother, Jeff Katz, Mercury Payment Systems, a payment-processing company in Durango, Colo. The company was acquired by Vantiv in 2014 for more than \$1.6 billion. Marc Katz is now retired.

UNCF Philanthropy Institute to Culturally Train Fundraisers

UNCF (United Negro College Fund) launched its **Philanthropy Institute**, which aims to reimagine the practice of fundraising by leveraging culturally informed expertise and a commitment to racial justice and social equity. Supported by the UNCF Teaching + Learning Center, the institute will work to address the unique needs of fundraisers working with BIPOC communities. Believed to be the first of its kind, the institute is designed by and for fundraising professionals at Black and other underserved organizations such as historically Black colleges and universities (HBCUs).

According to UNCF, Black donors give 25% more of their income than other racial groups, yet the professionals who fundraise in these communities may not have the insight or training to work within this demographic. To remedy that situation, the institute will serve fundraising professionals at educational institutions as well as fundraising and nonprofit organizations to help them achieve their professional goals and objectives. In addition, it will provide consulting services for organizations looking to expand their fundraising capabilities. *PND, 10-12*

UNCF is an Alumni Client Partner of Alexander Haas.

Several major donors have said they plan to stop giving to universities that fail to issue strong statements condemning attacks against Israel by Hamas, the Palestinian group that controls Gaza. But the issuing of political statements by nonprofits and for-profits has not been common practice until recently, and many institutional leaders are wondering when, how, or if they should weigh in.

For instance, after a 34-year partnership, the Wexner Foundation will end its financial and programmatic relationship with Harvard and the Harvard Kennedy School, condemning the University's response to the Hamas attack on Israel as a "dismal failure."

Nonprofits and educational institutions rarely have issued statements on foreign wars or national or societal events unless it was central to their work. But in 2020, many nonprofit and for-profit institutions issued public statements after the police murder of George Floyd, often endorsing the Black Lives Matter movement and making pledges to advance racial justice.

[The Chronicle of Philanthropy](#) takes a close look at when to make a statement and how.

1. Issue a statement when it is related to your institutions core mission.
2. Focus on your mission, not your opinion.
3. Create a policy. Don't issue on an ad hoc basis. Have a consistent message.
4. Expect pushback. A university should speak out in support of core principles, even if there is backlash from students, faculty, alumni, or donors.

[More here.](#) Subscription may be required.

[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](#).

We Know Colleges & Universities

For more than 35 years, Alexander Haas has been a fixture in the nonprofit community. We are honored to have worked with so many large and small college and universities; both public and private institutions, across the country. These schools that help mold today's young adults into tomorrow's leaders. Take a look at our list of higher education clients, past and present.

[Our Client Partners](#)

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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