

RISE

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

Alexander Haas
TRANSFORMING INSTITUTIONS THAT TRANSFORM LIVES

First Things First



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www.fundraisingcounsel.com



from the standing-desk of
David H. King | President & CEO

Buckle Up...It Could Be a *Bumpy* Ride

Here's what we know: The United States has a new set of rules for income taxation.

Here's what we don't know: What do these new rules mean to philanthropic giving?

Individuals and businesses are struggling to figure out what impact, if any, the new tax law has on them. This is especially true for the nonprofit sector.

The new tax bill DOES contain a piece of good news for nonprofits. **Individuals can deduct charitable gifts totaling up to 60% of their income, as compared to 50% under the previous tax law.** However, the bill doubles the standard deduction and places limits on the deduction of mortgage interest, state income taxes and property taxes. Because of these changes, experts estimate that only 5% of 2018 taxpayers will file an itemized tax return - and if you don't itemize your tax return, you aren't allowed to deduct your charitable contributions.

As Patrick Rooney, *Professor of Economics and Philanthropy and Director of the Lilly Family School of Philanthropy at Indiana University*, told *The Chronicle of Philanthropy*, for those who choose not to itemize under the new law, "Their cost of giving goes up dramatically." In the same article, Rooney predicts that charitable giving will decline by \$14-billion in 2018. That is 5% of the roughly \$282-billion U.S. charities received from individuals in 2016. Rooney adds, "**The new laws will absolutely have a negative impact.**"

[Now, here's what we suggest you do now....](#)

Tax Reform and Nonprofit Clout

In the wake of Congressional passage of the tax reform bill, *The Chronicle of Philanthropy* provided a thoughtful perspective in its December 20 Daily Update. [**Nonprofits Regroup for Budget Fights Ahead After Stinging Loss on Tax Bill**](#) analyzes the minimal impact the not-for-profit community seemed to have as it conveyed its concerns about the bill's potential dampening effect on giving.



Early in the debate, the *Chronicle* published an opinion piece that took the not-for-profit community to task for coming off as just one more interest group. A not-so-flattering comparison was drawn with mortgage bankers who proclaim their support for tax reform as long as the mortgage-interest deduction is preserved.

[Suggested Reading....](#)

Successful Campaigns Require Planning
ARE YOU READY?

Take Our
CAMPAIGN READINESS
Assessment

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Client & Peer *Highlights*

Big Fundraising Gains in 2017

Some nonprofits and online-donation portals are reporting big increases in gifts last year compared with 2016 - an early indication that giving may have jumped substantially at charities nationwide in 2017. That may be especially true for large organizations that appeal to the nation's wealthiest donors.

- **Schwab Charitable** saw a roughly 80% increase in the number of contributions to its donor-advised-fund accounts from July through December 2017 - the first six months of its fiscal year - compared with the same period in 2016.
- Though still tallying numbers, **Fidelity Charitable** said contributions to its accounts in 2017 appear to have outpaced the \$6.6 billion given in 2016.
- People gave \$8.5 billion to nonprofits through **PayPal** last year, a roughly 16% increase from 2016. From November 27 through the end of 2017, donations made through PayPal increased 19% over the same period in 2016, to more than \$1.1-billion.
- Giving on smartphones and tablets also continued its years-long growth: About 21% of contributions through PayPal in the holiday season were made through a mobile device - a 14% increase in the number of mobile gifts over 2016's year-end fundraising period.

The Chronicle of Philanthropy, 1-11-18 & 1-5-18

From Volunteer to Development Director

One school, one mission, one campus. That vision inspired **Natasha Lebowitz** to accept a position on the board for the **Atlanta Jewish Academy**. But what started as a volunteer position, moved into full-time dedication when Natasha became Development Director for the school. In this podcast, she and Alexander Haas CEO, David King, talk about that transition, how Natasha's mentor inspired her to reach for more in the fundraising field, and share tips for others looking to develop their career.

Catch a new episode of **Futures in Fundraising** each month on Tuesdays at 10:00 am (EST) on Facebook Live.



[Listen here...](#)

We'd Like You to Know....

Team Member Spotlight: **Mark Belcher**

Don't let Alexander Haas Partner **Mark Belcher**'s seemingly quiet demeanor fool you... he can help invigorate your fundraising program. When Mark served as President of a large hospital foundation, he took an underperforming development operation and transformed it - securing in excess of \$35-million in philanthropic support to the foundation which included the institution's largest ever goal surpassing capital campaign.

In this month's Team Member Spotlight, Mark shares how he keeps track of industry trends and why the number of healthcare organizations in need of fundraising counsel continues to grow.



[Have a listen...](#)

Our Transforming *Fundraising Services*

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

[Jump!](#)

Transforming Institutions

Welcome New Client Partner

Christ Church Episcopal School in Greenville, SC is a new Client Partner. We



have been retained to conduct a Leadership Interview Study.

[Our Independent School Client Partners.](#)



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