

# 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](http://www.fundraisingcounsel.com)



**G. Douglass Alexander**, a Founding Partner of Alexander Haas, left this world April 6. He was a southern gentleman who made a lasting impression on those he met with his passion for excellence, dry and sarcastic sense of humor, his knowledge of how to guide nonprofits to success, and his basketball hook shot. Our hearts are with his family. Doug retired from Alexander Haas in 2007, but his legacy lives on here at the firm that bears his name and with the thousands of clients the firm has served and continues to serve.

[Read about Doug's life and legacy here.](#)

from the education-focused desk of  
**Arthur L. Criscillis, Ed.D.** | Managing Partner

## Training in the Time of COVID-19

In conversations with clients and colleagues, I have heard that training is high on everyone's list. With travel prohibited, many staff members are seeking additional training opportunities and many leaders are trying to structure appropriate learning opportunities for their staff members. That is well and good—an excellent way to utilize time.



Let me offer a suggestion for *Training in the Time of COVID-19* (apologies to Gabriel Garcia Marquez) of development officers that should actually become part of our general training regimen for gift officers. This suggestion is born of several factors—my own experience, my work with many, many gift officers as both supervisor and consultant, and my review of any number of training opportunities afforded front line fundraisers.

First some background. In working with a front-line gift officer to assist in strategy development for prospects, I was reminded of a gap in his understanding. He was interested in developing an approach for an alumnus, who did not give personally, although the accounting firm for which he is the founder and managing partner made contributions. It was clear to me that he failed to recognize that gifts from the firm were, in fact, to some degree coming out of the alumnus' pocket. While there was merit in working with that alumnus to secure an individual gift, to approach him as though he were not giving would be a mistake. In short, his lack of understanding of the differences among corporations was proving to be a problem in his work with a prospect.

That reminded me of my early days as a gift officer. I remembered dealing with a number of prospects who were involved in the world of investments. One was a hedge fund manager whose fund was a fund of funds, giving investors access to a good array of other hedge funds—sort of like a mutual fund approach to hedge-fund investing versus owning one specific fund. Let's just say that, as he explained what he was doing, I was lost. I had no idea what a hedge fund was; to say nothing about some of the strategies those funds employed. I nodded, smiled and kept quiet. Another did technical analysis for a mutual fund company...say what?? A third ran a fund that employed a long-short strategy designed to give investors a steady return. As he described it, "This fund is for people who want to have a reasonable return on their investment. I'll never hit a home run, but neither will I read the headlines and immediately get nauseous." One other was employed by Bain Capital. As he described what this private equity firm did (and I had no idea what private equity even meant), I struck that "smile, nod, repeat" posture so familiar to me (and others) when being told something about which I know nothing.

So, what's the point of this? I have come to believe that we would serve our budding (and some who may be in full-bloom) professionals well by ensuring that they have a basic—and I do mean basic—understanding of the language and structure of the business/finance world. Having a degree of fluency in those areas would be beneficial to most. Many of the prospects they will work with, will live in one or more of those worlds. Many who do not, will still have a familiarity with one or both. We take great pains to educate gift officers in the profession. We also make sure that they have a good understanding of our institution. We provide them with continuing education opportunities of all sorts. Yet, I am fairly convinced that we do not serve them nor our profession well if we do not include the basic concepts and language of business and finance as part of their overall introduction to the profession. In doing that, we have resources galore, including faculty, our alumni or select board members, if we choose to use them. They could assist us in designing the training and even help with instruction...high-level, broad, but sufficient to give them some degree of fluency. In doing so, we are likely to help them become even more effective in their work with their prospects. So, as you think about the training or professional development you want to provide your staff—or some part of it—during this time of COVID-19 social distancing, give some consideration to this. Once we can return to normal (or a new normal), consider how it can be one essential component of the education of a gift officer.

## COVID-19 Impact on *Education*

### **Breaking News on Round Two Funding for COVID-19 Aid**

Congress should be approving round two of the **Paycheck Protection Program** this week, authorizing \$310 billion in additional aid. The program is intended to benefit small businesses, including non-profit organizations, by helping them cover payroll and operating expenses.

Round One exhausted its funding in less than two weeks, and funds for Round Two are not expected to last long, in part due to the number of applications in the pipeline when Round One funding ran dry.

[The NonProfit Quarterly wrote about](#) the experiences of several nonprofits in seeking Round One funding. One of the best pieces of advice:

- **Move quickly**, and, if you can, make your request through a smaller local lender such as your community bank. And, if you don't have a relationship with a local bank, ask your board members or key volunteers.

### **Gifts to Education Slipping During Pandemic**

In the wake of the pandemic, support for educational nonprofits has slipped since the crisis crisis started, according to a new survey by *Luth Research* and the *Nonprofit Institute at the University of San Diego's School of Leadership and Education Sciences*, in partnership with *The Chronicle of Philanthropy*.

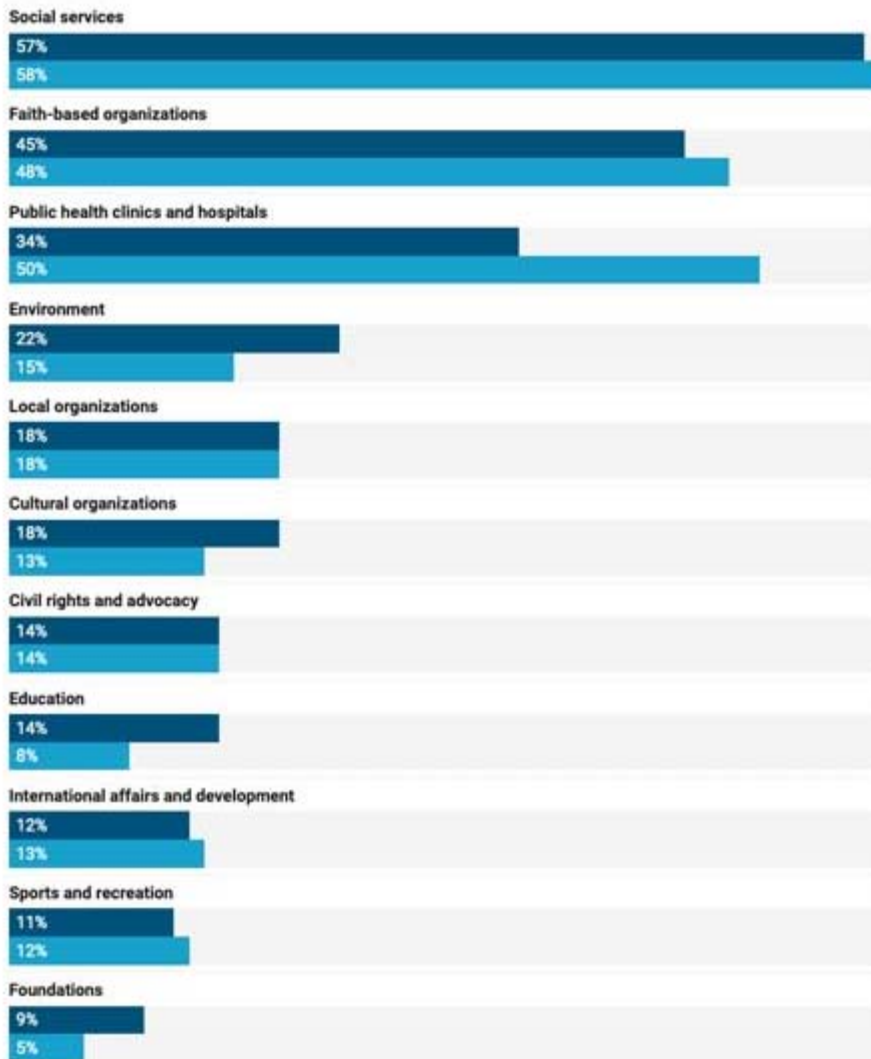
Fourteen percent of those surveyed they had given to an educational nonprofit in the year before the pandemic. Only 8 percent said they have given or plan to give to an educational nonprofit since March. *COP*, 4-29

### **Here's a Snapshot**

## How the Coronavirus Has Affected Giving

The pandemic has caused some Americans to shift the causes they support

■ Percent who gave to nonprofits 12 months before pandemic ■ Percent who have given or plan to give to nonprofits since March



## News You Can Use

### It Bears Repeating: Stimulus Bill Includes Help for Nonprofits

The \$2 trillion stimulus signed by President Trump, expands the charitable deduction to all taxpayers for a year, makes nonprofits eligible for federal loans that could be largely forgiven, and boosts tax incentives for corporate giving, according to nonprofit analysts. The stimulus bill will allow nonitemizers to deduct up to \$300 in cash giving for the 2020 tax year.

For those who itemize, the bill lifts the cap on annual giving from 60% of adjusted gross income to 100%. For corporate charitable giving, the bill raises the annual limit from 10% to 25% of taxable income. The cap on deductibility of food donations from corporations would increase to 25% of taxable income, up from the current 15% cap.

[Go here](#) to get more information about how the stimulus bill will benefit nonprofit organizations.

### **"This meeting could have been an email."**

Meetings have fallen out of favor in the workplace. Business leaders view them as a waste of time, and employees rejoice when they are canceled. This anti-meeting mindset might be gaining popularity, but is it misguided? This mindset is a product of gatherings that lack direction and lull attendees into a default mindset that "this could have all been covered in an email." As the coronavirus pandemic forces teams to transition to remote work, it is pivotal for business leaders to stay connected with their teams and provide virtual venues for discussion and collaboration.

Here are three tenets that can make any meeting productive:

1. **Preach preparedness.** Set an agenda before each meeting, distribute it ahead of time, and ask employees to do their homework. Everyone can hit the ground running and devote the bulk of the meeting to brainstorming and innovating.
2. **Set the rules.** Create clear ground rules for your virtual meetings, and hold your team accountable to those standards. You might consider requiring employees to be on camera at all times and asking them to close all tabs on their laptops.
3. **Focus on the future.** Every meeting should conclude with an action plan. Employees should know what is expected of them between now and the next meeting.

The coronavirus crisis is not the time to cancel meetings. During this pandemic, they play an essential role in keeping your company connected and helping it turn ideas into action.

## **We'd Like You to Know...**

### **Transforming Institutions**

For more than 30 years, Alexander Haas has been a fixture in the nonprofit community. We are honored to have worked with some of the largest, and some of the smallest, independent schools that help transform our nations adolescents into our next leaders.

[Our Independent School Client Partners](#)

### **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.

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