

Donor 2019-2021 Journeys Initiative

Frey Foundation Chair for Family Philanthropy
Dorothy A. Johnson Center for Philanthropy



A Journey We Chart Together

Every donor has a journey. Every giving family has a story to tell about their philanthropic path and past. And in many ways, these experiences are shared across family philanthropy. Donors who are just starting out often ask similar questions and face predictable choices, while many of philanthropy's more seasoned travelers share an eagerness to pass on what they've learned and to blaze new trails. Still, no two donor journeys are exactly alike.

Some donors travel alone, some with a spouse, and some with many generations of family on board. Some want a detailed map as they begin to give. Others prefer to wander. And almost all donors are faced at some point with an unexpected fork in the road; how they react and redirect their passion is often what most defines and differentiates their story.

These journeys are not just tales of historical interest. A donor's journey deeply influences that donor's giving, values, strategies, knowledge, skills, and ultimately, impact. The process matters, and even the bumpiest road can lead to a more rewarding giving experience. As a field, we need to learn more about what goes into a successful donor journey, and actively share these lessons with family donors of every sort. This is especially true in a time of great change and generational transition in family philanthropy.

To this end, the Dorothy A. Johnson Center for Philanthropy is launching a Donor Journeys Initiative under the leadership of the Frey Foundation Chair for Family Philanthropy, Dr. Michael Moody. The initiative will be of benefit to many audiences striving to advance and enhance family giving, from family and community foundations, to philanthropic and wealth advisors, to support organizations, and many others.

As a leading university center on philanthropy, the Johnson Center has a distinctive focus on bridging the gap between the latest research and the everyday practice of philanthropy in communities across the country. The Donor Journeys Initiative will live beside and within the Center's many existing platforms for grantmaker and donor learning, including The Grantmaking School, LearnPhilanthropy.org, and the peer-reviewed journal *The Foundation Review*. The Center also has a special focus on family philanthropy, as the home of the Frey Foundation Chair, the nation's first endowed chair in family philanthropy. Dr. Moody works on an international scale to improve both the understanding and practice of family giving, and has spearheaded previous initiatives on donor intent, collaboration, and other topics — including convening four previous National Summits on Family Philanthropy. He is also a well-known expert on philanthropic learning and donor education, especially among the next generation of donors.

In short, a donor's journey is not just a fascinating tale, it matters for better giving. But perhaps the best thing about the donor journey is that, if done well, it never ends. The joy of giving is found along the journey itself — not merely at some final destination. Yet more reason to examine and embrace these continuous, complicated, and fulfilling paths!



The Work of the Donor Journeys Initiative

The Donor Journeys Initiative is an integrated suite of events and projects that will be produced over the course of two years. Each element of the initiative looks to evaluate and analyze donor journeys, while always respecting the unique experiences of donors and families. Each element will advance family philanthropy's understanding and maximization of the donor journey in specific and complementary ways.

National Summit on Family Philanthropy (2019)

The Donor Journeys Initiative kicks-off at the National Summit on Family Philanthropy in Fort Lauderdale, Fla. in January 2019. This premiere event, curated and led by the Frey Chair, is held biennially and offers attendees the opportunity to share challenges and wisdom from their own donor experiences. The 2019 Summit, *Our Donor Journeys and Why They Matter*, will bring together approximately 150 family donors, those who work closely with them, and national thought leaders for in-depth, practical dialogue.

Attendees will have the chance to reflect on their own journeys, and share and learn with other donors whose giving has improved because of where they've been and what they've learned. The summit will be held January 28–29 at the Conrad Hotel. For more information, visit JohnsonCenter.org/Summit.

Summit Replay (2019)

The National Summit on Family Philanthropy is designed to be an intimate experience where peer-to-peer synergy fuels creative dialogue and ideas for more effective practice. Yet the discussions, debates, and presentations that take place at the summit have great value for the entire field of family philanthropy. Summit Replay enables us to maintain the intimate nature of the summit itself, and the value of live attendance, while amplifying the conference's impact with a far broader audience. Portions of the 2019 summit — including the keynote and plenary panels — will be recorded and edited into a polished video product(s) and made available via the Johnson Center's website within a few months. The footage may also be combined with other donor journeys resources into a package for purchase and/or integrated into existing platforms like the Johnson Center's LearnPhilanthropy.org. Viewers will be charged a moderate fee in order to preserve the National Summit conference model.

Webinars/Podcasts (2019–2020)

Throughout this two-year project, Dr. Moody and relevant program partners will integrate the work of the Donor Journeys Initiative into larger Johnson Center series, such as the *Field Notes in Philanthropy* podcast and Johnson Center-hosted webinar series. Webinars and podcasts are an ideal platform to explore more specific or small-scale questions, findings, individual family scenarios, and more, and the Johnson Center offerings already have a growing national and international audience of family philanthropists, field-wide professionals, and thought leaders.

The Frey Chair will develop and produce approximately 2–3 webinars and podcast episodes concentrating on: issues raised at the National Summit, findings from his Next Gen Donor Learning research and Donor Journeys book, or other topics related to donor journeys.

Next Gen Donor Learning Research (2019–2020)

Dr. Moody will design and lead a new applied research project examining the donor learning and identity journeys of those “next gen donors” who will lead family philanthropy for the next several decades. These donors, currently in their 20s–40s, will be the most significant philanthropists in history, giving unprecedented resources in ways that promise to transform the field.

Building on insights from the pioneering research published in *Generation Impact: How Next Gen Donors Are Revolutionizing Giving* (co-authored by Dr. Moody and Sharna Goldseker of 21/64), this new investigation will

continue the research partnership and explore the varieties of next gen donor journeys, identifying shared challenges, patterns, and differences that will inform the practice and strategies of family philanthropy going forward. It will examine trends in how some next gen donors are stepping into leadership roles, using different vehicles, or taking new risks — and identify the likely determinants of these donor journey patterns. This project will involve collaboration with other noted scholars of donor learning and/or organizations looking for insights on how to better advise the donors they support (e.g., donor-advised fund providers, donor networks, community foundations, donor education programs).

Donor Journeys Book (2019–2020)

A signature product of the Donor Journeys Initiative — and a prime vehicle for its long-term impact — will be a book containing a series of first-person essays by donors describing their journeys, and an analytical introduction and conclusion by Dr. Moody. The book is intended to demonstrate the importance of the donor learning experience, to offer lessons for other donors and the field, and to share some of the Frey Chair's research findings. Donors included in the book will be diverse in several enlightening ways — e.g., donors of different ages and ethnicities, international donors, donors driven by faith and those driven by social justice, first-generation donors as well as those coming of age in philanthropic families, and much more. The resulting volume will have great value for the field both as a source of practical lessons and as an engaging set of thought-provoking stories told well.

Case Study (2019)

With a partner family foundation, the Frey Chair will research and write a case study of donor learning within that foundation. Topics/themes can include: Next gen learning and life-long trustee learning, learning with grantees and peer funders, or other dynamics. This case study would be used for teaching and professional development, research/scholarship, field learning, and more. It would also be integrated into other Johnson Center learning platforms as appropriate, such as LearnPhilanthropy.org, The Grantmaking School, and *The Foundation Review*.

Special Issue of *The Foundation Review* (2020)

The Foundation Review, the nation's first peer-reviewed journal of philanthropy, celebrates its 10th anniversary in 2018. During the Donor Journeys Initiative, Dr. Moody will guest-edit a special issue of the journal focused on best practices and case studies in donor learning. A call for papers will go out in mid-2019 for article ideas, such as pieces about family foundation trustee learning, learning within collective giving processes/networks, research on the dynamics of learning, community foundation donor education efforts, and more. Ideally, some of the articles included in the final issue will connect to other research and writing shared through the Donor Journeys Initiative.

Other Potential Collaborations

Do you or your organization have an idea or intriguing question related to family donors' journeys? Are there other organizations or scholars you are aware of who are currently examining this unique aspect of philanthropy? The Frey Chair is open to new collaboration ideas with other donor education organizations, efforts, and platforms in ways that would benefit both organizations and encourage broader use of learnings and products from the Donor Journeys Initiative and their dissemination.

The total estimated budget for the Donor Journeys Initiative is \$430,000.

How Can You Help?

Your generous support of the Donor Journeys Initiative will power the work that enables your friends and colleagues to better understand this crucial aspect of family philanthropy. Support for the full initiative will have the most profound impact, but there are several opportunities available for those who wish to see individual elements of the Initiative through, start to finish.

The Johnson Center and Dr. Moody are grateful for your consideration and eager to count you among our partners. Together we will facilitate productive and empowering journeys for donors, their advisors, and the community of philanthropic professionals who turn our passions into progress every day.

All supporters of the Donor Journeys Initiative will be gratefully acknowledged by name on the Donor Journeys Initiative website, on materials and signage for the National Summit on Family Philanthropy, and in the Johnson Center's Annual Report alongside other comparable level supporters.

All donors above \$10,000 are invited to include their personal/organizational logo, as well. Names and logos will be sized according to the level of each gift.

Full Initiative Support

Supporters of the full Donor Journeys Initiative will be gratefully acknowledged in all Donor Journeys Initiative print and digital materials and via Donor Spotlights on Johnson Center social media. You/Your Organization will also receive complimentary copies of and/or access to all Donor Journeys products, and four complimentary registrations for the National Summit on Family Philanthropy, where your support will be acknowledged from the podium.

The Johnson Center and Frey Foundation Chair for Family Philanthropy are pleased to offer additional thanks in the form of quarterly email updates on the progress of the Donor Journeys Initiative (2019–2021), a customized talk from Dr. Moody for your chosen audience, and a Welcome Packet containing a signed copy of Dr. Moody's book *Generation Impact: How Next Gen Donors are Revolutionizing Giving* and complimentary access to forthcoming LearnPhilanthropy Academy courses.

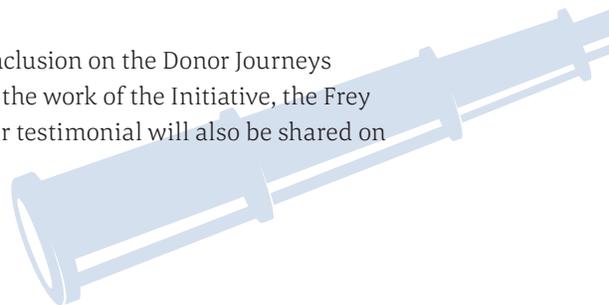
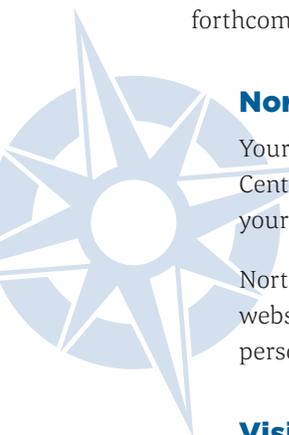
North Star Leaders: \$150,000 and above

Your leadership support will be celebrated via a front page banner (on a rotating carousel) on the Johnson Center's website that will appear for one month. Dr. Moody will also schedule quarterly phone calls with you/your organization to share updates on the progress of the Donor Journeys Initiative.

North Star Leaders are invited to provide a video testimonial for inclusion on the Donor Journeys Initiative website. You are also invited to provide a guest post for publication via the Johnson Center's blog on your personal/organizational donor journey.

Visionaries: \$75,000 and above

Visionaries are invited to provide a written testimonial and photo for inclusion on the Donor Journeys Initiative website, sharing why you/your organization chose to support the work of the Initiative, the Frey Foundation Chair for Family Philanthropy, and the Johnson Center. Your testimonial will also be shared on the Johnson Center's social media and other appropriate channels.



Individual Element Support

Your lead support for any specific product of the Donor Journeys Initiative will be acknowledged on the Donor Journeys Initiative website. **All individual element supporters receive two complimentary registrations to the National Summit on Family Philanthropy.**

Explorers: \$50,000 and above

All supporters at the Explorer Level will receive two (2) donor spotlight posts on you/your organization and mission featured on the Johnson Center's social media channels.

National Summit on Family Philanthropy

Your support will appear in a special block ad in the *Our Donor Journeys and Why They Matter* program, and your support will be acknowledged from the podium by Dr. Moody.

Donor Journeys: Next Gen Donor Research

Your lead support will be acknowledged in the research report in a block ad. You will receive complimentary copies of the research report, and Dr. Moody will provide a customized talk on the research findings for your chosen audience.

Special Issue: The Foundation Review

Your lead support will be acknowledged in the special issue in a special block ad and on the special issue webinar with a separate slide. You will also receive complimentary copies of the issue.

Donor Journeys Initiative Book

Your lead support will be acknowledged within the book and on the book's website. You will receive complimentary copies of the book, and Dr. Moody will provide a customized talk on the book's development and contents for your chosen audience.

Navigators: \$30,000 and above

Donor Journeys: Case Study

Your name/organization's name and logo will appear in the case study report. You will receive complimentary copies of the case study report, and Dr. Moody will provide a customized talk on the case study's findings for your chosen audience.

Surveyors: \$15,000 and above

Summit Replay

Your name/organization's name and logo will appear on a special, stand-alone slide in the Summit Replay video(s).

Donor Journeys: Webinars & Podcasts

Your name/organization's name and logo will appear on a special, stand-alone slide in all Donor Journeys Initiative webinars, and your support will be acknowledged on-air during any podcast episodes.

General Support

Friends of the Donor Journeys Initiative: \$10,000 level (or below)