

Donor 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 (Johnson Center) has launched the 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 and LearnPhilanthropy.org.

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 five 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.

For more information, visit JohnsonCenter.org/DonorJourneys.

National Summit on Family Philanthropy

The Donor Journeys Initiative kicked off in January 2019 at the National Summit on Family Philanthropy: *Our Donor Journeys and Why They Matter*. Nearly 100 attendees — family donors, philanthropy advisors, national and thought leaders — gathered in Fort Lauderdale, Fla. for this premiere conference, curated and led by the Frey Chair. Three extraordinary, moving panels, a round of in-depth workshops, and inspiring site visits encouraged this family philanthropy community to share challenges and wisdom from their own donor experiences.

For more information, visit JohnsonCenter.org/Summit.

Summit Replay

Summit Replay aims to amplify the conference's impact with a far broader audience. Portions of the 2019 Summit — including all three plenary panels — have been polished into video products and made available on the Johnson Center website to mark the one-year anniversary of the event. These powerful videos are accompanied by a written reflection from the Frey Chair on the moving lessons and lasting impact of these conversations.

Donor Journeys Book

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.

Donor Learning-in-Partnership Research

Dr. Moody will design and lead a new applied research project examining how donor learning can — and should — take place in the context of close partnerships with nonprofits. The relationship between major donors and their nonprofit partners is becoming even more meaningful given current trends — e.g., the increasing reliance on high-level donors across the sector, and the increasing desire by both sides (and especially among next gen donors) to improve this relationship. Calls for more “participatory” grantmaking and more engaged and responsive giving are well-received, but we do not necessarily know how to answer this call.

Specifically, we need to know more about how individual and family donors can learn, change, and evolve to become better partners. What do donors need to support this learning? How does this journey adapt over time in the context of close partnerships? This project will address these and other crucial questions through interviews with major donors who have experienced this sort of “learning in partnership,” as well as close analysis of ten partnership cases using data from both donors and nonprofits.

Webinars

Webinars are an ideal platform to explore more specific or small-scale questions, findings, individual family scenarios, and more, and the Johnson Center's platforms already have a growing national and international audience of family philanthropists, field-wide professionals, and thought leaders.

Over the course of the initiative, the Frey Chair will develop and produce three webinars concentrating on issues raised by donors participating in the initiative, findings from new donor learning research, and other topics of interest and use to the broader philanthropic field.

Donor Journeys Case Study

The Frey Chair will research and write a case study of a family or community foundation that has committed itself to donor learning in a sustained way, and that can be used to draw lessons for the field. Topics/themes can include: Next gen learning and life-long trustee learning, learning with peers, the benefits and costs of different learning vehicles, 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*.

Toolkit: *My Philanthropic Autobiography*

Everyone has a deeper connection to philanthropy than they might realize, and each of us has stories to tell about our own learning and development as a giver. In short, we could all write our own “philanthropic autobiography.”

Building on informal exercises conducted over several years, past writing about the topic, and new innovations in designing tools for personal reflection, the Frey Chair will develop and formalize an engaging and user-friendly tool for donors of all sorts called *My Philanthropic Autobiography*. The tool will be developed for use by individuals or families together, and will guide and stimulate intensive reflection about each user's personal journey as a donor, and about how current giving aligns with this meaningful past. The tool will generate stories, reflection notes, and other creative outputs that can then be utilized for many purposes.

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.