



Overview

Learning how to be a "better" giver has been a prominent theme in philanthropy since giving moved from direct charity to a formalized and professionalized effort to improve our world. Donor education is critical to giving thoughtfully, strategically, and with impact. According to the 2023 Bank of America High Net Worth Study of Philanthropy, just over 40% of HNW individuals have a plan for their giving and 63% indicated they would like to be more knowledgeable about some facet of their charitable giving.

The Donor Education Research project recognizes that donor education is important and asks, more specifically, what difference can it make? Can it be utilized to unlock 'better' giving? The project will run three cohorts through a new donor education curriculum — From Passion to Impact: A Framework for Thoughtful Philanthropy — and identify changes experienced by the participants in their actual giving.

The Donor Education Research project is a robust example of research-to-practice in action. The program combines a practical donor education experience with the opportunity to contribute to research that will benefit donors and the communities they care about for years to come.

About the Donor Education Program

The From Passion to Impact curriculum will be offered in facilitated cohort-style learning groups. It is a four-part series, designed for approximately one hour of in-program learning per week and an additional 30-90 minutes of reflective homework.

- Cohorts of approximately 8-15 individuals and couples
- 4-week educational program, delivered online and asynchronously
- Option of an in-person kickoff meeting

The curriculum will cover:

- Module One: An Introduction to the Philanthropic Sector
- Module Two: Identifying One's Values and Interests
- Module Three: Theories of Change and Exploring Causes
- Module Four: Putting the Learning to Practice - Drafting a Giving Plan

Reflective exercises are designed to help organize one's giving, spark new ideas, and take a holistic approach to philanthropy. Organizations hosting cohorts (i.e. community foundations) can add an optional in-person gathering at the beginning and/or end of a cohort to further build community.



Differentiation from Other Donor Education

Unlike other donor education programs, this program is explicitly offered in cohort structures so that an individual participant moves through the process with others. This is designed to generate dialogue, expose participants to new ideas or approaches, and help to solidify the giving commitments participants make through the process. The curriculum also blends approaches and content from academic research and practice.

For the field, after this donor education program, interviews with participants will offer insight into what kinds of impact this made for the donor (internal experiential impacts) and for their giving (external outcome impacts). This may include changes in giving allocation (percentages donated, types of recipient organizations, etc.), the amount overall donated as well as how it was donated (i.e. monthly giving, long-term commitments, etc.), or how the donors' experience of giving changed.

Goals

We hope to utilize these cohorts and the learning from them to better understand how donor education can unlock greater giving. Feedback from the participants will be used to refine the curriculum, particularly to expand or decrease content on areas that participants identify as most catalytic, as well as the success of the format.

About the Program Designers and Facilitators



Elizabeth Dale, Ph.D., is the Frey Foundation Chair for Family Philanthropy at the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University. Her work focuses on the role identity plays in giving and uncovering and addressing barriers to unleash greater giving.



Farrah Azizi, CAP, is a private philanthropy advisor for multigenerational families based in Beverly Hills, CA. Her work utilizes philanthropy as the vehicle for engagement and expanding meaning in giving.

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