

Growth of a Donor

Becoming an effective donor doesn't happen overnight. It is a process of growth, one that involves exploration, experimentation, and reflection. The foundation of this growth will always be your values, and the more you learn and develop, the more deeply rooted your philanthropy will be in those values.

At the California Community Foundation (CCF), with more than a century of experience, we have observed that as donors gain experience and self-knowledge, they follow a similar path of development and growth. This leads them to adjust their approach to giving in a recognizable pattern: Explorer, Experimenter, Champion, and Expert. We hope that in learning to recognize these stages, you will better be able to seek out the resources appropriate for your stage, align your approach with your own natural development, and navigate the transitions via actions steps designed to help you grow from one stage to the next.

This is not to suggest that there is only one way to grow in your giving, or a fixed ideal of what a donor should be. For some donors, the Explorer stage, with its emphasis on discovery and variety, is itself exciting and deeply fulfilling. For many, the joy of seeking out new arenas and organizations is just as thrilling as seeking out new lands and new realms was for the explorers of old. Other donors may bypass this stage entirely, as they start out with a more targeted and strategic set of priorities, and a hunger for depth over breadth.

Above all, being anywhere on this path of growth suggests that you already approach your philanthropy with a seriousness of purpose and a conscious desire to make an imprint and see results.

We hope this guide to growth will empower you to understand your current stage of development, to take control of your own growth, and to fulfill your own goals and your sense of what it means to be a donor. We hope you will allow us to be your partners in this growth and to help nurture your development.

I. Explorer

This is the first stage in which a donor begins to consciously shape their giving patterns to make a maximal impact in line with their values. As the name implies, this is where donors explore where they want (and don't want) to focus their time, money, research, and effort. The donor still casts a broad net, but with an attempt to curate and focus, to better understand the lay of the land, and to test what it feels and looks like to interact with each organization. Above all, this is a stage for constant interplay between taking action and reflecting on the effects of that action.

Attributes of the Explorer Stage

- Thinking about how your values connect to the impact you want to make
- Thinking about what issue areas and organizations feel like higher and lower priorities
- Reflecting on which philanthropic experiences have been the most rewarding or impactful
- Researching issue areas as a way to focus your philanthropy and make it more effective

Action Steps for the Explorer Stage

- Complete the CCF Values Questionnaire and Strategic Questionnaire
- Work with your relationship manager to schedule site visits with nonprofits to learn more about their work
- Attend a Donor Academy session
- Research strategic giving by reading Give Smart, and other publications
- Meet with CCF's grantmaking team in an area of your interest
- Create lists of "Will Pursue" and "Will Not Pursue" organizations and interest areas to focus interests
- Interact with each organization

II. Experimenter

This marks the stage where the donor has outlined at least a general strategy, or strategies, and has begun trying out ways to put strategy into action. As the name suggests, this is a stage of trial and error, and some unexpected outcomes should be welcomed as opportunities to learn and grow through experience.

What distinguishes this stage from the Explorer stage is the presence of a plan, albeit one that is flexible and open to change and reconsideration. The plan should be rooted in a clear understanding of how your contributions can create the results you hope to attain. Achieving a desired outcome through your philanthropy is a skill, and like any skill it must be honed through intentional practice and repetition.

Attributes of the Experimenter Stage

- Developing a vision of the impact you want to make
- Focusing on a discreet number of high-priority issue areas and organizations for maximum impact
- Seeking to create philanthropic experiences and impacts that deeply align with your values
- Seeking connections to philanthropic peers and mentors who approach giving from a similar perspective, or one you'd like to emulate in some fashion
- Thinking about the difference-making impact that your contributions can have in your targeted field and organizations

Action Steps for the Experimenter Stage

- Develop a Pilot Program for targeted giving to a select group of organizations
 - Set goals based on your values, your resources, and the impact you would like to make
 - Research programs with these goals in mind
 - Donate
 - Follow up with the programs to gauge the impacts of your donation on those you seek to help, and consider how this impact aligns with your own values
 - Analyze, assess, and adjust
- Network to identify and connect with peer donors, mentors, experts, and organizational leaders in your areas of issue focus and who share your values and strategic direction

III. Champion

This is the stage where the donor's research, reflection, and efforts to create a focused and effective impact through their giving come together in a clear strategic vision. The previously nascent theory of change has now coalesced into something more concrete, and donations are made with a conscious expectation of impact.

The result is that the donor has become more passionate and has identified those causes that are closest to the heart. The donor has become more knowledgeable, as breadth of knowledge has been replaced by depth, and the effort to learn and grow pays dividends in the form of hard-won wisdom.

Reaching this stage means that there is more consistency in the donor's approach to giving. This is a sign of dynamic equilibrium, not of stasis. There is still plenty of room for experimentation with grants and approach, but these experiments are now carefully constructed with specific goals in mind. There is a constant process of self-examination and adjustment, but these adjustments are now generally narrower and more precise.

Above all, this is a stage where the donor begins to feel the power of their many preceding decisions that have led to increased focus and impact in the chosen field. The investment of time and effort bears fruit in the form of both real-world results and the deep gratification of seeing one's values made manifest.

Attributes of the Champion Stage

- Having a strategic approach to how you expect to see your values manifest as real-world impact, and making donations in accordance with that approach
- Identifying a key number of organizations that you trust to support and work with to achieve your goals
- Focusing your philanthropic activities in the areas that you know are most rewarding and impactful
- Engaging in a consistent process of self-examination to assess whether your donations are making the maximum impact
- Seeking frequent, targeted adjustments to your giving to ensure maximum impact and alignment with the most up-to-date research in the field and the fruits of your own self-assessment
- Working with a trusted group of philanthropic peers, mentors, and experts to both improve your own efforts and to influence others in the field to achieve maximum impact in areas of shared values
- Seeking out diverse and challenging points of view to test your assumptions and ensure you continue to learn and grow

Action Steps for the Champion Stage

- Act as an ambassador for your issues and your favored organizations—share your work on social media; talk them up to friends, family, and fellow donors; help to organize events and conferences that highlight them
- Request a CCF report on your overall giving
- Create or join a formal or informal network of donors and experts to advance the cause of your chosen field or fields
- Look for ways you can productively engage with organizations you support, for example by joining the board or volunteering your time
- Create an informal advisory network where you can solicit feedback and bounce around ideas; be sure to include diverse and constructively critical voices who will challenge your assumptions and are willing to tell you challenging truths
- Continuously engage with people on the ground level of your field of interest, including on-the-ground workers and people who receive the services you support
- Measure results, compare them to expectations, analyze and adjust accordingly

IV. Expert

The ultimate stage of growth is one of complete integration—your deepest values are fully expressed in your philanthropic work, creating meaningful and intentional real-world impact. You fully understand how to leverage your donations to shape change to the maximum degree. You continue to learn in your field—learning must never stop—but you have also attained sufficient experience and expertise that you have yourself become a valuable resource for others and a mentor.

The combination of well-earned confidence and expertise makes you an ideal ambassador for your causes, recruiting new donors and allies, and helping to lead the thinking in your chosen field about how the work can evolve. Though you show due deference to the experts and professionals who labor in the field, you also have your own contributions to offer about how philanthropic and organizational structure can better support the work and push it forward.

Attributes of the Expert Stage

- Fully integrating your theory of change into every action you take to advance your philanthropic causes
- Continuously learning and improving in a never-ending process of evolution and growth
- Finding meaning and purpose through your focus on your core values and organizations
- Feeling deeply connected to your philanthropic work, bringing your full personality, talents, and passions to bear on their challenges
- Serving as a philanthropic mentor and leader in the spaces you occupy; seeking to share your knowledge and experience with other donors, and to nurture others along a similar path of growth
- Constantly challenging yourself to learn, improve, and test your assumptions with new ways of thinking to ensure that stagnation is impossible

Action Steps for the Expert Stage

- Embrace the role of full-time ambassador both for your causes and for the highest possibilities in the field of philanthropy
- Take an active role in the local and/or national philanthropic community as a mentor and thought leader
- Seek out less experienced donors to mentor and encourage on their own path of donor growth and self-actualization
- Create a plan for the full deployment of your philanthropic resources, whether during your lifetime or as part of your estate

Conclusion

A donor's path of growth is rich and rewarding in the long run, but in the moment it can sometimes be challenging and overwhelming. The progress that is so obvious from a distance may at any given time feel elusive or even non-existent. As in almost all important processes of growth, we need help and support along the way.

CCF is here at all stages of this important process to act as a partner, a sounding board, a teacher, and a supportive cheerleader. We have spent more than a century working with donors at every stage, and even some that, at first glance, appeared to be off the charts. We can offer the benefit of the long view and of a perspective enriched by experiences of the many donors who have come before you.

However you choose to approach your own development, we look forward to working with you in whatever way suits you best. We view this as a partnership for a lifetime, and we value every day of our relationship with you. We hope that it is as rewarding for you as it is for us.

Please feel free to contact your Relationship Manager or the Donor Relations Team at donorrelations@calfund.org if you have any questions. We are here to help.

    /calfund

