

#NEXTGENDONORS

Next Gen Major Donors Study
Interview Guide

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Note: Interviews were conducted as “guided conversations” rather than a scripted list of questions, using standard, open-ended, qualitative interviewing techniques. Therefore, no interview covered all of the following questions in the following order, but each interview incorporated most of the topics covered by these questions over the course of the conversation.

1. Introductory Comments

- This is a study of how you think about philanthropy, how you do it, how you learned it, and how all that might be similar or different from generations before. We want to talk to you about your own opinions, your own family, and your own giving – as well as get your reflections on philanthropy in general.
- These are open-ended questions, not a survey. The goal is for you to talk and us to listen – feel free to tell stories, reflect, wax philosophical, or ramble. These are sometimes “big” questions, so take time to reflect.
- Hand Out Information Sheet: This project is being conducted according to the human subjects’ requirements of Grand Valley State University. All your responses will be kept confidential. We will not tell others who said what, and only the researchers will see the transcripts. We will also maintain anonymity and not attribute quotes or comments in any publications. If we decide that it is too difficult to keep something anonymous, we will ask you first if we can attribute a particular statement.
- The interview will be recorded and transcribed. You can tell us to turn off the recorder at any time.
- Feel free to ask questions at any time, or ask us to clarify, or say you don’t want to answer the question.
- State your name and the date to start recording.

2. Personal Background & Intro to Family

- First, tell us where you live, what you do for a living, and the quick version of how you got here.
- Please tell us a bit about your family.
- Please tell us a bit about your giving, and your family's giving, as an introduction (we'll ask much more soon!).
Priorities? Values? Strategy? Causes? Your involvement?

3. Personal/Family Philanthropic Approach

Note: If the interviewee doesn't do much individual giving, ask questions about family giving first. Now we want to talk more about your giving, and how that compares to your family's giving.

a. Personal Giving

- Please give us some more detail on the various vehicles and causes you use.
- What are your giving priorities? How do you determine these? Have these changed over time?
- What are your philanthropic values? Have you thought much about this?
- Would you say you have an overarching strategy that guides your giving? If so, how would you describe that strategy? Describe how you fund, as well as what you fund.
- What is your highest ambition for your giving? What are the obstacles you see to being able to give in the ideal way you want to?
- Do you use any non-traditional tools for giving (e.g., giving circles/collaboratives, engaged/venture giving, MRIs and PRIs, etc.)?
- What kinds of questions do you ask potential grantees, or what info do you seek about them? What kind of relationship do you try to create with them?
- To what extent do you give from the head versus from the heart? Based on your philosophy and analysis versus your passion and emotion?

- What do you consider your biggest success in giving, either as an individual or through your family? What are you most proud of? Explain why.
- What was your biggest failure and why?
- What are the chief challenges that you confront in your giving? In your family's giving?
- Has your overall philosophy of philanthropy changed over time? How and why?

b. Family Giving

- How is your strategy similar to or different from the previous generations in your family? How do you do philanthropy similarly to or differently from the rest of your family?
- What do you want to preserve from past approaches? What do you consider old and inefficient?
- What is one thing about how your family does philanthropy that you strongly agree with or admire? Why?
- Do you have a different philosophy of giving from your parents and grandparents? Can you give an example?
- What does your family disagree about most in your philanthropic discussions? What has surprised you the most in conversations with your family about giving?
- When you talk to your friends about your family's giving, how do you describe it? What do you emphasize or de-emphasize? How would you describe it to a stranger?
- What do you consider to be your family's biggest success? What are you most proud of?
- What is the biggest failure?
- What are the challenges your family faces in giving? How have you overcome this, or how are you trying to?

c. Questions about Both

- What could you and your family be doing better in your philanthropy?
- What makes you happiest as a donor?

- What is most frustrating?
- How has your approach to philanthropy changed over time? What do you do differently now than when you started? Has your family approach changed? If so, how?
- Where do you see your own giving in 20 years? Where do you hope your family's giving is in 20 years, if different from your own?
- What is your family's philanthropic legacy? What do you want yours to be?

4. Learning Philanthropy

Next we want to discuss how you learned this approach to philanthropy.

- Think about the specific approach, strategies, and general opinions about philanthropy that you've described. Where do you think these came from? Where did you learn them?
- What did you learn specifically from each of these sources:
 - Family;
 - Friends or peers;
 - Advisors or consultants;
 - Philanthropy support groups;
 - Reading or other resources;
 - Training (mention specific trainings);
 - Life experiences;
 - Religious teaching, educational lessons, other sources?
- For each of these sources, talk about what you learned, and how (e.g., which family members taught you the most?).
- Which of these was the most important influence on you, and why?
- What stories did you grow up with that stuck with you and taught you lessons? Who did you hear these from?
- Think about your first experience with giving as part of your family. What is your earliest memory of it? What surprised you the most?

- Do you learn more about philanthropy from observing, from doing, or from teachings or readings?
- To whom do you talk about your philanthropy? Where do you go for advice?
- Whom do you trust in discussing your philanthropy or seeking help with it?
- Who are your philanthropic role models, and what did you learn from them? Where do you get inspiration for your giving?
- What would you teach your own children about philanthropy? What would you tell them “good philanthropy” means? How would you teach them?

5. Views of Philanthropy in General

Note: Only cover this if you have time and they seem to be able to address these more field-wide questions.

- What is philanthropy’s overall, ultimate purpose? What is its importance to society? What are its limitations? How extensively should we rely on philanthropy to get things done in society?
- What is the most exciting thing happening right now in the field of philanthropy? What is the most troubling?
- What are the major changes you see coming in family philanthropy, or philanthropy in general? What changes would you like to see?
- Think about the differences you have identified between your approach and your parents’ or grandparents’ approaches. What are the implications of these changes for the future of philanthropy and grantmaking, especially family philanthropy?

6. Wrap-Up

- Is there anything you want to add that we haven’t asked?
- We might be contacting you with additional questions. Also, please contact us with anything you think of that you want to add.