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## **IN-DEPTH NATIONAL CASE STUDY HIGHLIGHTS THAT THE FUTURE OF PHILANTHROPY—AND ITS IMPACT—DEPENDS ON NEXT GEN DONOR LEARNING**

*Decade of Greater Houston Community Foundation's programming serves as model for engaging rising major donors*

(HOUSTON, TX)—To evaluate their next-gen focused work and gather recommendations for the future, [Greater Houston Community Foundation](#) partnered with the [Dorothy A. Johnson Center for Philanthropy](#)—a university-based center based in Grand Rapids, Michigan that seeks to understand, strengthen, and advance philanthropy through applied research, professional education, and thought leadership—and [21/64](#)—a New York City-based nonprofit practice providing multigenerational advising, facilitation, and training for next generation engagement. Today, the organizations released a report of their findings intended to inform philanthropic institutions, professional advisors and foundations on tools to effectively engage the next generation of donors, which includes Gen X, Millennials, and Gen Z. Titled *Next Gen Donor Learning: Lessons for Effective Programs from Houston and the Field*, the report identifies core questions facing any next gen donor learning effort and offers practical guidance for tackling each question. It is primarily based on an in-depth case study that Johnson Center for Philanthropy and 21/64 conducted evaluating ten years of Gen X and Millennials donor engagement and learning at Greater Houston Community Foundation.

“It’s hard to overestimate just how vital these rising next gen donors will be to the future of philanthropy, and just how crucial it is that we do a better job across the country in helping them learn, engage, and thrive. Every cause and every community will benefit if these donors become the sort of informed and intentional philanthropic partners we all need them to be. That is our purpose with this report,” said report co-author Michael Moody, the Johnson Center’s Frey Foundation Chair for Family Philanthropy. “Anyone trying to walk with and assist next gen doors in their learning journeys will face complex questions, and this report is meant to help them address those questions.”

Based on an analysis of household wealth data, a 2014 report by the [Center on Wealth and Philanthropy at Boston College](#) estimated the largest wealth transfer in US history from 2007 to 2061, involving a shift of roughly \$59 trillion from one generation to the next. In that same period, lifetime giving to charity is estimated to be \$20.6 trillion. What's more, a [report from the Chronicle of Philanthropy](#) estimates that \$8.8 trillion will be passed down to Gen X and millennial Americans by 2027. The same report suggests that if just five percent of that total were captured by philanthropy, it would add up to \$441 billion. As such, the next generation of major donors is expected to be what Moody and Sharna Goldseker, in their book *Generation Impact*, call "the most significant philanthropists ever." These donors will profoundly shape civic, economic and political outcomes.

"An important part of our economy and our social fabric, philanthropy is a business, and we cannot afford to be complacent about the way it is practiced," said Kelly Hackett JD, CAP®, Managing Director of Family Office Services for Tectonic Advisors, Greater Houston Community Foundation Council Member, and alumna of the inaugural class of the Next Gen Donor Institute. "Case studies and impact evaluations like the one Greater Houston Community Foundation has done with the Johnson Center and 21/64 are critical for the field and for our community. As part of the next generation of donors myself, I can attest to the need for ongoing training as well as access to reliable information and advice."

One of the largest grant makers in Houston, Greater Houston Community Foundation has worked to build learning programs to engage and advise next gen donors over many years, and its suite of programs are some of the most comprehensive, intensive and respected in the country. Their programs include a Next Gen Donor Institute, Center for Family Philanthropy, various giving circles including one involving and led by youth, multigenerational family engagements, and more. These efforts focus not just on encouraging next gen donors and families to give, but also on enabling and guiding each donor's learning journey and supporting peer networks of next gen donors to learn, grow, and give together. To assess impacts of the Foundation's years of next-gen-focused work—including the impacts on the donors themselves, on their families, on the Foundation, and the ripple effects on individual nonprofits and the community—the Johnson Center and 21/64's intensive external evaluation included surveys of program alumni, dozens of in-depth interviews and a focus group, and other data.

“Greater Houston Community Foundation should be commended for allowing their story to be analyzed, but also shared for the good of the field,” commented co-author Robyn Schein, Senior Director of 21/64. “We are excited to work with the Foundation to lift up their model and share it with others. We know other funders and foundations around the country will benefit from and be inspired by this research.”

The experiences of the Foundation as well as examples from other institutions are used within the report to identify the challenges facing next gen donor development programs and to offer practical guidance and tools for addressing those challenges. The in-depth evaluation, which includes a list of core questions and good practice recommendations, is intended to be a resource for other community foundations, multigenerational donor families, advisors, peer networks, nonprofits, and other organizations supporting and engaging next gen donors.

“The Next Gen Donor programs and Center for Family Philanthropy have helped me and my family to maximize our impact with data, advising, community and peer connections, and opportunities to learn about effective solutions to difficult problems,” said Chris Weekley, President, David Weekley Homes, Greater Houston Community Foundation’s Governing Board Chair and Next Gen Donor Institute alum. “The tools for impact included in this report can and should be scaled to create more opportunities for this type of learning across the country.”

*Next Gen Donor Learning: Lessons for Effective Programs from Houston and the Field* was made possible through funding provided by Greater Houston Community Foundation, Frey Foundation, Kate and Richard Wolters Foundation, Max M. and Marjorie S. Fisher Foundation, F. Martin and Dorothy A. Johnson Family Fund, Raikes Foundation, and Arts, Equity, and Education Fund. Local funders of the case study include Ben S. Brown; Ann and Peter Fluor; Jerry C. Dearing Family Foundation; Lacey and Matt Goossen; Kelly Hackett and Molly Hackett LaFauci; Maureen and Jim Hackett; Elise E. and Russell C. Joseph; Mandy and William Kao; Jennifer and Chris Laporte; Barry, Rosalyn, and Leslie Margolis; Caren and Rob Sweetland; Chris Weekley; and Randa and K.C. Weiner. An expert on youth philanthropy who was also already familiar with the Foundation’s work, Dr. Andrea Hernandez Rodriguez of Growing Giving LLC, advised the assessment and helped gather data and interpret findings.

To view the full report, visit <https://ghcf.org/next-gen-case-study/>.

To learn more, sign up for a free webinar being offered through the Johnson Center on May 3rd from 1-2:30pm (eastern). The webinar will feature the report's authors as well as staff and a next gen donor from Houston. Register here: <https://johnsoncenter.org/event/workshop050322/>.

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### **ABOUT GREATER HOUSTON COMMUNITY FOUNDATION**

Since 1995, Greater Houston Community Foundation has helped Houston thrive by convening philanthropic resources and knowledge to drive philanthropy in our community, distributing over \$2 billion in grants over the past 26 years. Through various charitable vehicles, including donor advised funds, the Foundation partners with donors to meet their objectives by supporting grant making, including providing programming, advising and educational opportunities for donors to maximize their philanthropic impact.

Greater Houston Community Foundation is widely considered to be the go-to partner for high-profile philanthropic partnerships in the Greater Houston area, including major disaster relief initiatives, such as the Houston Harris County Winter Storm Relief Fund, the Greater Houston COVID-19 Recovery Fund, and, most notably, the Hurricane Harvey Relief Fund. The Foundation leads collaborations that support the wellbeing and vitality of Houston including Understanding Houston, a regional indicators partnership with the Kinder Institute for Urban Research that provides key data for philanthropists, business and nonprofit leaders, to drive decision-making in important areas of investment in Houston including economic opportunity, housing and education. For more information, visit [www.ghcf.org](http://www.ghcf.org).

### **ABOUT DOROTHY A. JOHNSON CENTER FOR PHILANTHROPY**

The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University was established in 1992 with support from the W.K. Kellogg Foundation. We put research to work with and for professionals across the country and the world. Through professional education offerings; research, evaluation, and consulting services; and bold thinking to advance the field, we support a philanthropic ecosystem defined by effective philanthropy, strong nonprofits, and informed community change. For more information, visit [johnsoncenter.org](http://johnsoncenter.org).

### **ABOUT 21/64**

Established in 2002, 21/64 is an independent 501c3 nonprofit practice providing multigenerational advising, facilitation and training for next generation engagement, especially within family philanthropy and other family enterprises. 21/64 specializes in serving families with funds, foundations or other family enterprises as well as wealth and philanthropy advisors—so that multiple generations can work, give and serve together more effectively. For more information, visit [www.2164.net](http://www.2164.net).