

**Donor Motivations  
of Women Philanthropists**

**By  
Vanessa C. Truett**

**Terminal Project  
Presented to the Department of Planning, Public Policy & Management  
of the University of Oregon  
In partial fulfillment of the requirements  
for the degree of  
Master of Public Administration  
July 2004**

“Donor Motivations of Women Philanthropists,” a terminal project prepared by Vanessa C. Truett in partial fulfillment of the requirements for the Master of Public Administration or Master of Community and Regional Planning degree in the Department of Planning, Public Policy and Management. This project has been approved and accepted by:

---

Name, Chair of the Committee

---

DATE

Committee:           Renee Irvin, PhD  
                              Jean Stockard, PhD

**For once I would like to be asked for my professional expertise, instead of just my checkbook. The nonprofit sector could learn a lot from the business world and it would make us professional donors feel much more at ease at giving to nonprofits if we knew they were widening their scope of knowledge. For example, why doesn't the ED take out a group of 3-5 area businesswomen for a working lunch, with genuine interest in utilizing the advice we put forth?**

**-Survey Respondent, June 2004**

---

---

*This project is dedicated to the strong, determined women in this study who have decided to take the needs of their communities into their own hands and create for themselves and their neighbors a better world. In addition, I would like to express my sincere gratitude to Susan Bulkeley Butler for introducing me to this topic and mentoring my growth in this project. Special thanks go to Dr. Renee Irvin for her meticulous editing, invaluable knowledge on philanthropy and mentoring, and to Dr. Jean Stockard for signing on to this project and for her constant encouragement and positive attitude during the year.*

---

“Donor Motivations of Women Philanthropists” examines the growing trend of women’s access to positions of influence, to increasing wealth, and to greater impact on the world of philanthropy.

In the five chapters of this terminal project for the UO Department of Planning, Public Policy and Management, these areas and issues are examined:

Chapter One: Proposed Research and Importance of Study

Chapter Two: Literature Review

Chapter Three: Methodology

Chapter Four: Study Results

Chapter Five: Summary and Recommendations

Central to this project is a set of personal interviews with 15 prominent Northwest women, to examine their predispositions towards and motivations for philanthropy.

This project concludes with a set of six recommendations for development professionals.

It also lists recommendations for future research—specifically more focus on donor motivations of various non-majority populations.

---

Women today are in more positions of power, with increasing amounts of wealth at their disposal than in earlier decades. Several trends contribute to their growing wealth.

Female college graduates have fared better with regard to earnings growth than their male counterparts. Earnings for women with college degrees have increased by 33.7 percent since 1979 on an inflation-adjusted basis, while those of male college graduates have risen by 19.9 percent (U.S. Department of Labor Bureau of Labor Statistics 2002).

More women are entering the workforce, more are attaining higher degrees and subsequently holding higher paying jobs, and many are inheriting more wealth.

As of 2000, women make up 51% of the United States population and have an expected survival rate that is 5 years higher than men (CDC Vital Statistics 2004). The upcoming transfer of wealth is expected to affect many women, partially because women tend to outlive men by an average of five years. At least \$41 trillion will pass from one generation to the next by 2044. It is estimated that 85-90% of those left in charge of this money will be women (Havens and Schervish 1999).

According to Johnson and Schreiber (2002) using IRS data, there were more than 2.5 million women top wealth holders in 1998. Together, their assets were approximately \$4.2 trillion. In addition, Johnson and Schreiber's research shows that men and women have very different tastes and styles when it comes to their investments. For example,

“Women’s portfolios contained a greater proportion of stock in public corporations than those of men” (Johnson and Schreiber, 2002, p.99).

These trends have allowed women to amass wealth, and increasingly they are looking for guidance in the charitable decision making process. This is evidenced by the growing number of donor circles, women’s foundations and gender specific education donor education campaigns being offered by Purdue University, Florida State, University of Wisconsin and workshops held through the Women’s Philanthropy Institute and area United Ways. We also are seeing an increase in financial planning services geared just for women.

With this large and growing potential base of giving, development officers are becoming interested in approaching women as a targeted group. Consequently there is a need to educate women donors about responsible philanthropy as the growing transfer of wealth promises to affect many women in the coming years.

This research examines some of the donor motivations of selected Northwest women philanthropists. By interviewing prominent women philanthropists in the area, we can glean some information, perhaps different from other single-gender studies that focus on donor motivation. With a survey using open-ended questions, women will have the opportunity to express themselves, using their own words and world view. This study will focus on giving during one’s lifetime. One part of the interview will be to discuss how these women learned their philanthropic behaviors, in order to explore possibilities to disseminate such information.

More than ever before, women are turning to inspired philanthropy to affect social change. As women amass more wealth, or as they save in order to live philanthropically, their ability to affect change and their environment increases. As Kaplan and Hayes suggest...”development professionals and others should pursue research specifically designed to study the giving behavior of women” (2002, p.19).

This project can be used to assist development effort in soliciting money from women as members of their own unique donor category. The information generated from this study can also assist in developing donor education for young women. Examining trends and attitudes of seasoned philanthropists can help to develop meaningful inspired philanthropy education for the upcoming generation of women. This can add to the growing body of knowledge around developing a single gender model and could be useful to development officers who are interested in using a single gender approach to solicitation.

As the population of women continues to increase and as wealth transfer affects more women, it is important to examine some of the research surrounding how women give and what appeals to them as donors, and then use this information continue to craft the single gender donor education framework. This is particularly true as this is a time period of financial struggles in the voluntary sector. Development professionals need to re-evaluate what tactics and funding streams to appeal to. Women donors seem like a good place to start. The ultimate goal of this exit project is to reveal some advice directly



from women donors on the cultivation of their support, as well as help to frame discussion around how we can pass on philanthropic behavior to a new generation using best practices.

Chapter Two is a literature review of themes and subjects common to women's philanthropy. It overviews a brief history of the history of women's philanthropy, donor motivations, passing on the philanthropic knowledge and an economic profile of women's giving.

### **HISTORY OF WOMEN'S PHILANTHROPY**

Examining women's approaches to philanthropy is not a new research arena. Women's work in the voluntary sphere was initially the only acceptable form of employment outside of the home, particularly for "ladies of leisure." Whether active in the church, or in the creation of self empowerment groups in Jewish tenement housing, women traditionally have turned with the power of their unity and cohesiveness to uplift and empower one another.

Female philanthropy has served and continues to serve as the means through which American women- once legally invisible and without the votes...have made a lasting imprint on social and institutional reforms, professionalization, legislation and even on the constitution itself (McCarthy, 1991 p.23).

From one of the first women's benevolent organizations in the U.S. originated in 1797 and called the Society for the Relief of Poor Widows with Small Children (Scott, 2000) to individuals through their faith who helped to uplift and support entire generations like St. Elizabeth Anne Seaton who established the first Sisters of Charity house in the early 19<sup>th</sup> century and Rebecca Gratz who founded The Jewish Female Association for the Relief of Women and Children of Reduced Circumstances in 1801 (Microsoft Encarta Encyclopedia, 1995).

Historically women have been philanthropic, but they have not been encouraged to give as generously as they might have (Angel, Rice and Stone, 1993, 114). Today, groups such as the Women's Fund of Southern Arizona and gender specific programs at alumni associations and United Ways are encouraging women to give and volunteer to fill a void that has not traditionally been met by dominant majority policies.

The next category of the literature review focuses on the motivations of donors.

Examining why people choose to give can give us insight not only on predicting behavior in order to tailor development practices, but to observe if there exists a difference between the sexes.

## **DONOR MOTIVATIONS**

For decades, researchers have looked at the psychology of motivation. Numerous projects have examined donor motivation (Schervish 1992, Mixer 1993, Gary and Kohner 2002,

Grace and Wendroff 2001, Cialdini 2001). Yet very few are gender-specific. I reviewed gender specific publications as well as general donor motivation theories. For purposes of my research I have created my own donor motivation categories and used some of previous researchers. From the initial literature review, I have identified six areas of donor motivation that most researchers include in their studies.

### *Direct Personal Experience*

The first identified type of motivation involves direct personal experience. This category asserts that women gave back to organizations that had once helped them. In the focus groups at Purdue University (2003), all of the 30 women, as former students, felt indebted to Purdue for the education it had provided them, and in turn through their career path, were able to accumulate a large amount of wealth. In reviewing Cialdini's The Science of Persuasion 2001, this category would mirror the reciprocity theme in which one will give after receiving something. In the Chronicle of Philanthropy's 2001 review of HNW's (a marketing solutions firm focusing on the high net worth community) survey, this motivation was noted by 57% of wealthy American women.

### *Financial Ability*

The second category of motivation involves financial ability. The existence of some disposable income would obviously have some bearing on one's ability to give; however, it does not explain Gary and Kohner's findings that conclude:

In 1998 contributing households with incomes of less than 10,000 gave away an average of 5.3 percent of their household incomes to charity, while those with incomes of \$100,000 or more gave less as a percentage of income- only 2.2 percent (2002 p.9).

Another researcher found somewhat conflicting information. First, excluding the very highest levels, families at every level of income and wealth are about equally generous (Havens and Schervish, 2001).

I assert that it is actually one's *perceived* ability to make a gift. Likewise, Paul Schervish through his evaluation of the study on Wealth and Philanthropy came up with eight variables that are determinants of charitable giving. One is availability of discretionary resources (1997).

HNW's results determined that 55% of all American women do not believe they have enough discretionary income to give. Not surprisingly, the bag-lady syndrome is a well-discussed phenomenon in single gender philanthropy methods. According to the Women's Funding Network, A Harris poll in 2000 found that women – particularly affluent women – needed more money than men did to feel financially secure about their futures. While 30 percent of the wealthy women surveyed said they would require more than \$50 million to feel "completely secure," only 4 percent of wealthy men did. Researchers call it the "bag lady syndrome" (Salmon, 2002). Fear of the future or the

"bag lady syndrome" is usually described by the following. As women age, they have an increasing fear that their money won't last and that they'll become destitute. As a result, most are reluctant to give away their assets before they die, even if they own substantial wealth.

Money insecurity crosses gender lines. "Households that have worries about money give 1/3 less than those that do not" (Mixer, 1993, p.8). This does not relate specifically to income, rather if one feels they have enough money. These feelings can be influenced by one's upbringing, community and many other factors.

### *Passion for the Cause*

The third category of motivation involves passion for the cause. Shaw and Taylor (1995) assert that women are committed to the causes they support. Within development circles it is said that women have to get involved to give. This suggests that we need to begin cultivating donors at a younger age and valuing their volunteerism. According to the Chronicle on Philanthropy's review of HNW Digital Wealth Pulse Survey, 86% of wealthy women give because they feel strongly about a cause. Similarly, Colgate University Development staff embarked upon a survey to learn about what motivated women donors. They found that volunteers make good donors. "Involvement leads to commitment and commitment leads to support" (Barlock and Joyce 2002).

### *Creating Social Change*

The fourth category of motivation involves the creation of social change. Women give to bring about social change (Shaw and Taylor 1992). Women, as members of a population traditionally marginalized and left out of policy making decisions, can circumvent these barriers to policy making through giving to social change causes.

Another finding reported by Shaw and Taylor was that *women give to create something*. Women are interested in doing something new, or getting a new program off the ground. This is evidenced through the history of women's philanthropy when women gave to fill a need that was not being met by dominant majority policy. Sublett (1993) mentions *women wanting to make a difference*. Much like the other results, women would like to affect the world around them through their own doing.

By the same token researchers Grace and Wendroff (2001), using years of research, interviews for marketing, and feasibility studies, revealed 10 prime values based motivations of donor-investors (male and female). One of the categories they discussed was to seed, encourage or complete change.

### *Building Community*

The fifth category of motivation involves social capital. As cited in Shaw and Taylor's study, women like to collaborate. This is applicable to the social validation point raised by Cialdini (2001). People want to do what others are doing. In this particular case we

can see this with the success of women's donor circles. In Shaw and Taylor's focus group findings, they assert that women seek a personal connection with the program. It is thought that women get involved with an organization and then give money. They develop a relationship either through volunteering or after having received services in the past.

Although researchers Shaw and Taylor repeatedly mention this as a female trait, I found it in several studies that examined both genders. It is seen in both Grace and Wendroff (2001) and in McClelland et al's discussion of the psychology of motivation where he discusses the affiliation and involvement with others in an organization as a powerful motivator (1953).

In addition, Shaw and Taylor's focus group findings reveal the importance of celebration to women. This creates a sense of community through shared experiences. This asserts that women are social beings who like the companionship of others and enjoy festivities. This was evident from my experiences at the University of Oregon and Purdue Alumni events, where single gender activities are a burgeoning flurry of activity and celebration with a lot of camaraderie and networking.

### *Learned Behavior*

The sixth category of motivation involves learned behavior. Sublett (1993) identifies seven categories on women's motivations for giving. One included *tradition*. This usually



arises from modeling behavior during formative years. In my family, every Christmas, invariably one of my presents was a gift made in my name to a charity that I had with volunteered at, or shown an interest in during the previous year. This also rang true for Schervish, examining both gender variables, who lists one of the determinants being “models and experiences from one’s youth” (Schervish 1998, p. 99).

The next section looks at how women learn and pass on their philanthropic knowledge. By looking at this category we can learn how women learned this knowledge as well as how they are planning on contributing to the education of the future generation. From there we can see where the gaps are, where the public sector will need to fill in.

## **PASSING THE TORCH**

### *Teaching Philanthropy*

Most women in Sublett’s study mentioned a desire to pass on knowledge to another generation. This was a reoccurring theme at a focus group sponsored by Purdue University. Women mentioned wanting to know how the current students were being educated on philanthropy, beyond participating in an annual telethon recruiting alumni dollars.

There are some institutions that have philanthropy as their mission, such as Sorosis organizations, many of which date back to the 18<sup>th</sup> century. However, these are a small

segment of a somewhat privileged population. Although these single gender organizations are a necessary function of community, I would attest that we need a wider reaching educational tool that allows women to self-actualize and realize their potential to practice inspired philanthropy, no matter their income level.

At the most grassroots level, children learn philanthropic behavior from those around them. Exposure to parental giving or volunteering is one of the most basic bases of knowledge that one could receive. Schervish (1993) asserts that one's parental example powerfully influences their capacity for financial responsibility and care for others.

## **WOMEN'S GIVING PATTERNS**

A brief review of women's economic giving trends can add to the base of knowledge of patterns and motivations for women's philanthropic behavior. According to a well-respected source on the economics of philanthropy, James Andreoni, there are "systematic sex differences when it comes to charitable giving." (Andreoni 2003, p.127). The three reviewed topics below are singles, marrieds and donor preferences.

### *Singles*

While just 13.9 percent of wealthy women were single, single women make up 20.5 percent of the adult female population. Widowed women make up 28.5 percent of the female top wealth holders, which is significantly more than US widowed women percentages overall in 1998 (Johnson and Schreiber 1999). Single women were more

generous than single men, with an average annual contribution of \$202 more. (Chin, Mesch, Rooney, Steinberg, p.6).

### *Marrieds*

In 1998, married women made up 47.0 percent of all female top wealth holders, while 57.9 percent of all adult women in the US were married (Schreiber, Johnson, 1999).

The average household gives two percent of income to charity (Gary and Kohner, 2003).

HNW's wealth survey estimated that the average high net worth household gives away between 6-7% of their income.

Andreoni found that "Jointly deciding couples look more like the husband's (choices)" (2003, p.122). This continues even after the husband's death, with many attorneys and development professionals reminding the widow "this is how your husband always gave." This inhibits the woman from developing her own sense of philanthropy.

### *Donor Preferences*

Within development circles it is discussed that women traditionally do not give as large of gifts, rather spreading them out over a variety of organizations. Andreoni had similar findings. "Women tend to give to a greater variety of charitable activities, giving less to each." (Andreoni, 2003, p.127)

In regards to the types of charitable organizations that wealthy women choose to give to, according to the Greene's' review on HNW's survey in the Chronicle of Philanthropy, 59% of wealthy women gave to health organizations, 54% gave to educational institutions, 52% gave to children, 46% gave to homeless or low income and 45% gave to Religious (Greene, Chronicle of Philanthropy, p.2). Among all women, religious giving was number one. Andreoni has similar findings, especially among married women. "Married women especially favor health and education, while husbands are more generous than wives only within the sphere of adult recreation" (Andreoni, 2003, p.127).

Likewise, two years later in another study, educational institutions, health-related charities and religious or faith-based organizations top the list of charitable causes for high-net worth men (HNW Wealth and Values Survey 2003). For wealthy women, the list of top charitable causes includes health-related charities, educational institutions and children and youth services. Compared with their male counterparts, wealthy women are more likely than men to give to women's organizations, animal rights and environmental groups and disability charities. Men are more likely to give to political or advocacy organizations and arts or cultural charities (HNW Wealth and Values Survey 2003).

Examining this research we can begin to examine whether research results mirror the aforementioned. Are there differences between men and women's giving? How are women donors learning their behavior, and what inspired them to give? What can we learn about their behavior that will allow for a stronger donor pool? How can development professionals ensure that their women donor's needs are being met?

## **METHODOLOGY**

This chapter reviews the study design, data collection methods and description of the sample used for the study.

### *STUDY DESIGN*

The research design for this product began in an ethnographic model, with my spending over a year in the development field, establishing contacts, and attending conferences on women in philanthropy. Making these connections enabled the grounded theory portion of my research to come to fruition.

The interview research consisted of qualitative, exploratory, semi - structured face-to-face interviews with 15 women philanthropists, primarily from the Pacific Northwest.

This study was exploratory qualitative research with purposively selected women philanthropists in order to gain an in-depth understanding of motivations for women's giving. These women were selected based on their history of giving in the community, their occupation and involvement in "women in philanthropy" projects.

Over the course of a year I researched local women philanthropists, and arranged to meet them either at their home or place of business to conduct the interview. The interviews

were audio-taped, and transcripts were prepared by the researcher and reviewed by an independent party.

Background and formative information was obtained through observation and discussion with development professionals.

Analysis of data in this research project involved summarizing the mass of data collected and presenting the results in a way that communicated its most salient features. I began by labeling and coding every item of information so I could recognize similarities and differences between the different items. Brief outlines of methods are listed below:

The initial step was to get familiar with the data through review, reading, listening and observation. Following the interviews, I transcribed the tape-recorded session. Next I organized and indexed data for easy retrieval and identification. Following this I coded sensitive data, identified themes and coded once again.

### *DEMOGRAPHICS*

This study constituted of a sample of fifteen women. All were residents of the Pacific Northwest except for one, who currently lives in the Southeast. Out of the fifteen women, 13 were Caucasian, including two women of Jewish heritage, one African American, One Latina, and One Asian. Three women were in their forties, five in their fifties, five in their sixties, in her seventies and one in her eighties. Out of these women, two were

Lesbians in domestic partner relationships, three were single and ten were married to men.

This exploratory study examined some of the motivational factors that ensure women's philanthropy. These interviews examined and identified motivations for giving and how one learns and passes on this information. Unique data from prominent Northwest women will add to the local areas information on donor motivation, as well as help to frame discussion around how we can pass on philanthropic behavior to a new generation.

Spending the past year visiting different women's initiatives in the US, participating in women's giving campaigns and talking with women's foundation officers helped to frame a set of questions that I would pose to a select group of women philanthropists. I have gained a deeper understanding about the meaning of philanthropy as well as how deeply passionate women are about the issues to which they choose to contribute. Not only were the women involved and deeply moved by the causes, they were extremely knowledgeable of the organization they supported and their mission in the community. After completing a literature review on donor motivations of philanthropists as well as basic giving trends by gender, I formulated a series of questions that encompassed some parts of other researchers' findings to see how similar the Pacific Northwest group of women were to women who have been the focus of national studies. I chose these questions based on suggestions of development professionals, existing literature that listed the questions as further points to study, and philanthropists themselves.

The results of the interviews are as follows:

### **PROFILE OF GIVING**

The initial question asked women what type of organization they funded. In this category, all of the women gave to more than one cause, so the numbers are not congruent with the sample size. The top-ranking category for this question was a tie between Religious organizations and Higher Education, with both having eight positive answers. Following



closely behind were Children and Human Services with seven, which included United Way giving. Next were the Arts, Public Radio with six and Social Change with three responses. The bottom two mentioned were Animals with two and Trade organizations with one.

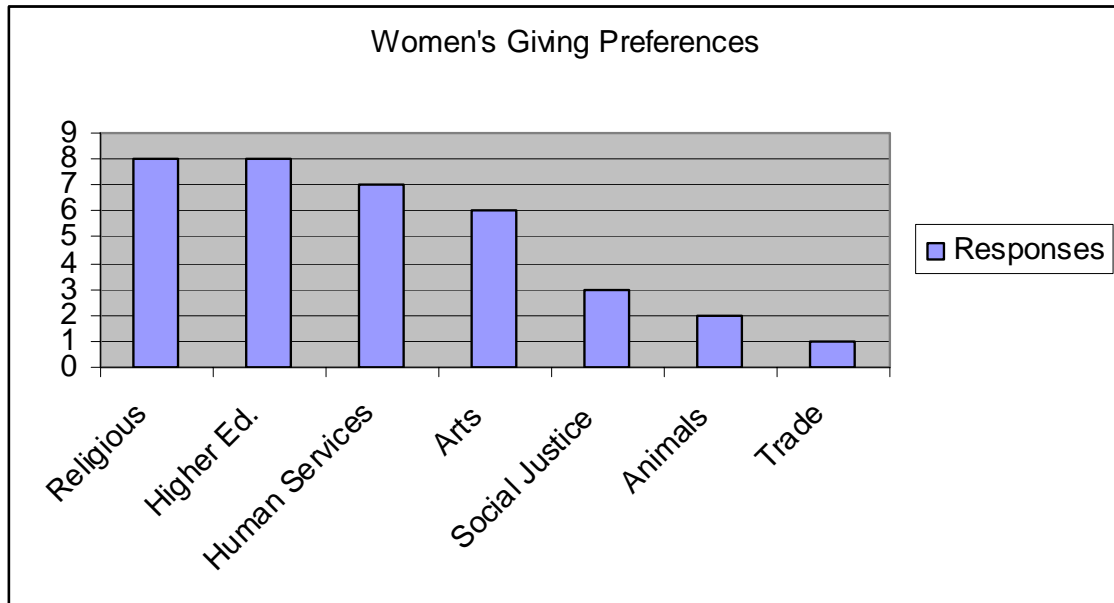


Figure 1

The interesting part about religious support was that it was not the first category the women thought of when asked the initial question. When it came to giving in the church many stated that it was an automatic, off- the- top part of their monthly budget. Some Protestants mentioned tithing, and one Jewish woman said it ran much deeper than that.

It is not quite as extreme of a concept as my friend in the Presbyterian Church who tithed 10 % of her gross income. It's not that rigid, but it depends on someone's sense of obligation. The Hebrew word for charity is

identical to the word for righteousness. So it's an obligation to do charity at whatever level you can, even if it is only a penny.

Results of the study regarding giving to higher education mirrored national study results. The Chronicle of Philanthropy, in its 2001 article reporting on HNW Wealth Survey, lists educational institutions as the number two percentage of giving for women. The women I spoke to invariably supported higher education as one of their first priorities. Although I knew some were University donors when they were approached, other women divulged that they too supported the local University, or their alma mater at a substantial level.

This category is not too surprising when we remember the category mentioned in the literature review, Direct Personal Experience. Women who have benefited from a positive education experience, perhaps even increasing their income potential due to this education, would likely feel obligated to contribute.

A surprise was the lack of responses regarding giving to health organizations. Nationally, it is the highest category that women contribute to, yet only two women in this study mentioned it in their response. It is feasible that in the Northwest, giving to health related organizations isn't a priority. Another possibility is that because these questions were open-ended, women were able to name categories as they wished. Perhaps some included health in the human service category. Doing this question again, I would probably offer six or seven choices, using categories that mirrored national studies.

Locally, religious giving was higher than national averages. Out of the top five, religious giving ranked fourth nationwide, and tied for first with this sample. This is interesting considering that according to Glenmary Research Center's report: Religious Congregations & Membership: 2000, Oregon has the lowest ranking church attendance and religious affiliation in the nation, with 31.3 percent of its population claiming some religious affiliation. The national average is 50.2 percent. Even more surprising are the four lowest metro areas, Medford, Oregon (22%), Corvallis, Oregon (23%), Redding, Calif. (24%), and Eugene, Ore. (24%). Out of the remaining categories, most were similar enough to previous studies, not to warrant much surprise, with the exception of the health category.

## **MOTIVATIONS FOR GIVING**

The second question asked if the reputation of the nonprofit affected their giving. This question was included in anticipation that women would add to the answer and provide some insight to nonprofits on what they were looking for in organizations.

### *Reputation of the Nonprofit*

Every participant except one responded that the reputation of a nonprofit is a vital factor when it came to their motivations for giving. The only negative response was qualified by the comment that "it's more about the mission and what they are trying to accomplish."

Out of this question, several themes emerged. The highest ranking qualifier was four respondents mentioning the history of use of funds. One Caucasian businesswoman in her fifties remarked that:

We want to be assured that our funds are going to an organization that has some history of getting the kinds of outcomes and contributions that we value. That they are well enough established to be able to manage their funds and sustain their organization over an amount of time. I rarely give to an organization that is brand new or has a struggling balance sheet.

A differing opinion from another respondent actually enjoyed coming in “to save the day”

I feel like I am truly making a difference when there is a sincere plea for assistance. When I know that my gift can sustain the organization for another year, I feel like I am doing something special. I am more likely to give when I know the organization is going through a tough time.

Another mentioned the charitable giving choices were in fact a reflection of one’s reputation. She likened it to the old adage, “guilty by association.”

When probed further on what is an important piece of the organization’s reputation, the respondents listed the following descriptors: management expertise, overall mission, and the effort of the staff and board.

## INVOLVEMENT

The third question asked the women what their type of involvement in the organizations’ that they fund. This was included due to the literature review’s findings that “Involvement leads to commitment and commitment leads to support” (Barlock and Joyce 2002).

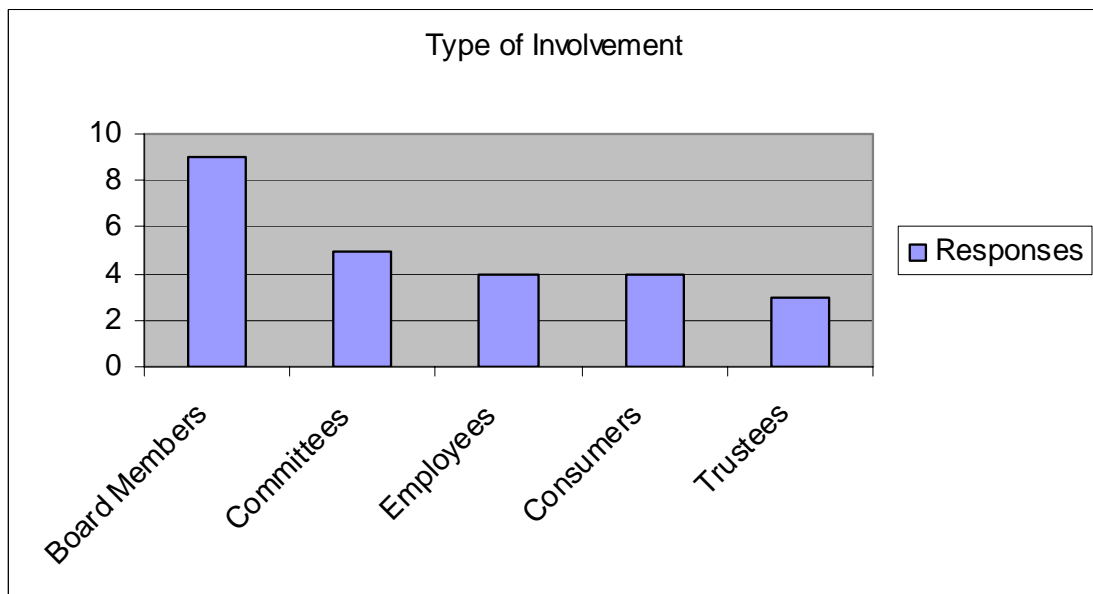


Figure 2

All of the participants considered themselves involved in some aspects of most of the organizations that they funded. Nine were either members of the board, or an advisory board. In addition, or in lieu of board membership, five were also on committees. Four were a current or past employee of the organization. Three of the highest-level donors were trustees, and four mentioned being consumers of the service. This was similar to Grace and Wendroff's point that:

Donors of transformational gifts not only wish to support organizations that are addressing issues important to them, they often want to become deeply engaged through board membership or other involvement (2001, p.64).

One interviewee preferred to take a more passive role. "Occasionally I am a board member, but I have found that I do better supporting organizations where I am not that tightly into day to day operations, you end up getting disamored in petty politics."

Another donor liked to be very involved, and in her social circles most women did as well.

Women want to be involved, and then they will give. Men give so they don't have to be involved. I like to help craft my gift. Like when I created an endowed chair at a University, I defined who I wanted preference given

to and the next chair I am going to be involved in the recruiting of the person.

## **RELIGIOUS BACKGROUND**

The fourth question asked respondents if they had any religious affiliation, and if that influenced their giving. Eleven out of the fifteen respondents claimed to have some religious affiliation. Out of the remainder, two were raised with religion, but no longer practice. The other respondents gave to a church, but only out of respect for their parents' philanthropic wishes.

The church, as discussed before, seems to have had a driving force in modeling philanthropic behavior and educating young members on charitable causes. As mentioned in the Bible,

For if you give, you will get! Your gift will return to you in full and overflowing measure, pressed down, shaken together to make room for more, and running over. Whatever measure you use to give -- large or small -- will be used to measure what is given back to you." (Luke 6:38)

One executive in local nonprofit claims that the model of tithing has shaped her philanthropy: "Giving begets giving." Among women who did not contribute to religious causes, their giving was much more focused. This corroborates Giving USA 2002's

finding that household that participates in religious services give, on average, about twice as much as other households.

## **PASSING THE TORCH**

The fifth question asked the women how they learned their philanthropic behavior. A probe followed offering several options. (Family, mentor, church, work, United Way, etc...)

### *Family*

Overwhelmingly, 12 interviewees mentioned family as the formative force behind their philanthropic behavior. Almost all the respondents mentioned that their families either gave money or time or expertise- -not always obviously, but in a way that they eventually realized as charitable behavior.

We saw our grandparents giving, reaching out, taking people into their homes. I remember the hobo who would get off the train in our town and come to the big house for work and something to eat. He came for years. Everybody was willing to help the next person if they needed it, no matter what it was.



Another aspect of family participation was when families were in need of charitable services. Some respondents grew up in a household that needed to utilize such services and now are endeared and grateful to them. Often it could have been several generations before, with one respondent crediting Jewish tenement projects for shaping the education of her grandparents. Another, raised in a home with alcoholic parents, received a lot of assistance from the local library which provided shelter and escape from a chaotic home life. She still gives regularly to that library.

### *Professional Life*

The next most frequent answer with 5 responses was tied to professional experiences. Many respondents mentioned learning to give through their professional lives. “Part of my learning curve was working in the development field. I wouldn’t have gained such an appreciation of it, nor would I have the passion for it if it wasn’t for my work.”

Again one learned about it from her spouse, yet it made a difference nonetheless. “If my husband didn’t work in the field, I wouldn’t understand its importance, I certainly wouldn’t give to the University, as I would think it is a state organization and doesn’t need any help.”

According to Dan Fenn, philanthropic work has become a career expectation for managers seeking to advance within corporations (1971). This is also evidenced in the

next category, mentoring, where often women executives learned appropriate behavior from other high level players.

### *Mentors*

One respondent, a president of a family business, disclosed how important the organized mentoring was to her.

When I first joined, I was the only Oregon female president and one of 14 women in the US. in the Young President's Organization, (a well known worldwide exclusive peer network that connects Young Presidents in a forum to exchange ideas, pursue learning and share strategies to achieve personal and professional growth and success). I had to learn what others did. I had good role models.

Another had someone specific in mind.

My mentor was Cheryl Altinkemer at Purdue; she led me to the Women's Initiative and I had the benefit of hearing all the national experts in the field over the past 10 years. This has made the most impact and helped me formalize my giving strategy.

## *Religious Background*

As mentioned before, Church and Temple were starting points for many to learn about philanthropy, whether through scripture or direct action of the synagogue or congregation.

Most women in my generation started our giving through the church. I think that's where most people get their start. I remember as a youth at Saturday session they'd read a story and we'd follow it up with a collection and put dimes and nickels and pennies in the basket and the money would go to local causes. In the Midwest, the church was the provider to the homeless and hungry.

## **INTERACTION WITH EXECUTIVE MANAGEMENT**

The sixth question asked what attributes do you look for in the executive management of the organizations you fund? It is often interaction with executive management that can make or break a gift. When I asked donors what attributes they looked for in executive staff of the organizations that they fund, vision was the most popular answer with five responses. Good communication, outcomes measurement and financial skills also ranked in highly with four each. Along the same lines, competence, responsibility, and professionalism each had three responses and positive attitude had two responses.

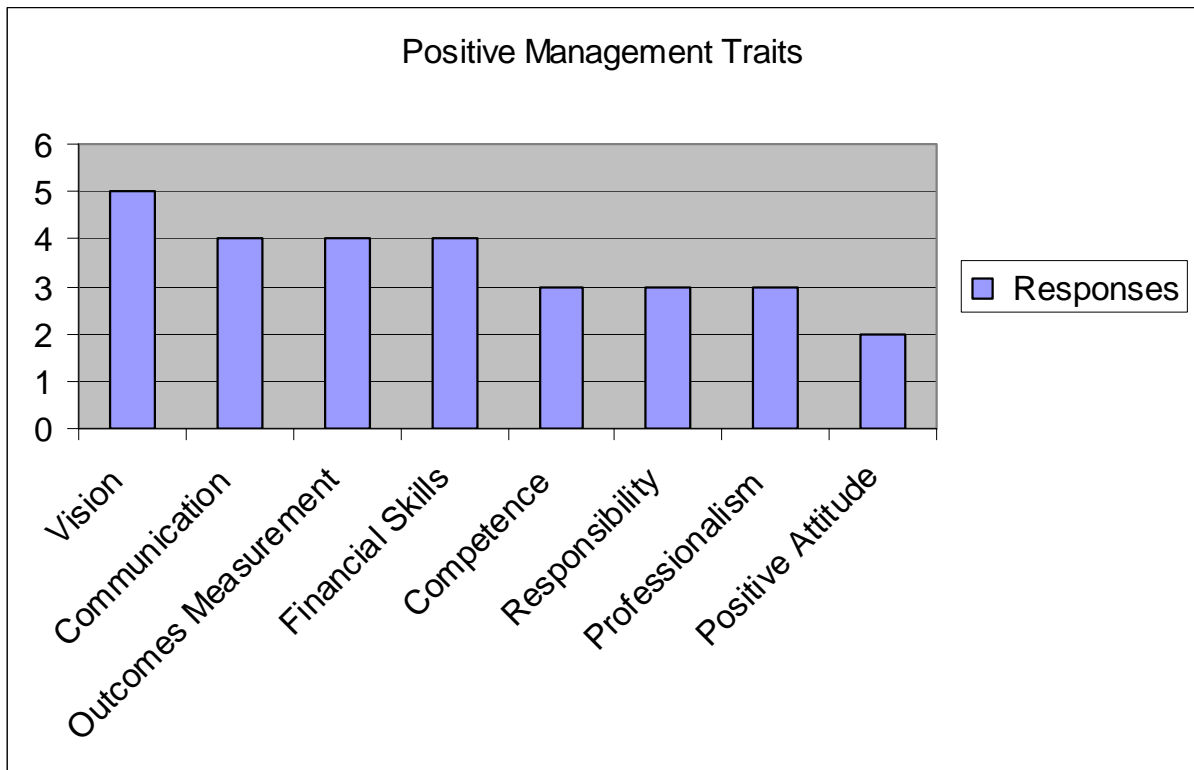


Figure 3

Too much independence in an Executive Director could be construed as a negative trait.

These people must be extremely organized, have impeccable integrity and people skills; they must realize they work for a board of directors and carry out their policies -- not be headstrong and do what they want on their own.

Specific skills with a certain level of competence play a role as well. “They must have more than minimal skills in donor relations and recruitment. We have not funded some organizations because they just didn’t get it.”

A professional who has his or her act together on many fronts is important. It is important that the nonprofit executive be well - educated and able to put others at ease.

For me, I look for a welcoming, inclusive spirit; I like a neutral safe zone.

Positive, upbeat, not whiny. Their reputations certainly factor into it.

Professionalism, education and reasonable business sense.

## **NURTURING THE DONOR**

In the seventh question I asked respondents, “Once you have made the decision to give, how is it nurtured by the organization?” This question initially evoked the most negative responses. In fact, one respondent remarked “Very Badly!!” another “not too much” and yet another, “I hate the tote bags...when I make a modest gift and get something framed I have to think- how much money did they spend on that? Is this how they are using their operating expenses?” Three other respondents simply said, “I do not like group get-togethers.” That particular answer goes against what we have heard and read about women donors liking the social aspect of giving.

One high - profile donor had some advice for the development and executive staff when it comes to working with women donors.

For once I would like to be asked for my professional expertise, instead of just my checkbook. The nonprofit sector could learn a lot from the business world and it would make us professional donors feel much more at ease at giving to nonprofits if we knew they were widening their scope of knowledge. For example, why doesn't the ED take out a group of 3-5 area businesswomen for a working lunch, with genuine interest in utilizing the advice we put forth?

Some tactics that two women really appreciated were Food For Lane County's Un-Dinner Menu. One elaborated:

It was really clever where they sent you a tea bag and a menu of the dinner they weren't having. You stay home, have a cup and send in your donation. So we don't have to go through this ridiculous process with all this staff time and volunteer time to create an event... I don't go to those things, I don't have the time.

A woman in her 70's who established a local grassroots social change foundation, was duly impressed with the local United Way.

United Way does a good job of recognizing and providing a forum for major donors. It's always exciting for me to see all the enthusiasm and passion in one room. The wealthy often get a bad rap in the social change arena and it's good too see them doing good things in the community.

Some tactics that four area women appreciated were direct meetings with the executive director, genuine communication, positive pleas, not fatalistic tales and simply being asked. One successful business president was amazed at the amount of fund recipients who do not come back and ask again, or cease communication after one year of funding.

## **THE NEXT GENERATION**

In the seventh question, interviewees were asked how they planned to pass on their knowledge about giving. From my observation, this question had the longest wait time, and seven respondents mentioned never considering this before. In fact one respondent said: "Vanessa, I am too young to be thinking about this!!"

However, some women who were more involved and educated regarding philanthropic motivations had thought this out before:

I think the best way is to answer with an example. Allow publicity of our gifts and involvement and then mentor rising women donors. Agree to

share in our journey and how we arrived at our strategy. I love seeing women grow as I have done over the past ten years.

Overwhelmingly, six women chose to discuss the importance of not giving anonymously as a vehicle for spreading the gospel of giving. “Don’t hide your light in a basket,” modeling this behavior is only apparent when you let your name be known.

It is interesting considering the large amount of Christian respondents that the Bible directly states:

Be careful not to do your 'acts of righteousness' before men, to be seen by them. If you do, you will have no reward from your Father in heaven. So when you give to the needy, do not announce it with trumpets, as the hypocrites do in the synagogues and on the streets, to be honored by men. I tell you the truth; they have received their reward in full (Matthew 6:1-2).

Interestingly, only four respondents mentioned working with their children to develop philanthropic behavior. This result is intriguing, considering that eleven of the fifteen respondents clearly stated it was their family’s influence that molded their giving patterns. Out of the few that discussed having a plan of action for working with their children, one had established a fund that each quarter has money deposited into in order for the youth to make charitable contributions. Another is being primed to run a family



foundation as a future career. Simpler tasks are incorporated into everyday life for others; “we volunteer together on a monthly basis and make goodwill offerings”, and “my daughter has always received gifts such as donations in her name to the nonprofit she was interested in, or volunteering at.”

Another has a warning with commentary all too familiar to many mothers: “Being open with children about giving is about the only thing you can do, keeping in mind that they can rebel as well as copy.”

### **ADDITIONAL FEEDBACK**

The rest of the interview was an open-ended opportunity for respondents to discuss any additional commentary on the topic of motivations for giving and women’s philanthropy in general.

Building community capital is a big part of one women’s view on philanthropy:

Philanthropy is one of those things that if you feel strongly about you community or the nation, or however you define your community, and you have the means to make things happen - - why not do it now and be part of making the world a better place. You can sit on it and let someone else give it away for you after you are gone, or give it away now and make what you want to happen happen.

Similarly, several others mentioned community. “I think for people who have developed a sense of community, it’s awfully hard not to develop a sense of giving back.”

“This is my way of offering gratitude for the blessings in my own life. It was not too long ago that my grandparents were desperately poor, so I don’t feel that separate from the homeless and hungry community.”

Other respondents took this opportunity to offer their advice for the cultivation of women donors. “Organizations are not doing a good job of keeping in touch with those people they have helped. They are missing a large base of potential donors.”

Organizations also should not overlook small donations:

Organizations often forget about the younger women who are just starting to give. I can’t tell you how many groups I gave to, where I received no thank you – or even a newsletter from. My gift was too small. Too bad, because now I give away 500% times the amount to other organizations.

One woman expressed her concern for the future of philanthropy.

Today’s parents are so wrapped in material things, always thinking they don’t have enough money, they need the latest DVD, MP3 or SUV. I am afraid they are not teaching their children about giving like our parents

did. They are too preoccupied with keeping up with the Joneses. How will this generation learn about giving if we don't do it?

The findings of this research were important both for the researcher as well as the participants. Many respondents mentioned not having thought of some of these topics before; and although they had given substantial amounts of money, hadn't really put much thought into creating a plan of action for their giving. Another part that had been missing, but important to the women, was figuring out a way to pass on knowledge about philanthropic behavior. This is further evidence to development professionals and financial planners that women need assistance in planning their giving as well as additional education to ensure their ability to inform the next generation.

Chapter five discusses recommendations for development professionals in light of the research findings of Pacific Northwest women donors. As we begin to see the effects of the wealth transfer, recognizing that this will affect more women, as well as women earning more degrees and earning higher level salaries, professionals in the field of development would be wise to investigate the motivations behind women's giving. It is time that development professionals re-evaluate which tactics to use and funding streams to appeal to. From these discussions I have come up with six recommendations for the development field.

1. Work to build genuine relationships with prominent women, utilizing their professional expertise and personal networks to ensure long - term sustainability of your organization. Make sure you consult with them for items other than their financial contributions.

2. Exhibit a frugal attitude when it comes to thanking donors and volunteers. Women like acknowledgement, but not to the extent that it makes them question your operational budget. Utilize your relationships with women donors to find out what kind of recognition they are interested in receiving. By the same token, don't assume all women are the same. Use the same amount of research that you put into prospecting into finding out what each individual expects and desires. Too

much recognition, or not enough, can make or break a donor, and word travels quickly.

3. Begin your cultivation earlier. Although a one-year benefit cost analysis may look grim for taking the time to work with young or new donors, it is this initial impression that will make or break a future major donor. As mentioned earlier in the results section, several respondents offered their advice for the cultivation of women donors. First, organizations need to keep in touch with the people they have helped. Second, organizations should not overlook smaller donations.
  
4. Create donor education and philanthropy programs in schools. If children are not getting this education through church or parents any longer, schools (especially universities—it's in their best interest) should step up to the plate. We were shown by previous researchers, as well as data in this sample that family is the preeminent formative force when it comes to philanthropic education. However, over 3/4 of the women I spoke with didn't have plans for including their children, nor were their children interested in this process. Other respondents mentioned not seeing others educating their children on these matters or the children choosing materialism over philanthropy. Additional education in the schools could possibly present a stronger front, or introduce it to people who had not previously thought of it as an option. Educating women about financial matters can only be positive when we look at their attitudes about money and finances, even when they possess a great deal of it.

5. Involve women in the gift planning process. Sixty Seven percent of women nationwide want to see the tangible results of their giving (HNW, 2001). In my sample, more than half list being involved in more ways than just monetarily as being very important.
  
6. Don't assume that all women are interested in social events. In the past many development professionals thought women who aren't willing to make calls or solicit others for donations would do well organizing events. From this sample we saw that not only do women not have the time to organize, many don't feel like they have the time to attend. Brainstorm other ways to get women involved. According to HNW's survey only 23% of women donors enjoy the social functions associated with giving to charities and try to attend them regularly.

The experience of observing and interviewing prominent women donors has given me a glimpse of the lives of a committed, passionate and proactive group of women who are working tremendously hard to affect the world around them. In continuing the innovative and groundbreaking movement that began over two centuries ago by concerned and motivated women, these women are affecting change and creating the world we want to be a part of. Professionals have the important task of ensuring that these women's dreams and desires are fulfilled while educating them on viable options that will assist both the woman and the organization.

## CONCLUSION

---

As the public sector continues to fail local communities, and gender specific needs are not being met by health policies, we as women can pick up the slack. As women continue to attain higher level positions and higher educations, we can chart our course and impact policy decisions, even if it means personally funding the expense. Beyond this, an inspired plan of action when it comes to charitable giving has given many women a sense of power, strength and control over their surroundings.

With this research, we have a unique opportunity to look at philanthropy as a lifestyle. By examining some of the motivations and thought patterns behind prominent women philanthropists we can begin to adjust some of our solicitation methods. In addition, we owe it to the upcoming generation to discover ways to pass on this way of life, through education, through modeling and by working with our children to develop their charitable behavior.

Future recommendations include research that focuses on the differences between Caucasian and non-white giving priorities and attitudes about Philanthropy. During this study I was only able to interview four women of color, out of the fifteen participants. Although indicative of the local population demographics, it certainly wasn't enough to frame the findings as multicultural. According to the US Department of Commerce, after 2050 the Minority population most likely will surpass the non-Minority population, so this could be the next important frontier to explore.

## BIBLIOGRAPHY

---

Andreoni, James, Eleanor Brown and Isaac Rischall. (2003). Charitable Giving by Married Couples: Who Decides and Why Does it Matter? *Journal of Human Resources*. 38(1), 111-133.

Angel, Judith C. and Susan F Rice. (1993). Women, Money and Political Clout In A.J. von Schelgell & J.M Fisher (Eds.), *New directions for philanthropic fundraising: Women as donors, women as philanthropists*. (107-115). San Francisco: Josey Bass.

Barlock, Tracy and Ronald Joyce. (2002). Starting a new program at your institution. In A.J. von Schelgell & J.M Fisher (Eds.), *New directions for philanthropic fundraising: Women as donors, women as philanthropists* (73-83). San Francisco: Josey Bass

Clary, E. Gil, Mark Snyder and Arthur A. Stukas. (1996). Volunteers' Motivations: Findings from a National Survey. *Nonprofit and Voluntary Sector Quarterly*. Vol. 25, Issue 4: pp. 485-505. Sage Publications, Inc.

Center for Disease Control (CDC) Vital Statistics 2004, retrieved on 4/02/04 from website <http://www.cdc.gov/nchs/> .



Chiappori, Pierre-Andre (1997). "Collective" Models of Household Behavior: The Sharing Rule Approach” in *Intrahousehold resource allocation in developing countries: Models, methods, and policy*, pp. 39-52, Johns Hopkins University Press.

Cialdini, R. B. (2001, February). The science of persuasion. *Scientific American*, 284, 76-81.

Fenn, Dan H., Jr (1971). Executives and Community Volunteers. *Harvard Business Review* 49, no. 2:4ff as referenced in Melissa Middleton’s “Nonprofit Boards of Directors: Beyond the Governance Function in The Nonprofit Sector: A Research Handbook, Ed. By Walter Powell, Yale University Press, New Haven CT. p.142.

Ferguson- Patton, K. (1993). Women talking to Women about giving: Creating incentives, avoiding resistance. In A.J. von Schelgell & J.M Fisher (Eds.), *New directions for philanthropic fundraising: Women as donors, women as philanthropists* (5-20). San Francisco: Josey Bass.

Tracy Gary and Melissa Kohner (2002). Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan. San Francisco: Wiley and Sons, Second Edition.

Giving USA 2002, American Association of Fund-Raising Counsel. New York.

Glenmary research center's report: Religious Congregations & Membership: 2000.

Retrieved 8/05/04 from website: [http://www.glenmary.org/grc/RCMS\\_2000/release.htm](http://www.glenmary.org/grc/RCMS_2000/release.htm)

Grace Kay S. and Alan L. Wendroff (2001). High Impact Philanthropy: How donors, boards and nonprofit organizations can transform communities. John Wiley and Sons, New York.

Greene, Elizabeth. (2001). Study Finds Differences in Giving Patterns Between Wealthy Men and Women. *Chronicle of Philanthropy*, Vol.31 Issue 14, p.12.

Havens John J. and Paul G Schervish. (1999) Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy. Retrieved on 7/20/04 from web site: <http://www.bc.edu/research/swri/features/wealth/>

HNW Survey, 2003, Executive Summary, Wealth and Values. Retrieved on 7/20/04 from web site: <http://www.communityfoundationsofamerica.net/page12932.cfm>

Independent Sector, 2003, A Nation of Givers: Regional Patterns in American Giving and Volunteering.

Johnson, Barry and Lisa. Schreiber. (2002). Personal Wealth 1998, IRS Bulletin.

McCarthy K. Lady Bountiful Revisited. New Brunswick N.J. Rutgers University Press, 1991.

McClelland David and Others (1953). The Achievement Motive. Appleton- Century Crofts.

Microsoft Encarta Encyclopedia (1995). Retrieved on 7/28/04 from website:

<http://www.distinguishedwomen.com/biographies/seton.html>

Mixer, Joseph (1993). Principles of Professional Fundraising: Useful Foundations for Successful Practices. Jossey Bass. San Francisco.

Phipps, Shelley and Peter Burton. (1998). 'What's mine is yours? The influence of male and female incomes on patterns of household expenditure,' *Economica*, vol. 65(260), pp. 599-613.

Salmon, Jacqueline L. Women's Funding Network Women Begin to Share Wealth

Thursday, March 7, 2002; Page B01. Retrieved on 7/20/04 from web site:

[http://www.wfnet.org/news/story.php?story\\_id=78](http://www.wfnet.org/news/story.php?story_id=78)

Schervish, Paul. (1993). Does Generosity Run in the Family? *Advancing Philanthropy, Journal of the National Society of Fundraising Executives*, Volume 1, no. 1, Fall 1993: pp. 26-29

Schervish, Paul. (1997). Major Donors, Major Motives: The people and purposes behind major gifts. *New Direction for Philanthropic Fundraising*. Josey Bass Publishers.

Scott, Anne. (1990). "From Charity to Reform" in Eds. McCarthy, K. Parallel Power Structures, Lady Bountiful Revisited. New Brunswick N.J. Rutgers University Press, 1991.

Shaw Sondra and Taylor Martha. (1995). Reinventing Fundraising, Realizing the Potential of Women's Philanthropy. San Fransisco: Jossey-Bass.

Sublett, Dyan. (1993). Women's approach to Philanthropy: A Learning Model. In A.J. von Schelgell & J.M Fisher (Eds.), *New directions for philanthropic fundraising: Women as donors, women as philanthropists* ( 47-59) San Francisco: Jossey Bass.

The Holy Bible, New King James Version.

Todd Richard (November 1996). Looking for Andrew Carnegie, reprinted from Worth magazine. Retrieved on 7/20/04 from web site:

[http://access.minnesota.publicradio.org/civic\\_j/giving/resources/paper\\_todd.shtml](http://access.minnesota.publicradio.org/civic_j/giving/resources/paper_todd.shtml)

U.S. Department of Labor Bureau of Labor Statistics 2002, p.3 Retrieved on 10/20/03 from web site: <http://stats.bls.gov/cps/cpswom2002.pdf>

US CENSUS. (2000). Retrieved on 10/20/03 from web site:

[www.census.gov/main/www/cen2000.html](http://www.census.gov/main/www/cen2000.html)

US Department of Commerce. (1999). Minority Population Growth: 1995 to 2050.

Minority Business Development Agency. Retrieved on 8/05/04 from website:

<http://www.mbda.gov/documents/mbdacolor.pdf>

**INTERVIEW GUIDE**

- 1. What type of organizations do you fund?*
- 2. Does the reputation of the nonprofit affect your giving?*
- 3. What is your type of involvement in the nonprofits you fund?*
- 4. Do you have any religious affiliations? Does this influence your giving?*
- 5. How did you learn your philanthropic behavior? (Family, mentor, church, work, United Way, etc...)*
- 6. What attributes do you look for in the Executive management (ED, Resource development Officer, etc.) of the organizations you fund?*
- 7. How might you pass on philanthropic behavior to the next generation of women donors?*
- 8. Once you have made the decision to give, how is it nurtured by the organization?*
- 9. Is there anything you would like to add?*
- 10. Any final thoughts on your motivations for giving that may help my understanding?*