



The Next Generation of American Giving

New York Nonprofit Leadership Roundtable | June 2010



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Overview

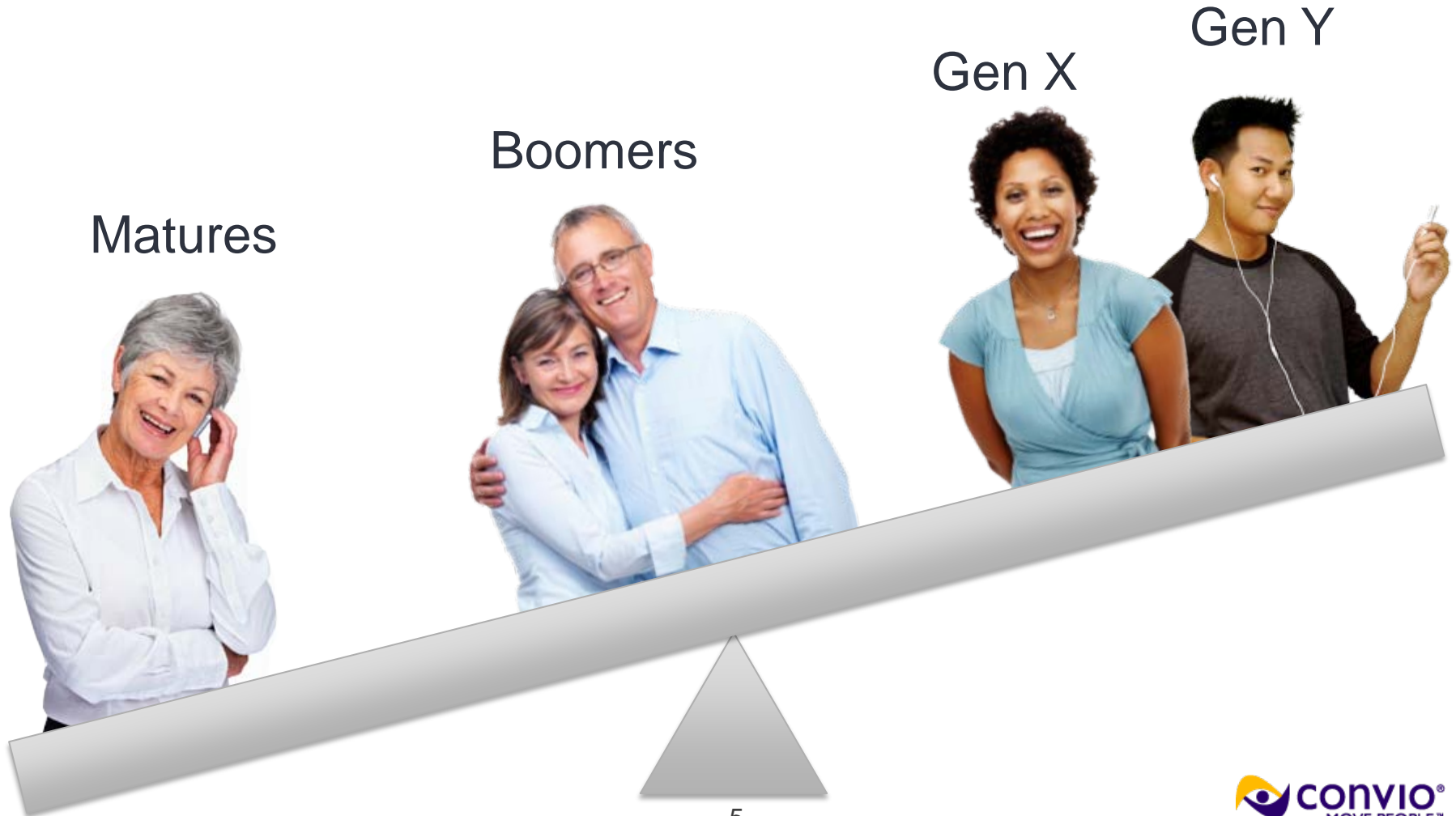


The art and science of fundraising is changing

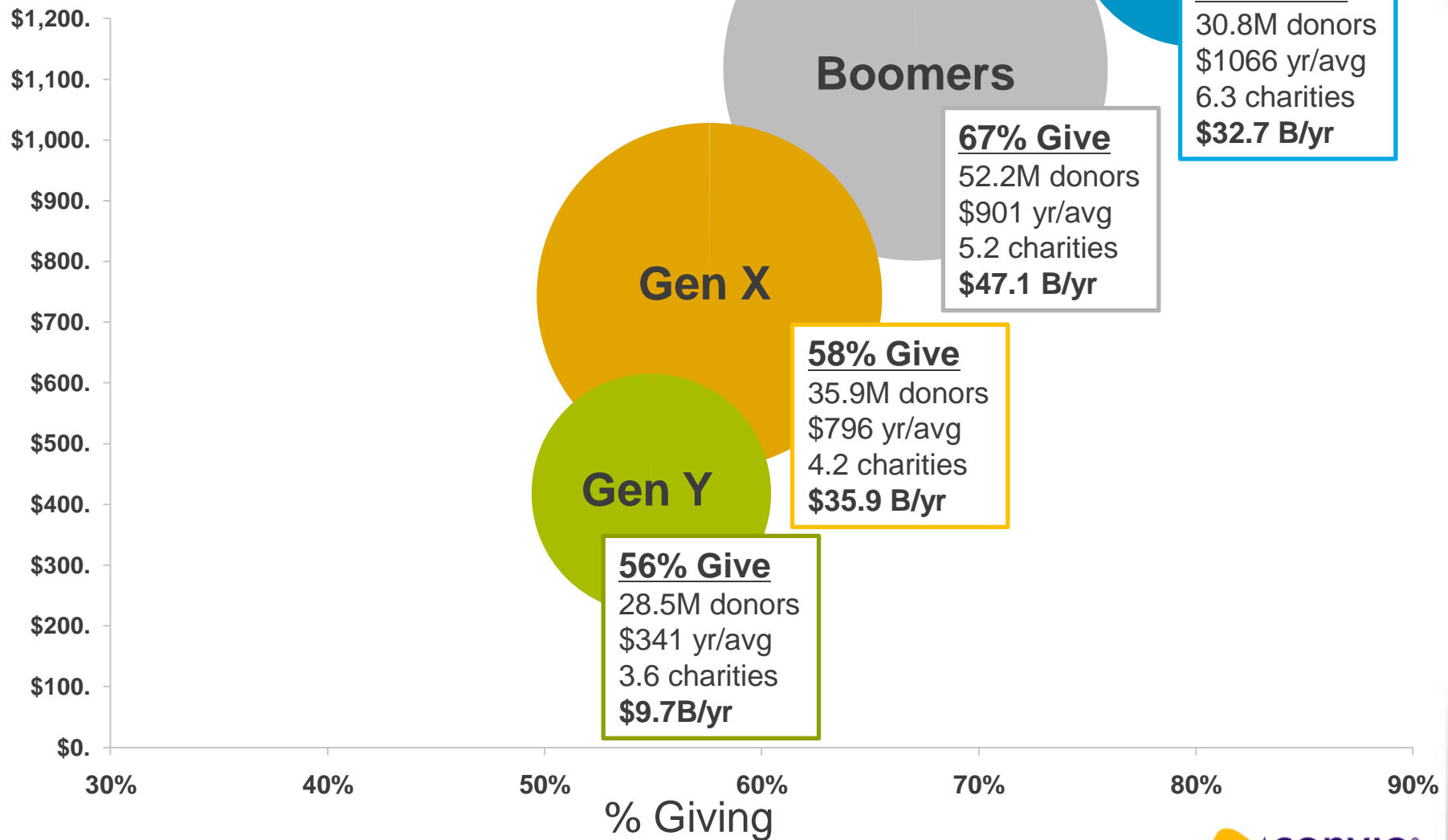
Methodology

- **Phase 1** – Focus Groups among Gen Y and X donors, December 2009
- **Phase 2** – Online Survey of 1500+ US Donors, January 2010

Fundraising Emphasis: Matures

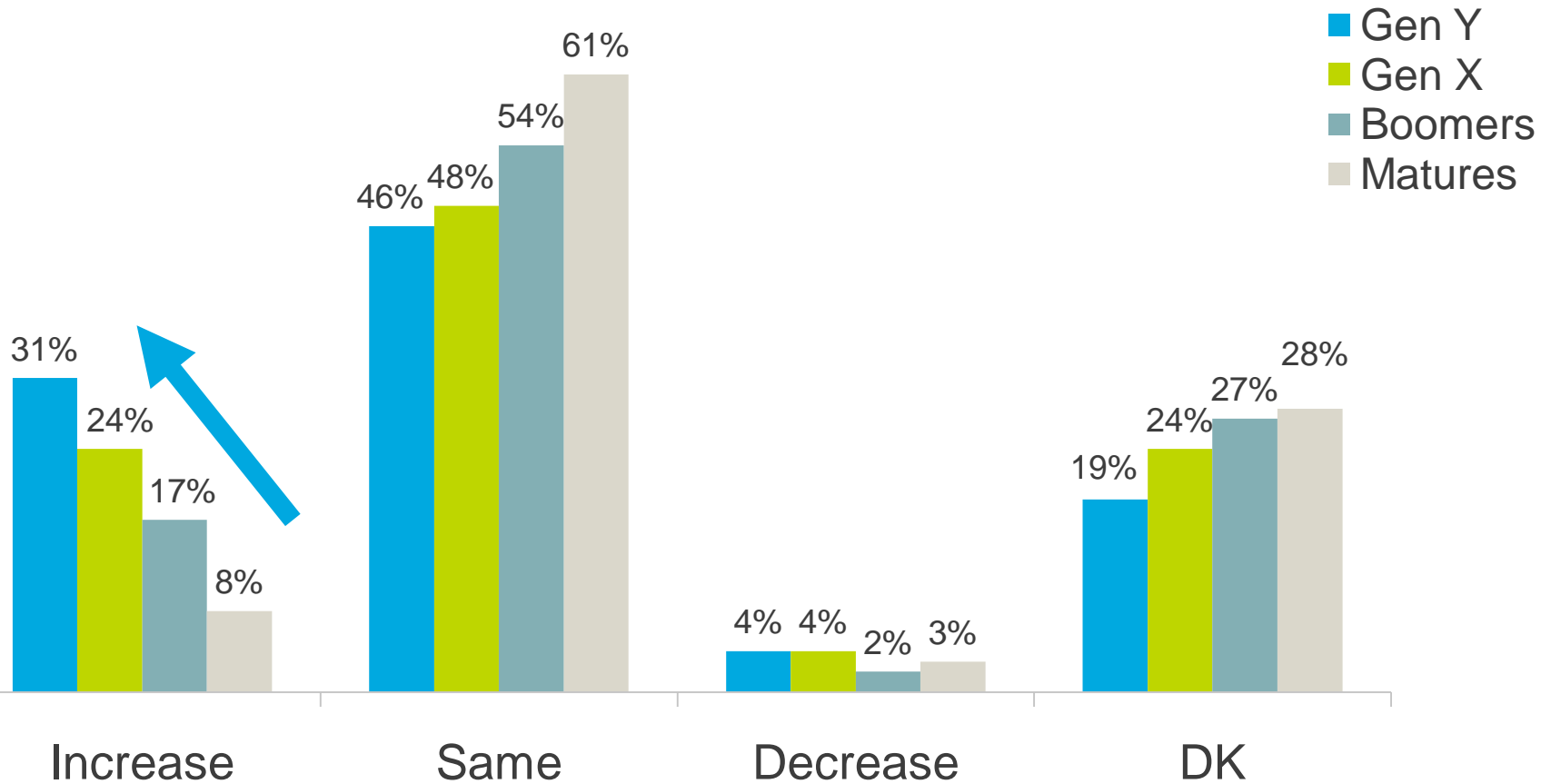


Generational Giving



Future Giving

Donations plans to top charity next year



More on Gen Y



Defining Values

Time to give back
What's in it for me?
Online connection

Value

- Size
- Lifetime value
- Lower cost appeals
- Active supporters/promoters

BUT

- Require multichannel appeals
- Tracking difficult

Social Media Habits

(% doing regularly)

70%

facebook

49%

YouTube

25%

myspace
a place for friends

16%

twitter

Mobile Habits

49% Mobile ONLY phone

32% Mobile primary

42% Facebook Mobile app

53% Texters

More on Gen X



Defining Values

Peer-motivated
Support random, emotional
Time vs. money
Online connection

Value

- Size of gifts to top charities
- Lifetime value
- Lower-cost appeals
- More than dollars
- Viral promoters
- Most Educated, Higher Income

BUT

- Harder to secure

Social Media Habits

(% doing regularly)



Mobile Habits

28% Mobile ONLY phone

37% Mobile is primary

27% Facebook mobile app

40% Texters

More on Boomers



Defining Values

Giving more planned
Efficiency/overhead concerns
2-in-10 retired

Value

- Largest cohort
- Size and dollars
- Income

Tech/Media Profile

29% Facebook (reg)

(60% Total)

17% Texters

47% E-newsletters

55% Bank online

33% Shop online

More on Matures



Defining Values

Pre-meditated giving
Loyal
But guarded
Scrutiny

Value

- Largest annual contributions
- Greater # of groups
- Tracking/Direct mail responsive

BUT

- Smallest cohort and shrinking
- Less open to new appeals

Tech/Media Profile

17% Facebook (reg)

(50% Total)

5% Texters

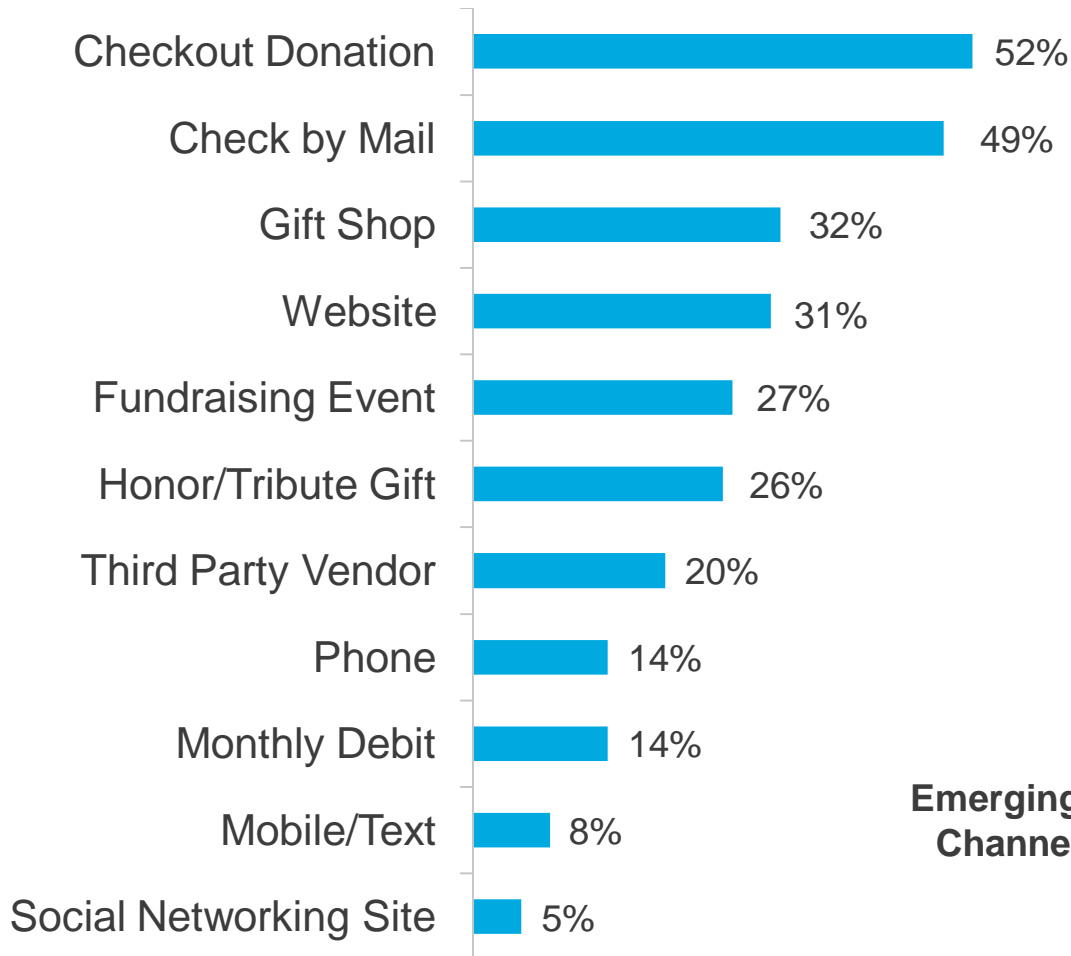
48% E-newsletters

57% Bank online

34% Shop online

Giving Channels

% donated this way in last 2 years (total)



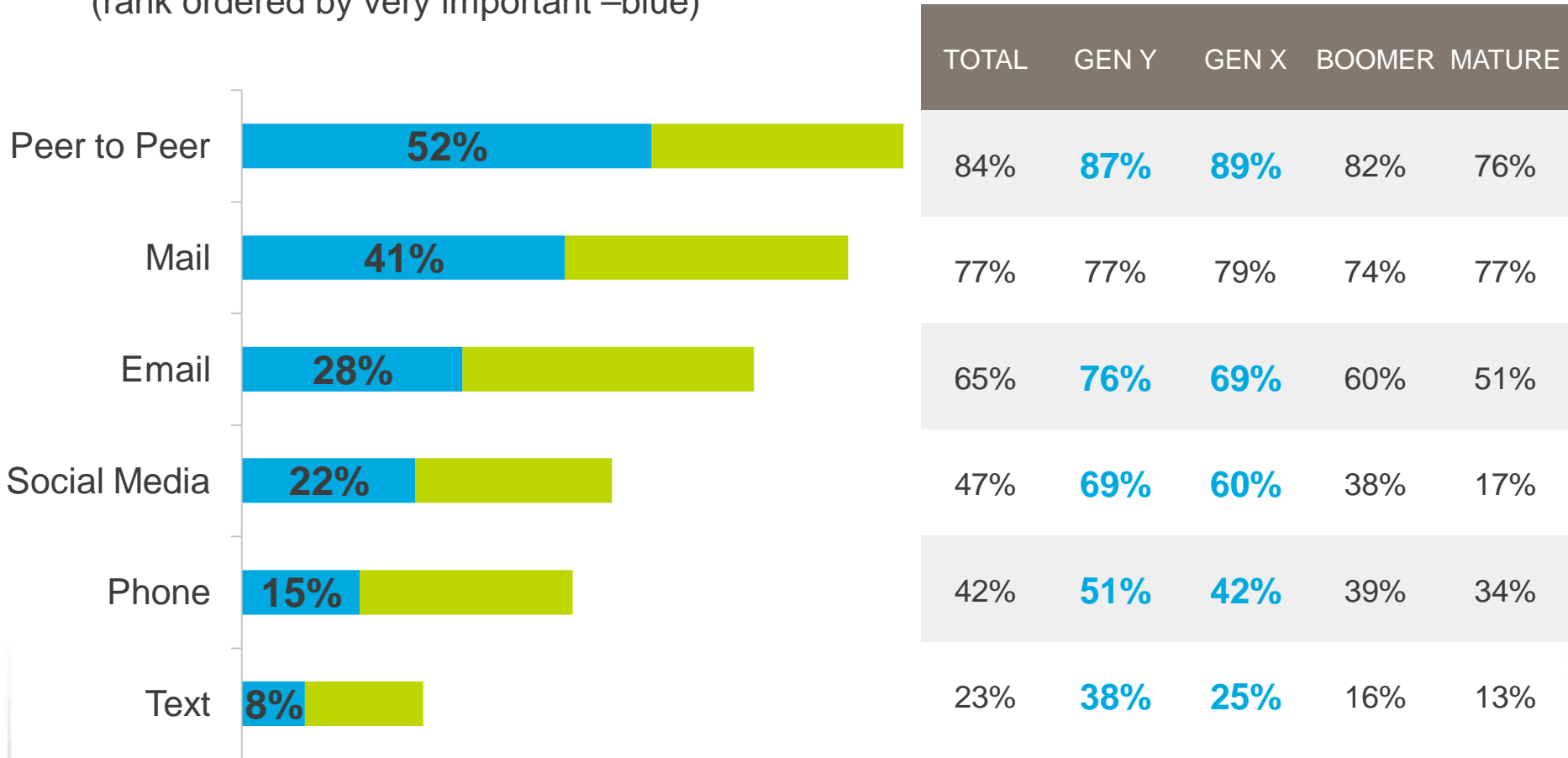
	GEN Y	GEN X	BOOMERS	MATURES
Checkout Donation	48%	57%	52%	48%
Check by Mail	26%	43%	54%	77%
Gift Shop	28%	35%	32%	30%
Website	29%	35%	31%	25%
Fundraising Event	22%	28%	28%	31%
Honor/Tribute Gift	22%	22%	27%	35%
Third Party Vendor	25%	27%	17%	12%
Phone	8%	10%	16%	25%
Monthly Debit	11%	17%	14%	11%
Mobile/Text	14%	13%	4%	2%
Social Networking Site	9%	6%	4%	2%

Emerging Channel

Solicitation Channel Appropriateness

(From charities/nonprofits with established relationship)

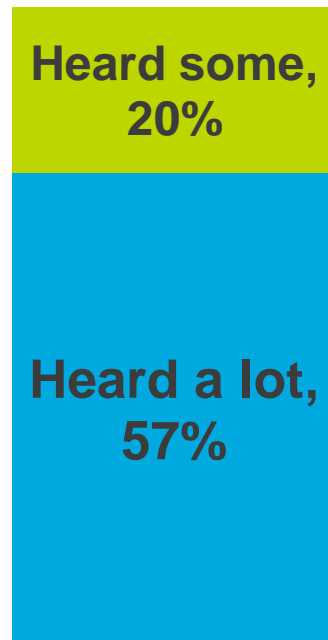
% say appropriate solicitation channel
(rank ordered by very important –blue)



Awareness of Haiti Text-to-Donate

Seen/heard anything recently about making a donation via text for earthquake relief in Haiti?

77% total



Heard a lot

Gen Y: 60%

Gen X: 64%

Boomers: 52%

Matures: 50%



Yes

No

Awareness (top charity)



Gen Y

Mainstream media	27%
Word of mouth	22%
School	18%
Peer to peer event	14%

52% first learned childhood
Average time support: 4 yrs



Boomers

Mainstream media	28%
Mail	19%
Word of mouth	16%
Work/job	11%

55% first learned 30's+
24% childhood, 21% y adult
Average time support: 13 yrs



Gen X

Mainstream media	24%
Word of mouth	18%
Mail	16%
Peer to peer event	11%
Work/job	11%
Product purchase	11%

32% first learned childhood
Average time support: 7 yrs



Matures

Mail	35%
Mainstream media	24%
Word of mouth	18%

68% first learned 30's+
Average time support: 15 yrs

First Engagement



Gen Y

Direct donation	42%	Attended event	19%
Visited website	27%	Promoted to others	15%
Donated goods	23%	Volunteered	15%



Gen X

Direct donation	51%	Attended event	18%
Donated good	28%	Volunteered	16%
Visited website	19%		



Boomers

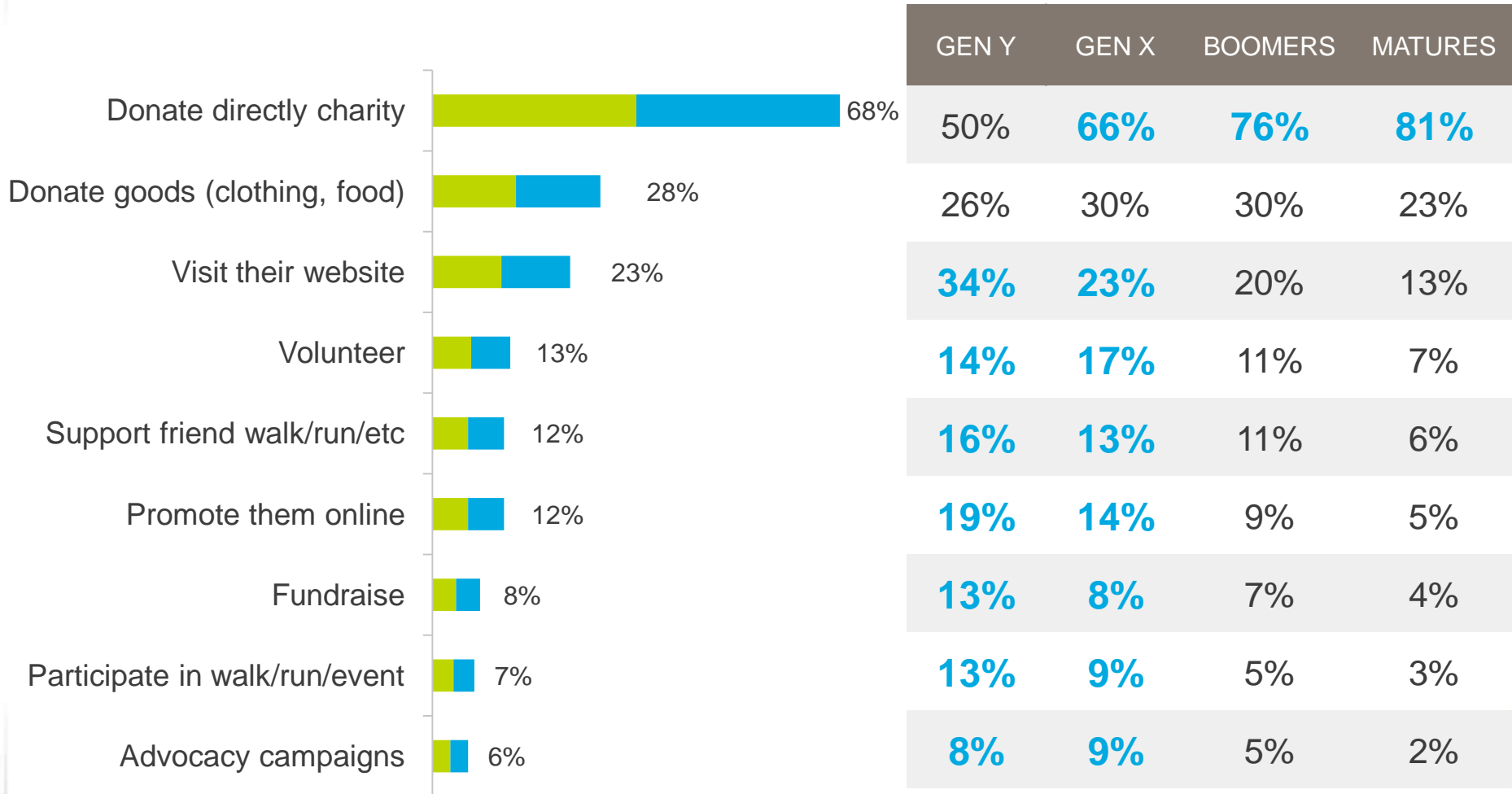
Direct donation	61%
Donated goods	25%
Attended an event	13%



Matures

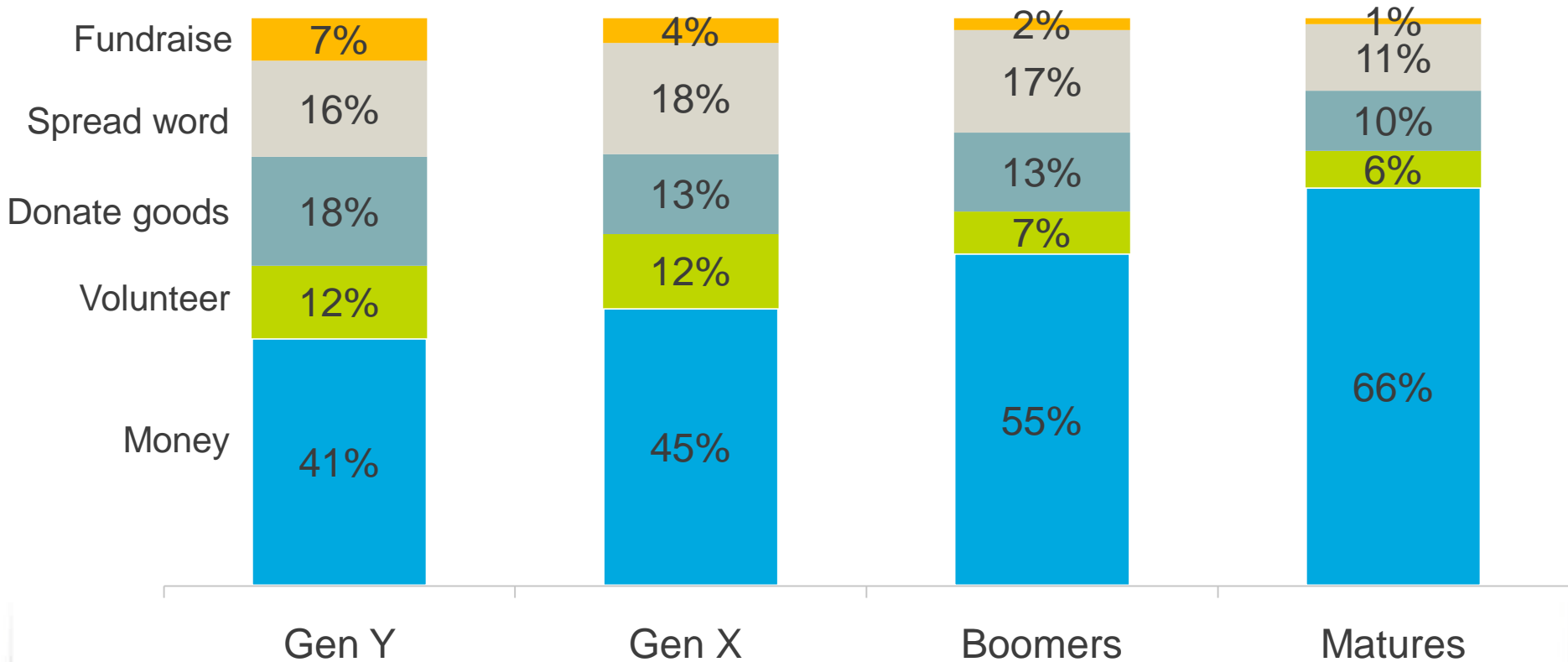
Direct donation	71%
Donated goods	26%
Attended an event	13%

Engagement Today



“Making a Difference”

Where do you think you can make the most difference with (top charity)?



What Does this all mean?



Fundraising is profoundly multichannel



Causation might be impossible to track



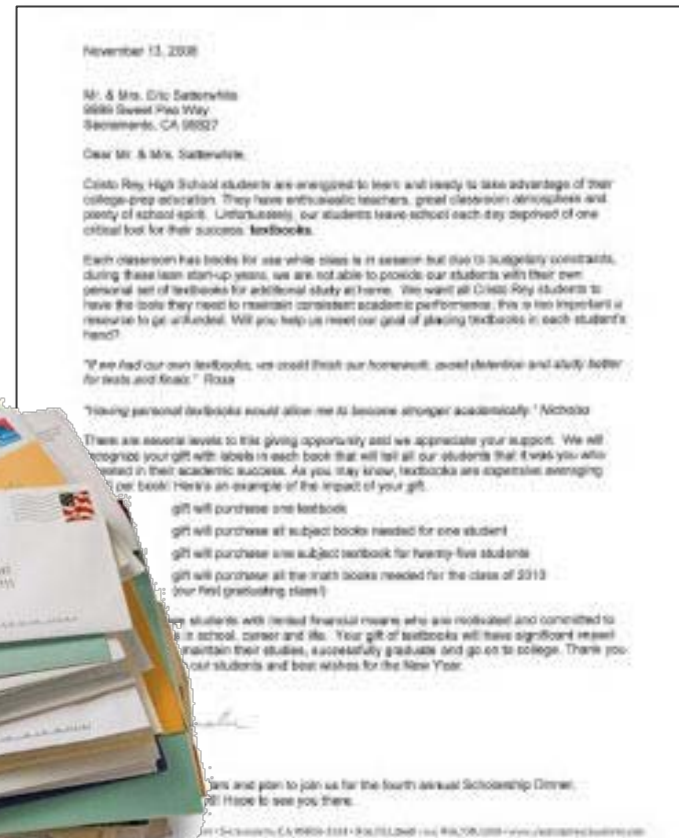
Traditional donor databases are dinosaurs



Remove the silos within your organization



Direct mail and telemarketing need to evolve





**Word of
mouth is
critical**

Social networks are important and still evolving



Boomers and Gen X hold significant value



AT&T 11:14 AM 83%

Earthquake Strikes Haiti

CARE is deploying additional emergency team members and lifesaving aid to the devastated city of Port-au-Prince in Haiti, where the worst earthquake in 200 years destroyed houses, hospitals and critical infrastructure. While the exact death toll from the 7.0-magnitude quake is not yet known, it is expected to be catastrophic. Up to one-third of the impoverished nation's population has been affected by this tragedy.

CARE is rushing aid to Haiti right now. Donate today to help in the relief effort. Your gift will help save lives.

Gift Amount

\$25.00

Credit Card Number: CVV Number:

Expiration Date:

Credit Cards Accepted:

VISA   

Your Information

Title: First Name:

Last Name:

Address 1:



Mobile's time is coming

Content is king



Applying Generational & Channel Learnings



Audit **online strategy** and tactics to determine how we're meeting generational needs.



Create connections between the online and offline worlds to support generation "migration" and giving channel preference.

How are we meeting Generational Needs?

Genera tion	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs. Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies				

Assessment: How do we reach Matures?


Guarded

Scrutinize

- Annual Tax Receipts
- Guidestar/BBB/Charity Navigator Insignia
- Fundraising Expenditure Disclosure
- E-Newsletters



August 31, 2007 Volume 11, Issue 35



[Visit AARP.org](#) [Join AARP](#) [Send To A Friend](#)


Virtual Volunteering
Learn how you can help [make the world a better place](#) on your own time, in your own home or office.

The Quiet Crisis: The Rising Costs of Health Care
If Ben Franklin was alive today, he might write that "nothing is certain but death, taxes and rising health costs." Health care costs are soaring, and more Americans than ever feel less certain they can afford the care they need if something really went wrong. [Something needs to change, and soon.](#)

Game On!
Up, down or side to side, our [crossword puzzles](#) provide hours of fun. New puzzles every day!

AARP Radio: Alison Krauss
She's picked lots of songs she's enjoyed performing and added some new ones. [Alison Krauss](#) talks about working with other musicians and her new album: A Hundred Miles Or More.

Member Benefit: PeoplePC Online
Get unlimited Internet access from PeoplePC Online at the special AARP member rate of \$4.97 a month for the first 4 months, then \$9.95 a month. Surf up to 5x faster with our FREE Accelerator technology! Plus, enjoy Email Virus Protection, Pop-Up Blocker™

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Free Shipping on Note Cards!
plus, 30 free prints for new customers
[get started](#)
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How are we meeting Generational Needs?

Genera tion	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies	Longer-form appeals			
	Annual Tax Receipts			
	Guidestar/BBB/Charity Navigator logos			
	Fundraising Expenditure Disclosure			
	E-Newsletter			

Assessment: How do we reach Boomers?

Pre-meditated Giving

Time vs. Money

- Renewal Appeals and Notices
- Event Fundraising Donation (vs. Participation)
- Basic Donation Forms
- Volunteer Opportunities
- Data Mining Planned Giving



Celebrating Nature
This Earth Day, learn how our donors support nature!
[Read Their Stories](#)

THE LEGACY CLUB
stories of hope

Celebrating Nature | A Gift for You and Nature | Planning for the Future | We Know Real Estate

Gift & Estate Planning

Discover Ways to Give & Save

Smart and creative gift planning with The Nature Conservancy can help you meet your financial objectives, as well as your charitable goals. Explore the many ways you can help the Conservancy protect the lands and waters you love while maximizing your philanthropic giving. [Discover your options today.](#)



Leaving a Conservation Legacy

By making a bequest to The Nature Conservancy, Bob Newson is able to protect nature for the future and leave a conservation legacy. [Read his story.](#)

myRealEstate Gift Guide

Gifts of Real Estate

In three easy steps, [My Real Estate Gift Guide](#) can show you how a gift of real estate to the Conservancy can meet your needs...and create a legacy for the natural world. [Get started.](#)



- **Community Ceremonies**
- Equality Checks and Address Labels
- Take Action
- Membership Center

- mobilize your community to take action,
- expand the voice and visibility of the LGBT community,
- help to change hearts and minds, and
- bolster a nationwide effort to end hate and discrimination.



How are we meeting Generational Needs?

	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs. Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies	Longer-form appeals	Renewal Appeals and notices		
	Annual Tax Receipts	Event Fundraising Donation (vs. participating)		
	Guidestar/BBB/Charity Navigator logos	Basic Donation Forms		
	Fundraising Expenditure Disclosure	Volunteer Opportunities		
	E-Newsletter	Data Mining Planned Giving		
		E-Newsletter		

Assessment: How do we reach Gen X?

Random, peer motivated

Online connection

- Create/Donate to a Tribute Fund
- Make a Sustained/Committed Gift
- Sign a Pledge
- Event Attendance
- Mobile Site Optimization

COM
MAI

AT&T 11:14 AM 83%

Earthquake Strikes Haiti

CARE is deploying additional emergency team members and lifesaving aid to the devastated city of Port-au-Prince in Haiti, where the worst earthquake in 200 years destroyed houses, hospitals and critical infrastructure. While the exact death toll from the 7.0-magnitude quake is not yet known, it is expected to be catastrophic. Up to one-third of the impoverished nation's population has been affected by this tragedy.

CARE is rushing aid to Haiti right now. Donate today to help in the relief effort. Your gift will help save lives.

Gift Amount

\$25.00

Credit Card Number: CVV Number:

Expiration Date:

Credit Cards Accepted:

VISA MasterCard DISCOVER AMERICAN EXPRESS

Your Information

Title: First Name:

Last Name:

Address 1:

ENROLL NOW

jur

Mon

program is
ation work.

TODAY

CONVIO®
MOVE PEOPLE™

How are we meeting Generational Needs?

	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs. Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies	Longer-form appeals	Renewal Appeals and notices	Creation of/Donation to a Tribute Fund	
	Annual Tax Receipts	Event Fundraising Donation (vs. participating)	Make a Sustained/Committed gift	
	Guidestar/BBB/Charity Navigator logos	Basic Donation Forms	Sign a pledge	
	Fundraising Expenditure Disclosure	Volunteer Opportunities	Event attendance	
	E-Newsletter	Data Mining Planned Giving	Mobile Site Optimization	
		E-Newsletter		

Assessment: How do we reach Gen Y?

Time to give back

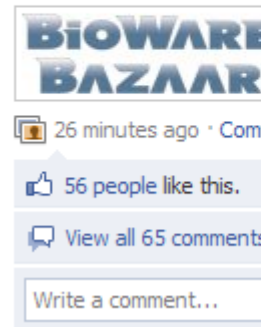
What's in it for me?

- Premiums/Contests
- Event Fundraising Participation (vs Donation)
- Social Media
- Mobile Outreach

JOIN THE MARCH



Mass Effect 2 Welcome to the BioWare Bazaar. This is your chance to earn tokens by reregistering your games, following us on Twitter, answering surveys, etc and then you can redeem your tokens in an online auction to win hoodies, custom painted PCs. You can learn more at <http://social.bioware.com>



JOIN THE MARCH

Sleep Out to End Malaria on April 24th.

WORLD MALARIA DAY - APRIL 25, 2010

How are we meeting Generational Needs?

	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies	Longer-form appeals	Renewal Appeals and notices	Creation of/Donation to a Tribute Fund	Premiums/Contests
	Annual Tax Receipts	Event Fundraising Donation (vs. participating)	Make a Sustained/Committed gift	Event Participation (vs. Donation)
	Guidestar/BBB/Charity Navigator logos	Basic Donation Forms	Sign a pledge	Social Media
	Fundraising Expenditure Disclosure	Volunteer Opportunities	Event attendance	Mobile Outreach
	E-Newsletter	Data Mining Planned Giving	Mobile Site Optimization	
		E-Newsletter		

Create Online + Offline Connection

- Research tells us that a multi-channel approach is the only option for reaching across generational constituencies and for planning for the next generation.
- Key tactics will ease the migration to incorporate digital channels as Boomers come on line and younger generations make more significant financial impact.
 - Online feeder acquisition
 - Multi-channel campaign methodology
 - Segmentation methodology
 - Donor management database

Online Feeder Acquisition

- In the multi-channel world the goals of any online fundraising manager should extend beyond revenue raised online, but the ability to influence the overall relationship through online campaign.
- Online must serve as a list acquisition channel for offline campaigning, similar to capturing an email address in offline channels.

The image displays two versions of an eClub Signup form on the St. Joseph's Indian School website. The top version features a navigation menu with links like 'Home', 'About St. Joseph's', 'Our Children', 'Our Programs', 'The Lakota Culture', and 'How You Can Help'. The main content area includes a 'Make a difference for Lakota children' banner with a 'Limited time! Your gift in any amount will be DOUBLED!' offer, and a 'Donate Today' section. The eClub Signup form is on the left, with fields for 'email address' and 'zip code', and a 'Sign Up' button. The right side of the form features a 'Make a difference' section with a cross icon and a photo of a child. The bottom version of the form is similar but lacks the navigation menu and the 'Donate Today' section. The text 'Test eClub Signup: Image and Premium' is visible at the bottom of the first form, and 'Test eClub Signup: Image, No Premium' is visible at the bottom of the second form.

St. Joseph's Indian School
Chamberlain, SD 57326
(605) 234-3300 • www.stjo.org

Home About St. Joseph's Our Children Our Programs The Lakota Culture How You Can Help Search Go Text Size A

eClub Signup

Sign up to receive monthly email updates and you'll get free address labels, too!

Make a difference for Lakota children

Home > Make a difference for Lakota children

EMAIL THIS PAGE PRINT THIS

Limited time!

Your gift in any amount will be **DOUBLED!**

Our Vision & Mission

Since 1927, St. Joseph's Indian School has provided care and education for Native American boys and girls. St. Joseph's Indian School's stated mission is to provide for the basic welfare of children (food, clothing and medical care) with special emphasis on the spiritual, emotional and educational development of each child, while respecting their culture and heritage.

Donate Today

Help a Lakota child
Tax-deductible gifts provide Native American children in need with a stable home and an education.

Member Log In

Registering on our site allows you access to special content, updates

eClub Signup

Sign up to receive monthly email updates and you'll get a free stationery kit, too!

Make a difference

Home > Make a difference

eClub Signup

Sign up to receive free monthly email updates on St. Joseph's children!

Make a difference

Home > Make a difference

convio
MOVE PEOPLE™

Test eClub Signup: Image and Premium

Test eClub Signup: Image, No Premium

Multi Channel Campaign Methodology

- Take a multi channel campaign approach by following an integrated fundraising calendar.
- Allow constituents to respond in the channel of choice, regardless of solicitation channel – and expect response to cross channels.
- Respect previous giving behaviors and promote offers with consistency.
- Don't overlook a customized homepage experience (in addition to email and direct mail) for delivering your integrated appeal.
- Expect to measure response on an aggregate basis. Ease tracking by using shortcut URLs in direct mail.

How should we respond to new technologies?

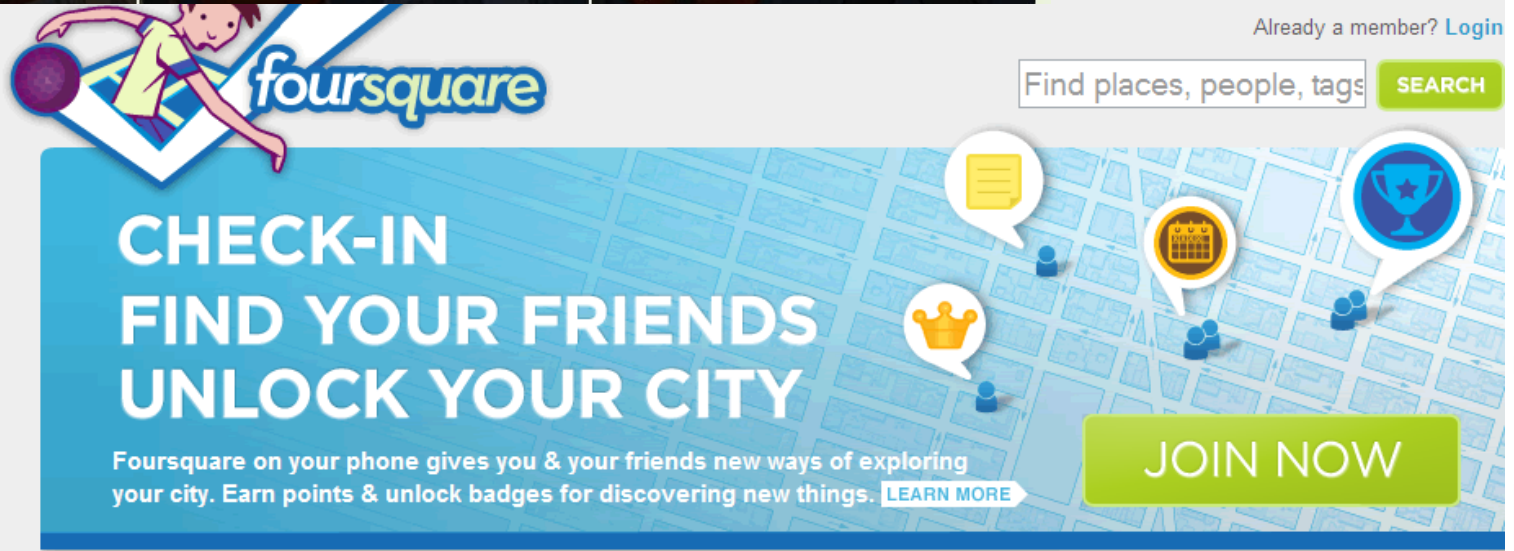


Gowalla Welcome Spots Trips Friends Blog Download Sign In

The **easiest way** to share places you go with friends. **SIGN UP!**

Check in Share with Friends Enjoy Rewards

The Gowalla banner features a dark green navigation bar with the Gowalla logo and links for Welcome, Spots, Trips, Friends, Blog, Download, and Sign In. Below the navigation bar is a light green background with the headline 'The easiest way to share places you go with friends.' and a prominent orange 'SIGN UP!' button. The main content area is divided into three vertical panels: 'Check in' showing a woman with a smartphone, 'Share with Friends' showing a man with a red suitcase, and 'Enjoy Rewards' showing a waitress with a tray of coffee.



Already a member? [Login](#)

Find places, people, tags **SEARCH**

foursquare

**CHECK-IN
FIND YOUR FRIENDS
UNLOCK YOUR CITY**

Foursquare on your phone gives you & your friends new ways of exploring your city. Earn points & unlock badges for discovering new things. [LEARN MORE](#)

JOIN NOW

The Foursquare banner features a light blue background with a map grid. At the top right, there is a search bar with the text 'Find places, people, tags' and a green 'SEARCH' button, along with a 'Login' link. The Foursquare logo is on the left. The main text is in large, bold, white letters. Below the text is a 'LEARN MORE' link and a large green 'JOIN NOW' button. The background is decorated with various icons representing location, friends, and rewards.

How should we respond to new technologies?

- Determine gaps in existing strategy that new technology might fill. Is our strategy balanced for each generation?
- Set realistic goals for the type of response and constituents that technology will drive as part of investment strategy.
 - Is donor conversion a realistic goal for Twitter?
 - Should Facebook be used to drive awareness and outreach through peer-to-peer sharing and gift giving
 - Would we drive visitation to a museum through Gowalla “check ins”?
- Ensure that constituents, particularly Gen X and Y, have the ability to respond in a channel of preference.

Segmentation Methodology

- Is it time to begin capturing birth year data and segment based on generational characteristics and assumptions?
 - No! Instead, cast a wide net with your calls to action, and let the constituent respond to what appeals to them
- Does the offer and primary action change based on what we know about constituents?

Veteran's Organization Memorial Day Campaign				
Generation	Mature	Boomer	Gen X	Gen Y
Call to Action	Give to all Veterans	Give to a Veteran Tribute Fund	Give to a Veteran Tribute Fund	Create a Tribute for a Veteran

Exercise: Apply tactics to campaign

- **Situation:**

The gulf oil spill has created a situation where your organization needs to react and respond.

- **Assignment:**

Create tactics (Online OR offline) that are specifically designed to appeal or motivate your assigned demographic cohort.

Example Tactics Worksheet: Matures

Generation	Matures		
Attitudes/ Values	Family	Financial/Professional	Giving Orientation and Attitudes
	Family out of the house, likely to have grandchildren.	Most likely to give large amounts. Focused on protecting existing investments.	Risk-averse. Focused on known brands and orgs. Places high value on accountability and credibility
Representing your cohort, identify online or offline development office tactics that most appeal to your audience.	<u>TACTIC</u>		<u>RATIONAL WHY</u>
	Embed Charity Navigator and/org BBB logo in collateral and donation forms.		Data told us that Matures value institutional credibility over anyone else.

Findings Review: Generational Focus

- Marketing programs should be optimized beyond seniors alone. Donor acquisition rates have been declining for several years for good reason.
- In the near term, Boomers are your next prime audience, but we can't ignore Gen X and Y.
- The economic value of Gen X and Y goes beyond current giving capacity. They have a lifetime of giving ahead of them, plus demonstrate the willingness to promote their favorite causes online.
- No generation is as loyal as Matures – retaining Boomers, X and Ys will require constant re-inspiration.

Findings Review: Channels

- No channel will dominate for the foreseeable future; all generations are showing multi-channel tendencies.
- The Internet in general has caught up with – or surpassed – direct mail as a core fundraising channel for the youngest segments.
- Word of mouth/peer to peer remains critically important – sometime it's important to be mindful of all the communications channels but let your supporters pick which to use.
- Social media is an important supporting channel for Boomers, X and Y – but not perhaps as important as some say.
- Mobile giving is where online giving was in 1999.

Appendix: Generational tactics worksheets

Tactics Audit: How are we currently serving each generation?

	Matures	Boomers	Gen X	Gen Y
Attitudes/ Values	Guarded Scrutinize	Time vs. Money Premeditated Giving	Online Connection Random, Peer Motivated	Time to Give Back What's In It For Me?
Tactics + Strategies				

Tactics Worksheet: Matures

Generation	Matures		
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	Embed Charity Navigator and/org BBB logo in collateral and donation forms.		Data told us that Matures value institutional credibility over anyone else.

Tactics Worksheet: Boomers

Generation	Boomers		
Attitudes/ Values	Family	Financial/Professional	Giving Orientation and Attitudes
	Has more time to spend on personal hobbies and pursuits.	Starting to form regular giving habits and favorite orgs. Beginning to plan retirement.	Giving more likely to be pre-meditated. Considers “time vs. money” tradeoff
Representing your cohort, identify online or offline development office tactics that most appeal to your audience.	<u>TACTIC</u>		<u>RATIONALE WHY</u>
	Create and promote a sustained giving program.		This group is attracted to the price point and automated convenience of sustained giving programs.

Tactics Worksheet: Gen X

Generation	Gen X		
Attitudes/ Values	Family	Financial/Professional	Giving Orientation and Attitudes
	Starting a family, possibly with small children at home. Everything is busy, busy, busy all the time.	Highly focused on career development, also developing a more significant giving capacity.	Focuses on convenience. Giving more likely to be random or the result of peer-to-peer asks.
Representing your cohort, identify online or offline development office tactics that most appeal to your audience.	<u>TACTIC</u>		<u>RATIONALE WHY</u>
	Develop automated membership renewal efforts that maximize retention rates.		This group is intentional about their giving and renewal efforts, and respond well to online ways to make that easier.

Tactics Worksheet: Gen Y

Generation	Gen Y		
Attitudes/ Values	Family	Financial/Professional	Giving Orientation and Attitudes
	Most likely single, and socially active.	Just starting career, and usually little financial giving capacity, but high enthusiasm for other ways to participate.	Understands things as a value proposition – “What’s in it for me” Looking for ways to “give back”
Representing your cohort, identify online or offline development office tactics that most appeal to your audience.	<u>TACTIC</u>		<u>RATIONALE WHY</u>
	Promote event fundraising participation opportunities (instead of direct donations).		This group is most likely to participate in an event where gifts are solicited from peers.

Questions?



- Vinay Bhagat | vinay@convio.com
- Colleen McCulloch-Learch | McCulloch@edgeresearch.com
- Andrew Magnuson | amagnuson@convio.com

Download the full report

- www.convio.com/nextgeneration

Continue the discussion

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