



THE NEXT GENERATION OF AMERICAN GIVING

Multi-channel preferences and charitable habits
across generations

Session 1 – Understanding the research & its implications

Session 2 – Putting the research into practice with a multi-
channel approach



About Us



Matthew Mielcarek

Director, Strategy Practice

- Leads the Convio Strategic Services Practice
- Experience in internet strategy and technology, account management and advertising since 1995



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Senior Strategy Consultant

- Eight years online marketing experience, with over six years on the Convio Strategic Services team
- Expertise in campaign management, analysis, and strategic planning

Today's Agenda

- Identify key generational differences between donor groups , based on research. Assess size of each group. Understand implications from the research.
- Make sense of myriad online tactics available when building and rationalizing a strategic plan – particularly when investing in social media.
- Discuss how to most successfully reach and cultivate younger donors for a lifetime of support.

The Research

- In 2007 Convio, Edge Research and Sea Change Strategies partnered with 20+ nonprofit organizations on “The Wired Wealthy, Using the Internet to Connect with Your Middle and Major Donors”.
- This follow-up study was designed to look at how different generations learn about, engage with, and donate to charitable nonprofit organizations both online and off.
- Nonprofits have a lot of experience connecting and raising money with older donors. These findings provide the sector with insights on cultivating the next generation of American donors.
- The study also examines emerging trends in outreach and fundraising strategies – such as peer-to-peer and mobile philanthropy. Several additional reports will be released over the next few months.

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.

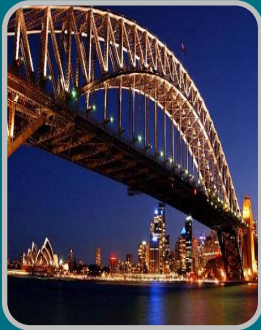
Findings Review: Channels

- 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.

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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plus, 30 free prints for new customers
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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.](#)



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?

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	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

donate now

program is ation work.

How are we meeting Generational Needs?

Genera tion	Matures	Boomers	Gen X	Gen Y
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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

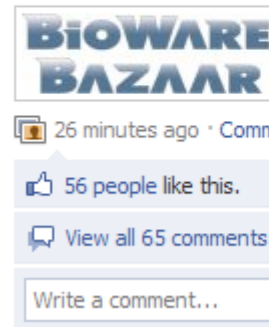
What's in it for me?

- 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?

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	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	
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How should we respond to new technologies?

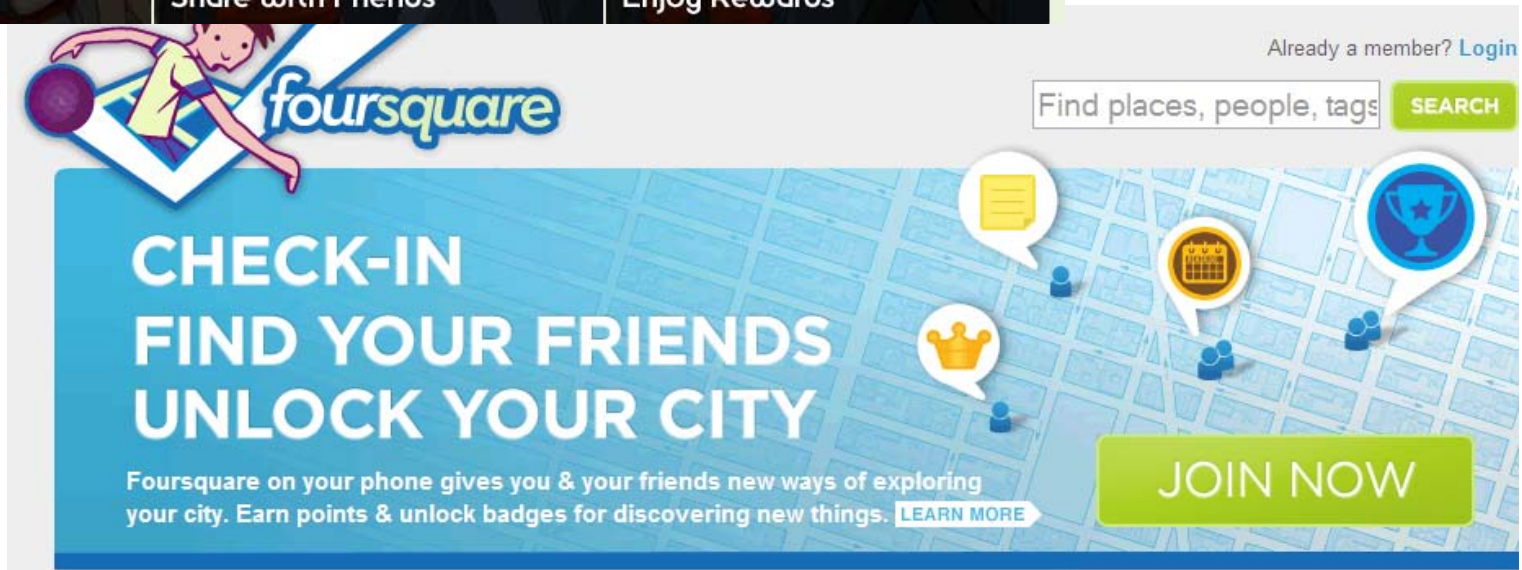


Gowalla | Welcome | Spots | Trips | Friends | Blog | Download | Sign In

The easiest way to share places you go with friends. [SIGN UP!](#)

Check in | **Share with Friends** | **Enjoy Rewards**

The banner features three panels: a woman sitting on a bench using a mobile phone, a man in a green shirt standing at a cafe counter, and a woman in an orange apron serving coffee on a tray.



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 banner features a stylized map background with various icons: a yellow speech bubble, a blue crown, a blue trophy, and a blue location pin. A green button labeled 'JOIN NOW' is prominent on the right side.

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.

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 screenshot displays the St. Joseph's Indian School website. The header includes the school's logo, name, address (Chamberlain, SD 57326), phone number (605) 234-3300, and website (www.stjo.org). A navigation menu contains links for Home, About St. Joseph's, Our Children, Our Programs, The Lakota Culture, and How You Can Help. A search bar and text size options are also present.

The main content area is divided into several sections:

- eClub Signup:** A section on the left with the heading "Sign up to receive monthly email updates and you'll get free address labels, too!". It includes input fields for "email address" and "zip code", and a "Sign Up" button.
- Donate Today:** A section with the heading "Help a Lakota child" and subtext "Tax-deductible gifts provide Native American children in need with a stable home and an education." It features a "Donate Now" button.
- Make a difference for Lakota children:** A central banner with the text "Limited time! Your gift in any amount will be DOUBLED!". Below this is a photo of two young girls. To the right of the banner are links for "Home > Make a difference for Lakota children", "EMAIL THIS PAGE", and "PRINT THIS".
- Our Vision & Mission:** A section at the bottom with text describing the school's mission since 1927, focusing on the basic welfare and development of children while respecting their culture and heritage.

Two smaller versions of the eClub Signup form are shown on the right side of the screenshot, each with a "Sign Up" button and a "Test eClub Signup" label below it. The top one is labeled "Test eClub Signup: Image and Premium" and the bottom one "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.

Segmentation Methodology

- Is it time to begin capturing birth year data and segment based on generational characteristics and assumptions?
- 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

New Approach to Donor Management

- Open, flexible infrastructure necessary for managing the next generation of donors
- Database should support tracking and visibility into multichannel interactions
- Ability to “hook” into other data sources
- 360° view of constituents
- Access “on-the-go”



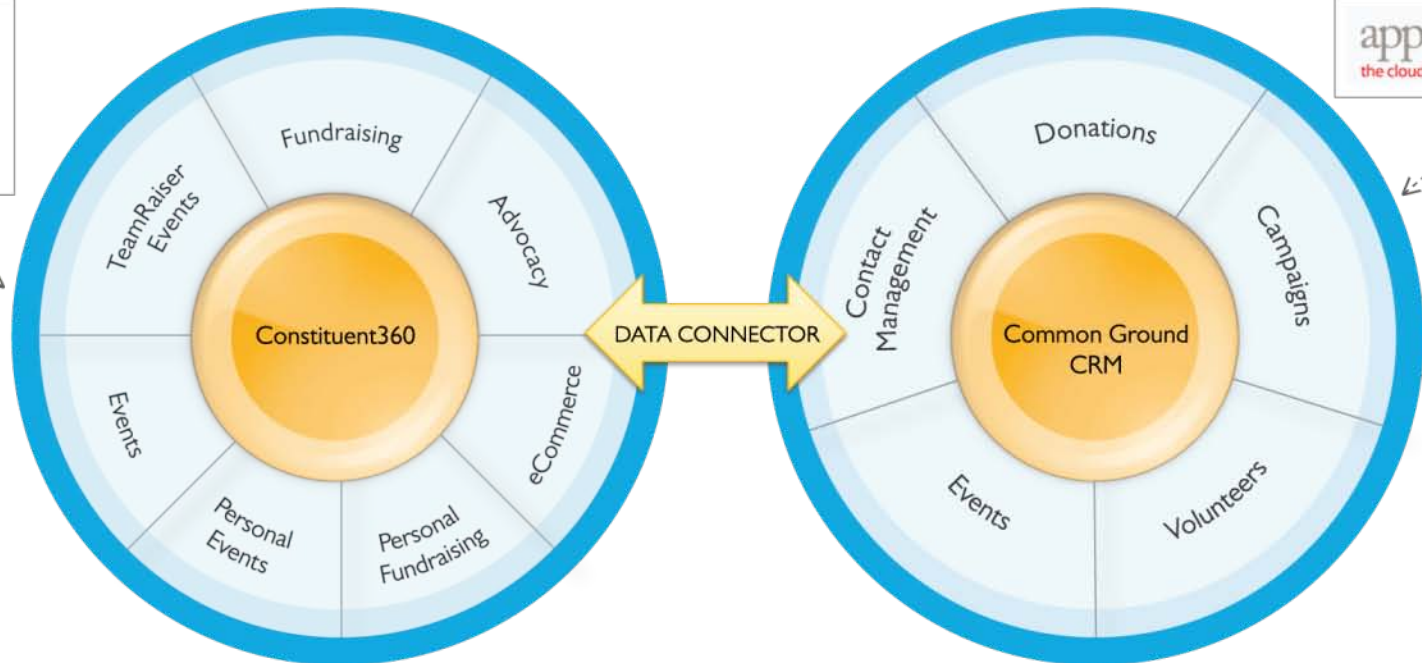
Convio Platform Supports Multi-channel

CONVIO ONLINE MARKETING

COMMON GROUND

3rd Party Extensions

- Facebook
- YouTube
- Google



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- | | | | | | | |
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| Email Marketing | Content Management | Payment Processing | MultiCenter | Report Writer | Data APIs | Web Services |
|-----------------|--------------------|--------------------|-------------|---------------|-----------|--------------|





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