

# Donors and Marketing to Generations

Montana Nonprofit Association  
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*Presented by Judy Held  
President, Benefis Healthcare Foundation*

For many nonprofits, this is the  
entire case:

*We do good work.*

*We need/deserve  
money.*

Or...

**An endowment sure  
would be sweet.**

Or...

**Let's grow to twice  
our size. Who can  
we tap for cash?**

# What impacts giving?

The Indiana University Center of Philanthropy analyzed data from 10,000 people recently, 80% of whom had given to charity – representing all five generations we will discuss this morning. They found:

- The amount people give rises along with their income, level of education and frequency of attending religious services. Age didn't necessarily matter (except in giving to religious causes).

# What's going on in the world?

- We're aging.
- We're living longer.
- Women are living longest.
- We will have a minority majority by mid-century.
- The economy is scary.
- We've gone global.

# How are we reaching our prospects and donors?

In the Campbell Rinker Donor Pulse Survey: 2008 Summary Report

(Phone and Internet surveys – at least 18 years of age and had to have made a donation in 2007 - 3,312 surveys completed)

In 2007, what types of contact prompted you to donate?

- **Fundraising Event 39%**
- **Letter 37%**
- **Workplace Campaign 20%**
- **Telephone Call 20%**
- **Something in magazine, newspaper or newsletter 13%**
- **Email 11%**
- **Something on TV 11%**
- **Something on a website 11%**
- **Something on the radio 9%**

Insanity is when you do the same thing over and over again and expect a different result.

-- Albert Einstein

We are in the midst of an  
Evolution,  
not a  
Revolution.

The secret to success hasn't  
changed:

Know your audience!



"What does this trust exercise teach us? Never take your donors' support for granted."

# Why Study Generations?

Ancient Proverb:

Men resemble their times more  
than they do their fathers.

A word about:

Generalizations

vs.

Stereotypes

# Factors shaping us -- *Other* than our generation...

- Our families
- Socio-economic background
- Religion
- Ethnicity
- Region in which we were raised
- Geography
- Urban or Rural
- Special Needs

The Key to Generational  
Marketing:

The TITANIUM Rule!

# 4 key generations will dominate during the next 25 years.

- As development professionals, we should develop a different communication style for each.
- Giving is going to become more complex due to shifts in messaging preferences
- The tried and true soon may not work (are they already stumbling?)
- Just like our marketing should be segmented by generation...so should development.

The Five Generations:  
Characteristics,  
How They Were Raised,  
Messages that Shaped Them

# **The Greatest Generation**

## **Born 1901-1924**

**“The GI Generation”**

**Age 84 and older**

# **The Silent Generation** **(Born 1925 – 1945)**

**“Traditionalists”**

**“Builders”**

**Ages 63 to 83**

**75 million people**

**Baby Boomers**  
**Born 1946-1964**

**The “Me Generation”**

**Ages 44-62**

**80 million people**

# **Generation X**

## **Born 1965-1979**

**“Baby Busters”**

**Ages 29 – 43**

**46 million people**

# **The Millennial Generation**

## **Born 1980 - 2000**

**“Generation Y”**

**“The Echo Boomers”**

**Ages 28-43**

# Greatest Generation

- Loyal to institutions and cause
- Grateful for opportunities
- Proud to be team players
- Prefer crisp gender roles and definitions
- Came of age during the depression
- Enjoy being thanked but do not always need personal involvement after a gift
- Frugal
- Patriotic
- Conservative
- Optimistic
- Problem-Solvers

# The Silent Generation

- Look to society for clues about how to conform
- Comfortable with chain of authority
- Dedicated workers
- Ambivalence about technology (science is good but things change too fast)
- Nostalgia for lost innocence, youth

# Baby Boomers

- First generation with a majority of women working outside the home
- Competitive
- Want to make a real difference when they give time/money
- Emotional/spiritual connection to a cause helps to define their lives
- Lifelong learners

# The BABY BOOMERS

- Told they could do anything!
- Life is a voyage of self-discovery.
- Tended to buy first, pay later.
- Competitive
- Career-Oriented
- Optimistic
- But now...Baby Gloomers?

# “The Gloomiest Generation”

A report from the Pew Research Center – released June 25, 2008

By D’Vera Cohn, Senior Writer, Pew Social & Demographic Trends Project

Survey conducted by phone between 1/24 and 2/19/08 – randomly selected nationally representative sample of 2400 adults.

“The Period of  
Great Devaluation”

# Generation X

- Several careers, several marriages
- Extremely physically active
- Pragmatic vs. idealistic
- Insists on accountability
- Distrusts institutions
- Wants to make an immediate, specific difference

# Generation X

Most maligned generation of the 20<sup>th</sup> century. Characterized as aloof, cynical and fiercely independent.

AND, they have been overlooked by charities as an active philanthropic group.

Engaging  
Generation X-cellent!

# Millennials

- Idealistic
- Cause-driven
- Think of themselves as citizens of the world
- Communicate instantaneously via computer, phone

# Millennials

- Optimistic and positive about life.
- Technologically savvy.
- Impatient.
- Exceedingly high community standards.
- More materialistic than Gen X and Baby Boomers.
- Not remotely shy about flaunting personal details.
- They don't plan ahead.

# Millennials as “Social Citizens”

- They grew up with digital technology.
- They work collaboratively.
- They believe they can make the world a better place to live.
- They are living their lives green, connected, passionately, idealistically.

Millennials could become lifetime donors. Investing in them now can be very profitable for our long-term success.

*More Interesting Info:*

Individuals enter their prime giving years in their 50's and tend to donate most generously into their early 70's

## Generation      Years of Prime Giving

Silent                      1980 - 2019

Boomers                    2001 - 2039

Gen X                      2020 - 2054

Millennials                2035 - 2075

# Other Thoughts: Civic Engagement

- Membership in civic organizations and professional societies peaks among men and women in their 40's and 50's.
- Giving is linked to participation.
- Not participating – not giving.

# Bond...James Bond

(How to connect with each generation)

# Greatest & Silent (WWII)

- ✓ Emphasize traditional values
- ✓ Earn their trust
- ✓ Don't waste their time
- ✓ Use formal language in all communications
- ✓ Show your appreciation for them
- ✓ Don't stereotype them as "seniors"
- ✓ Stress simplicity.



"Business casual does not say to me  
'major endowment.' It says 'annual gift.'"

# Boomers

- ✓ Cater to their need to forge their own paths
- ✓ Recognize their attractions to things that make their life easier
- ✓ Present info in terms of categories and options
- ✓ Provide plenty of personal gratification and public recognition
- ✓ Eliminate bureaucracy
- ✓ Give them a cause for which to fight
- ✓ Use social gatherings and seminars to create word-of-mouth advertising



COFFEE  
AND A  
FOUNDATION\*

\*Have a coffee and set up a  
foundation at the same time

Cable

# Gen X

- ✓ Give them plenty of access to information.  
Keep them in the loop.
- ✓ Give them leadership roles.
- ✓ Ask them to volunteer on entrepreneurial projects.
- ✓ Don't use overly slick marketing pitches.
- ✓ They demand candor and honesty.
- ✓ Respect their individuality.

# Millennials

- ✓ Include a colleague closer to their age
- ✓ Be positive!
- ✓ Use an entertaining, light-hearted approach.
- ✓ Show respect for their achievements.
- ✓ Pull out all the stops – a technologically impressive presentation!
- ✓ Find out their goals and tie your message to them.



"My wardrobe ranges from pinstripes to grunge depending on the prospect we're visiting"

“What we’ve got here is a failure to communicate.”

-- Paul Newman in “Cool Hand Luke  
(1967)

# Persuasive Language: Words that work!

# WWII

- Authority
- Discipline
- Leader
- Rank
- Respect
- Sacrifice
- Consistent
- Dependable
- Great
- Orderly
- Stable
- Trustworthy

# Baby Boomers

- Consensus
- Human Rights
- Involvement
- Relationship
- Team
- Tolerance
- Trust
- Fair
- Equal
- Humane
- Interpersonal

# Generation X

- Alternative
- Numbers
- Operation
- Reality
- Results
- Competent
- Efficient
- Functional
- Independent
- Pragmatic
- Sensible

# Millennials

- Achievement
- Challenge
- Collaborate
- Community
- Discovery
- Future
- Goals
- Fun
- Positive
- Come together
- Cutting Edge

# Drive 'em Crazy!

- Show indecisiveness.
- No chance for input
- Too much time spent on process
- Not enough info about results
- Negative about their technical savvy
- Be touchy-feely

# Ready, Set, MOTIVATE!

- Connect their actions to their personal goals.
- Show them how they will personally make a difference.
- Give them choices, let them decide.
- Connect their donation to the overall good of the organization and its mission.

# Contacting Them

## Making Meetings Work

- Text
  - Handwritten note
    - Formal Letter
- E-mail (but don't ask me to call you back)

# Turnoffs

- Profanity
- Unfriendliness
- Flashiness
- Cynicism
- Poor Grammar
- Acronyms
- Slang
- Disorganization
- Lack of respect for tradition & experience
- One-upmanship
- Brusqueness
- Inefficient Use of Time
- Condescension
- Shows of Power
- Unfairness

# Deciding to Give

Charitable giving as an Investment

*Lots of research being done  
before giving.*

Results are expected.

*Accountability is important!*

# Getting On-Line

# Convio Survey: Using the Internet to Connect with Your Middle and Major Donors

March 24, 2008 – online survey of 3,443 donors who had given a cumulative \$1,000 or more and had a valid email address...within 18 months of August 2007 in 23 major nonprofit organizations

“We have long believed that when the rate of change inside an institution becomes slower than the rate of change outside, the end is in sight – it’s just a question of when.”

-- Jack Welch, General Electric  
in a letter to share owners, 2000

--Some person on a blog I was reading said, about the upcoming generations of our donors...

*“They’re looking to you to be the expert, to apply their generosity for maximum impact. Or even to invent some new, better way to change the world that they’d never dreamed of.”*

So as you exit this session and go back to the office later today or tomorrow, remember a proverb from an old Chinese friend:

*He who deliberates fully before taking a step will spend his entire life on one leg.*

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