



BUILDING AN AGE  
DEFYING DONOR BASE  
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# KEY TAKEAWAYS

- Define the Generations
- Review Generational donor impact
- Learn the best ways to communicate with each Generation and why





# KEY TAKEAWAYS

- Learn how to target our campaign efforts
- Review the keys to a successful multi-channel campaign that will reach everyone
- Finally, we are going to look at some helpful tools





## WHY IT MATTERS...

One of the largest wealth transfers in history is beginning to take place, as Baby Boomers and the Mature Generation begin to prepare to pass on an estimated \$30 trillion in wealth.





# WHY IT MATTERS...

## Building an Age Defying Donor Base:

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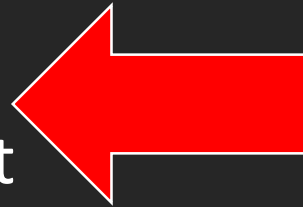
- Ensures the future of your organization
- Provides stability for your organization
- Maintains your organizations relevance
- Energizes your base
- Helps cultivate donor retention





# LET'S REVIEW THE GENERATIONS

- Silent
- Greatest
- Boomers
- X
- Millennials
- Z



Often combined and referred to as the Mature Generation



# TALKING ABOUT OUR GENERATION(S)

**Born 2000-2016**

*Age in 2016: 0 to 16*



**Born 1982-1999**

*Age in 2016: 17-34*



**Born 1966-1981**

*Age in 2016: 35 to 50*



**Born 1947-1965**

*Age in 2016: 51 to 69*



**Born 1929-1946**

*Age in 2016: 70 to 87*



**Born 1916-1928**

*Age in 2016: 88 to 100*



Source: [U.S. Census Bureau](https://www.census.gov)



# QUICK QUESTION

Which generation is most strongly represented in your donor demographics?

- Matures (1916-1946)
- Baby Boomers (1947-1965)
- Gen-X (1966-1981)
- Millennials (1982-1999)
- Gen-Z (2000-2016)
- Not sure







## EXERCISE

Write down or take note of the generation you represent. As we walk through the presentation take note of what relates and what doesn't.

- Matures (1916-1946)
- Baby Boomers (1947-1965)
- Gen-X (1966-1981)
- Millennials (1982-1999)
- Gen-Z (2000-2016)





Current philanthropy infrastructure, along with its best practices, strategies and methods were built for the Mature Generation.

It is increasingly important to understand the up-and-coming generations and calibrate our methods, strategies and practices in a way that increases relationships, giving and giving opportunities in those generations.

Source: "Fewer Americans Find Room in Their Budgets for Charity," Chronicle of Philanthropy, 2017.





Research suggests that, even as total dollars donated is growing, the population of givers is contracting.

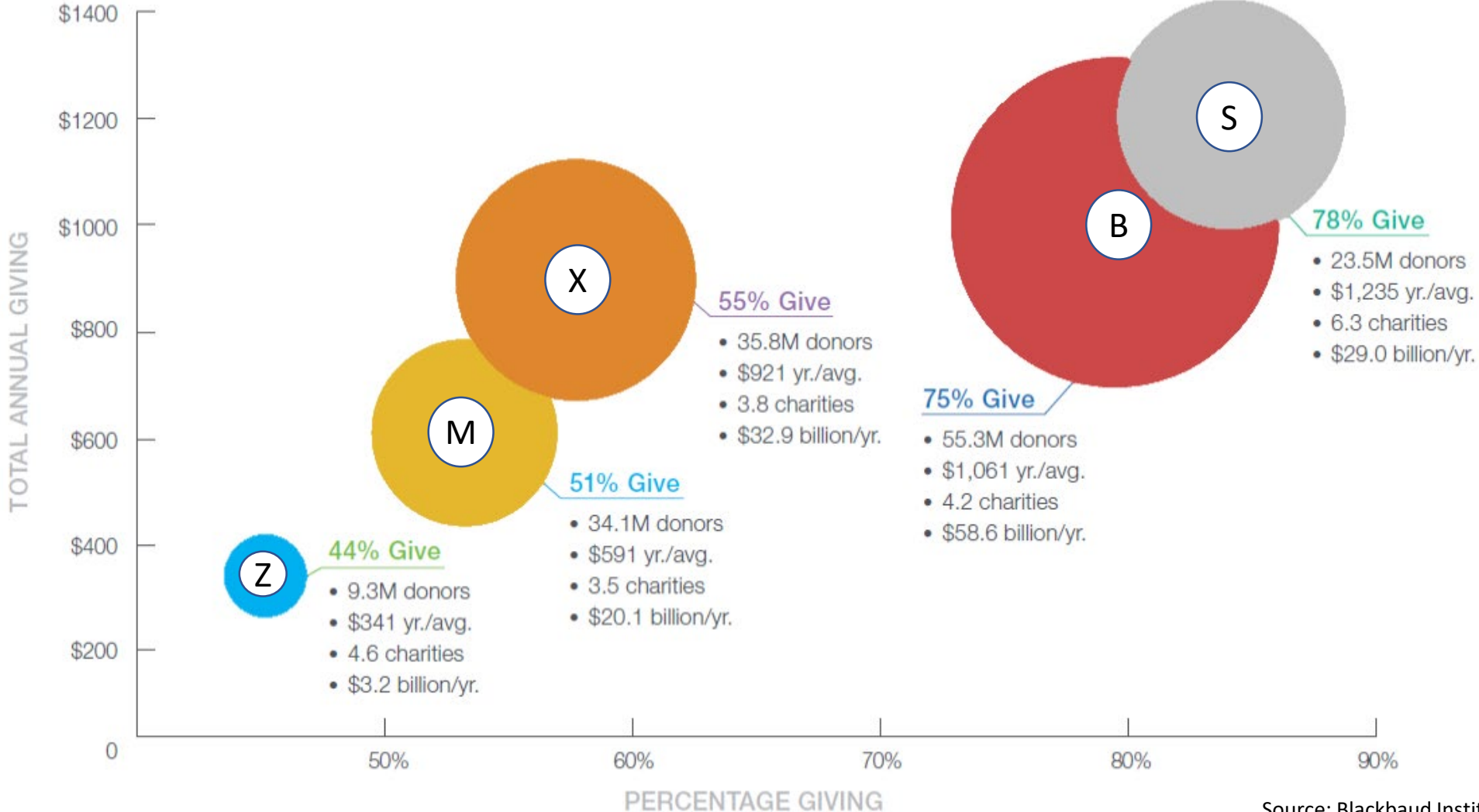
This information reflects the overall importance of *retention as a priority*.

Source: "Fewer Americans Find Room in Their Budgets for Charity," Chronicle of Philanthropy, 2017.



# GIVING BY GENERATION IN 2018

- Silent
- Baby Boomers
- Gen-X
- Millennials
- Gen-Z



Source: Blackbaud Institute





Understanding this data can help us extrapolate and make both forecasts and plans based on what you know about your organization's donor demographics.

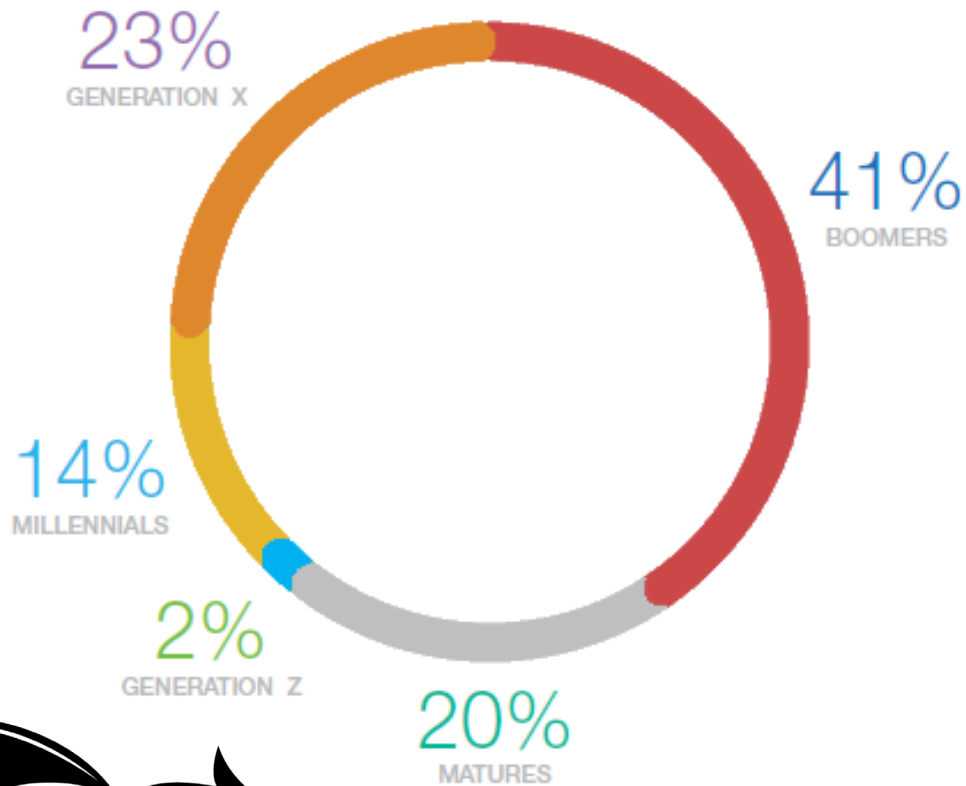




The Pew Research Center estimates that this year – in 2019 – the Millennial generation will overtake baby boomers as the largest adult population group. However, Generation Xers are approaching what have always been prime giving years, whereas millennials are many years away.



## CONTRIBUTION TO TOTAL GIVING (PERCENT OF TOTAL DOLLARS)



	AVERAGE DONATION AMOUNT PER YEAR			CONTRIBUTION TO TOTAL GIVING		
	2010	2013	2018	2010	2013	2018
Gen Z	N/A	N/A	\$341	N/A	N/A	2%
Millennials	\$341	\$481	\$591▲	8%	11%	14%▲
Gen X	\$796	\$732	\$921▲	24%	20%	23%▲
Boomers	\$901	\$1,212	\$1,061▼	40%	43%	41%▼
Matures	\$1,066	\$1,367	\$1,235▼	28%	26%	20%▼

▼▲ shows statistical significance between 2013 and 2018 at a 90% confidence interval.



Source: Blackbaud Institute



- Boomers gave nearly \$60 million to non-profits last year, representing 41% of all the money donated during that period, and they remain dominant givers. Researchers predict the Boomer dominance to continue for at least another 5 years
- The great news is that this gives us all plenty of time to make the pivots needed to engage donors across that generational divide
- Sustainability comes with multi-channel fundraising efforts







## QUICK QUESTION

Do you have a solid and consistent process for segmenting your list?

- Yes
- No
- Kinda



# LIST SEGMENTATION – WHY?

1. Save you time
2. Save you money
3. Increase donations
4. Increase shareability
5. Increase impact
6. Enhance your brand



# LIST SEGMENTATION - TYPES

1. Donor type: For example, major gifts, recurring gifts, etc.
2. Demographic markers: This could be age, geography, political party, etc.
3. Networking flags: used to improve your networking strategy and might track employers, college alumni information, etc.



## LIST SEGMENTATION – MY FAV DEMOGRAPHICS

- Most CRMs allow you to flag and segment in multiples ways
- My most used is demographic is age – or generation – this creates an environment for success in building your age defying donor base
- My favorite is to segment by generation and donor type



# LIST SEGMENTATION – SUCCESS TIPS

- Assign organizationally meaningful donor segments
- Regularly review your donor segments
- Customize strategy for different segments
- Analyze engagement by segments
- Leverage donor segmentation for smart giving and better communication





So... we segmented but how do we meaningfully connect with each generation to maximize support?





# MATURES

## Core Values

Discipline, traditional, conservative, respect authority, hard work

## Attitude Towards Money

Save and pay cash

## Primary Communication Methods

Mail and telephone.

## Top Overall Giving Priorities

\*Worship, local social service, emergency relief, health, children, military, formal education





# BOOMERS

## Core Values

Competition, team players, involvement, optimism, hard work

## Attitude Towards Money

Buy now and pay later

## Primary Communication Methods

Mail and telephone.

## Top Overall Giving Priorities

\*Worship, local social service, health, emergency relief, children, military, animal







# GEN X

## Core Values

Skeptical, task-oriented, pragmatic, prioritize work/life balance, challenge others

## Attitude Towards Money

Cautious and conservative

## Primary Communication Methods

Email, mail and telephone.

## Top Overall Giving Priorities

\*Health, local social services, animal, children, emergency relief, worship, military





# MILLENNIALS

## Core Values

Tech-savvy, directness, multi-tasking, social responsibility, entrepreneurial

## Attitude Towards Money

Earn to spend

## Primary Communication Methods

Email, text and social media.

## Top Overall Giving Priorities

\*Worship, children, local social services, health, animal, emergency relief, youth development





# GEN Z

## Core Values

Cool products, cool experiences, entrepreneurial, tech-savvy, culture creators

## Attitude Towards Money

Careful, avoid debt, already saving for retirement

## Primary Communication Methods

Mobile and app based technology, text, in person

## Top Overall Giving Priorities

\*Worship, children, animal, health, local social services, military, emergency relief





# QUICK QUESTION

Which generation represents the most untapped opportunity for your organization?

- Matures (1916-1946)
- Baby Boomers (1947-1965)
- Gen-X (1966-1981)
- Millennials (1982-1999)
- Gen-Z (2000-2016)





# COMMUNICATION TIPS



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# REACHING THE MATURES

## STAY THE COURSE:

- Direct mail is tried and true
- Handwritten thank you notes
- Automated monthly giving



# REACHING THE MATURES

## AND... THINK OUTSIDE THE BOX:

- Take a multi-channel approach, this generation is online and 35% of matures made an online gift in the last year
- Is your online donation process clear and easy?
- Provide tools and resources to empower them, for example: email templates, sample social media copy, assistance setting up their personal fundraising pages – *that creates a channel to their younger family members and friends.*





# REACHING THE BOOMERS

## HOW THEY DONATE:

- 49% are enrolled in monthly giving campaigns
- 35% donate to crowdfunding campaigns
- 24% gave in response to direct mail
- Handwritten thank you notes







# REACHING THE BOOMERS

## AND... THINK OUTSIDE THE BOX:

- Don't be surprised if they ask to see your financials or annual report, 49% want to know about your finances before donating, be proactive with annual reports
- Provide tools and resources to empower them, for example: email templates, sample social media copy, assistance setting up their personal fundraising pages – *this creates a channel to their younger family members and friends.*





# REACHING GEN X

## HOW THEY DONATE:

- 50% enrolled in a monthly giving program
- They give more frequently than other age groups
- Values connections with nonprofits online, especially through mobile devices and social media
- Inspired to donate by a message, image or video they saw on social media





# REACHING GEN X

AND... THINK OUTSIDE THE BOX:

- Integrate easily sharable and moving content on your social channels with a clear donation path to empower them
- Build trust through transparency – show them the work done with their donations
- 60% of giving hinges on whether they can see their gift's impact
- Provide proof through visual content, like photos and videos of work being carried out





# REACHING MILLENNIALS

## HOW THEY DONATE:

- 40% enrolled in a monthly giving program
- 46% donate to crowdfunding campaigns
- 64% raise money for walk/run/cycling events



# REACHING MILLENNIALS

## AND... THINK OUTSIDE THE BOX:

- Make sure communications are mobile optimized, including email, websites and donation pages
- 25% of donors use their phones to complete donations
- Peer-to-peer fundraising is highly popular with this generation of donors, providing access to a larger network of donors
- 46% prefer asking to replace physical birthday gifts with a donation to a specific non-profit
- Create personalization options that allow supporters to use birthdays, anniversaries, athletic milestones and other life events to raise for your cause.



# REACHING GEN Z – PHILANTHROTEENS

## HOW THEY DONATE:

- Donations prompted via social media and completed via device
- Motivated to support nonprofits and drive social impact
- Motivated to make the world a better place
- Workplace giving, 60% want their workplace to do social good





# REACHING GEN Z – PHILANTHROTEENS AND... THINK OUTSIDE THE BOX:

- Leverage social media channels
- Seek out corporate partners that are popular with younger demographics
- Be authentic in your appeals, and utilize data specific to their demographic
- They have a high tolerance for digital ads
- Focus on Instagram first, then Snapchat and Facebook
- Reach Gen Zers through popular internet and social media influencers, as opposed to traditional celebrities





## GROUP EXERCISE – 10 MIN

- Thinking about the generation offering you the greatest untapped opportunity, craft donor communication that would appeal outside your primary donor segment







How do we honor our Mature generation and Boomers, while courting Gen-Xers and Millennials, without leaving Gen Z behind?

Think Multi-channel.





# QUICK QUESTION

Which method of fundraising do you mostly utilize in your organization?

- Direct Mail
- Email
- Social Media
- Targeted Advertising
- Phone
- Events





# MULTI-CHANNEL WHAT & WHY?

- Simply put – it is asking your donors for a contribution via multiple communication channels.
- For greater impact, utilize language and tools that appeal to the channel demographic





# MULTICHANNEL CAMPAIGNS

Save time, repurpose content, expand your reach and most importantly – leave no one behind.





## SEGMENTATION

Segment your donor base to maximize your campaign efforts.

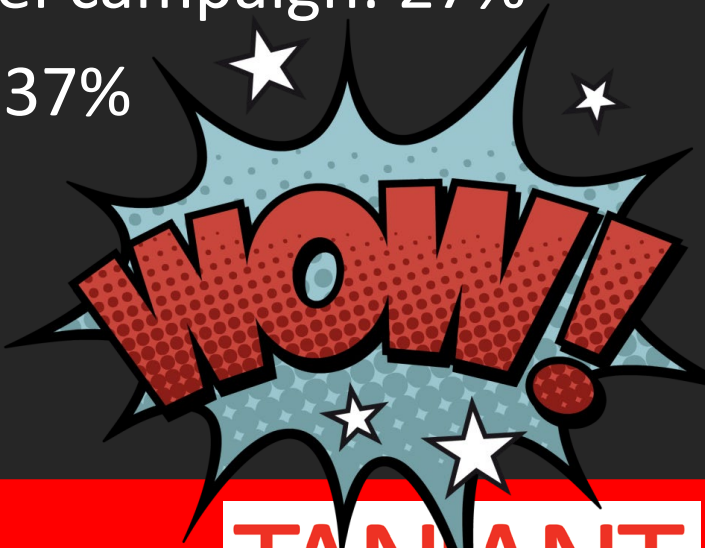




# DRAFTING YOUR APPEAL

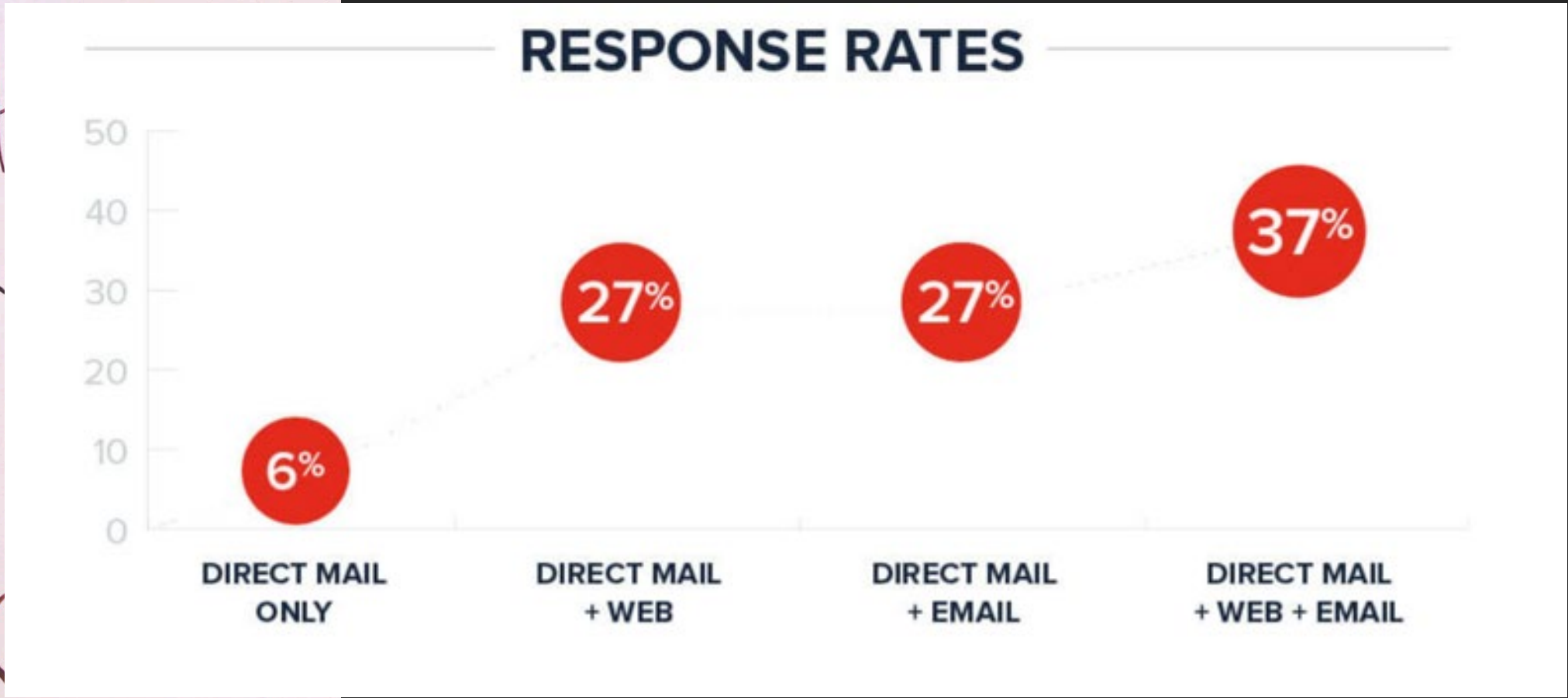
Think of it this way:

- E-mail only response rate: 0.06%
- Direct mail only response rate: 5.3%
- Together as a multi-channel campaign: 27%
- +Social Media & Website: 37%



WEEK 3: Design  
WEEK 4  
WEEK  
WEEK

# DRAFTING YOUR APPEAL





While each generation is different in how they like to be engaged, they're all united by the fact that they are invested in philanthropy.





# MULTI-CHANNEL PLANNING

- Campaign Start/End Date
- Theme
- Goal(s)
- Desired Impact
- Create a timeline with key dates and any weekly/monthly themes



# PLAN DETAILS PER CHANNEL

- Date/Time of message
- Target audience
- Marketing channel
- Message content
- Desired outcome
- Results



# MEASURE: SAMPLE COMMUNICATIONS/MARKETING TRACKER

Date/Time	Channel	Audience	Content	Outcome/Goal	Result
	Email	Current Subscribers	Campaign and goal explained	Campaign awareness	Open rate %
	Facebook, Twitter	Followers	Explain personal fundraising and link to toolkit	Recruit X personal fundraisers	# fundraisers recruited
	Instagram	Followers	Moving video with how to donate	X shares, Y contributions	# shares, \$ contributions
	Email	Current & lapsed donors	Client story, fundraising tools	Recruit X personal fundraisers	# fundraisers recruited
	Mail	Current & lapsed donors*	Campaign share, goal and ask	X contributions	\$ contributions
	FB, Twitter	Followers	Share link to campaign, ask, request share	X clicks Y shares Z contributions	# clicks # shares \$ contributions
	FB	Advertise	Moving video with how to donate	X clicks Y shares Z contributions	# clicks # shares \$ contributions





# PREPARING ONLINE CHANNELS

1. Remove visual clutter & distractions
2. Utilize compelling video
3. Suggest donation amounts and recurrence options
4. Minimize required fields
5. Make sure your site is secure and donations are Payment Card Industry (PCI) compliant
6. Optimize for mobile and tablets
7. TRACK everything so you can analyze and improve





# 5 MINUTE EXERCISE GET YOUR DEVICE OUT

Pull up your  
website/donation page  
on your cell phone.  
Could it be more  
streamlined?





# ARE YOU MOBILE READY?

PERCENTAGE OF GENERATIONAL DONORS WILLING TO GIVE VIA MOBILE DEVICE...

	Web	App	Text to Donate
Matures	18%	3%	3%
Boomers	30%	12%	9%
Gen X	49%	20%	17%
Millennials	62%	34%	19%
Gen Z	59%	32%	17%





# DEVICES USED TO ENGAGE

## IS YOUR WEBSITE MOBILE FRIENDLY?

	Computer	Tablet	Smartphone
Matures	60%	16%	16%
Boomers	66%	20%	25%
Gen X	64%	21%	52%
Millennials	66%	23%	63%
Gen Z	63%	25%	71%





## GROUP EXERCISE – 10 MIN

- Select 2 new channels to incorporate into your development plan or next campaign
- Brainstorm messaging







What makes for a  
successful multi-channel  
campaign?



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## TELL THE STORY

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The number one motivator for both routine giving and unexpected giving is a personal or emotional connection.




# REMEMBER

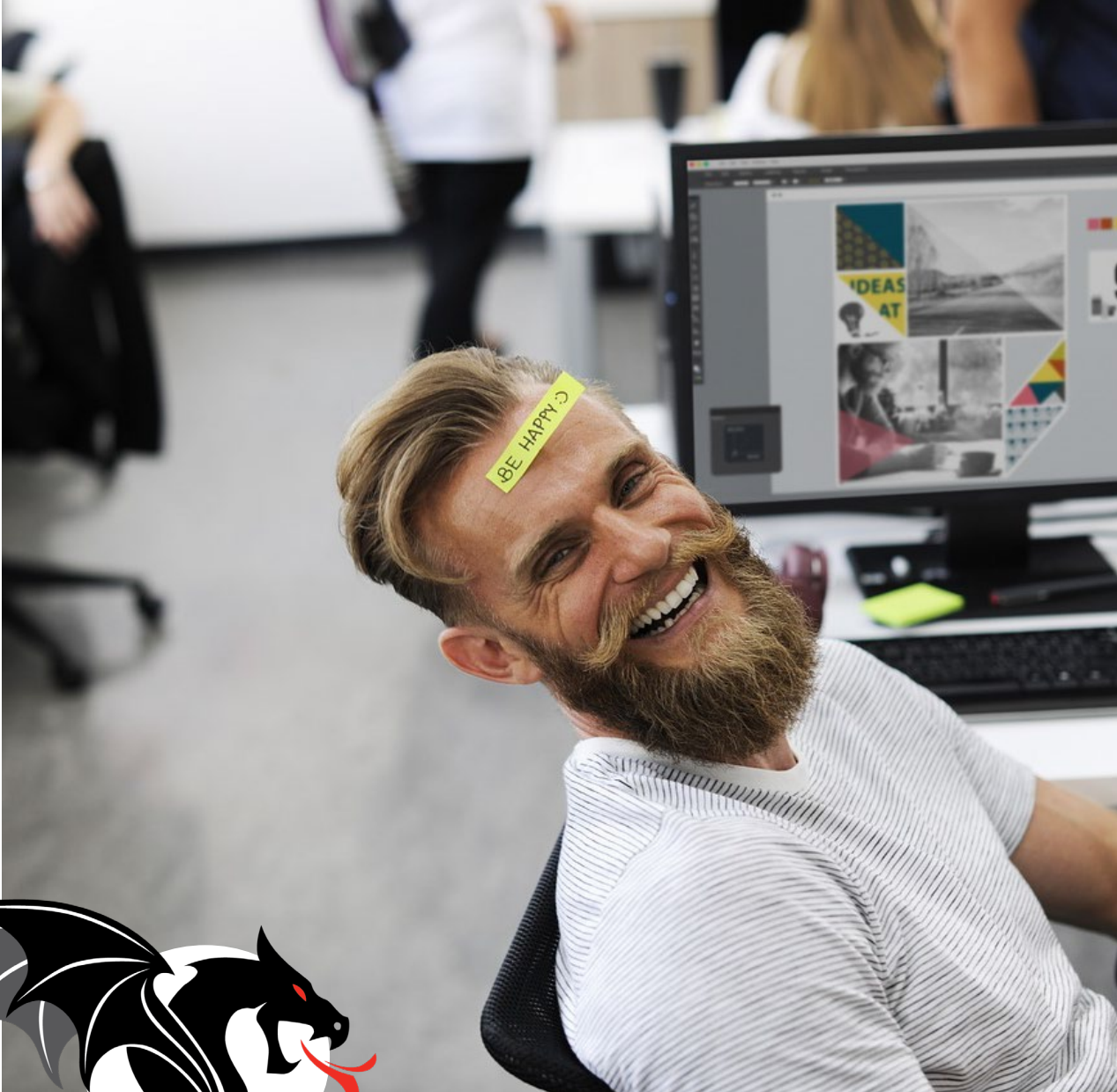
- Personal and emotion connection can be from a personal experience, or experience through a friend or family member
- Storytelling is how you can edit your fundraising copy in such a way that it reaches more people and shows the impact/affect.



NONPROFIT  
STORYTELLING  
**FOR**  
ENGAGEMENT,  
IMPACT &  
FUNDRAISING

A woman with long, wavy blonde hair is sitting on a green lawn, reading a book. She is wearing a dark red top and light-colored pants. The background is a soft-focus outdoor setting with trees and sunlight filtering through the leaves.

Write FREE training on the back  
of your business card and I will  
email the information.



# RELAX

It all starts with your first piece of campaign content, reformatted and repurposed for each channel.

Don't overthink or feel overwhelmed.





Not sure where to start?

Let's look at some tools  
that can make things  
easier





## TOOLS TO HELP

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- Easily make videos with tools like Ripl, Splice or Legend
- Easily make compelling images with tools like Retype or WordSwag





## TOOLS TO HELP

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- Use a social media scheduling tool like Hootsuite, Loomly or native scheduling tools in your social media accounts

Research shows that Nonprofits that choose to invest in digital advertising using targeted ads average \$1 of revenue for every \$0.04 in advertising fees







## TOOLS TO HELP

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- Use a social media scheduling tool like Hootsuite, Loomly or native scheduling tools in your social media accounts
- Create targeted ads on Facebook and Instagram
- Create and project schedules and timelines with a tool like Asana or Hive





# Questions?



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