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Hello everyone, thanks so much for joining us. Thank you for already introducing yourself and starting the dialogue in the chat.

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My name is Lusina Vaccura, vice president of business development and marketing with Alfred Group.

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I use pronouns she her. And today I'm wearing a pink top. I have. Dark short hair, I'm wearing glasses and my background includes a bookcase, a lamp, and a green plant.

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We're very excited. To have you all here. The title of today's session is Future Pro, your mission.

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How to engage 5 generations of donors. Before we dive in, I want to tell you a little bit about Offer Group.

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And go through a few housekeeping items. So I realized that many of you, most of you are very familiar with Alfred Group, but for anyone who may not be familiar, we are a national full service consultancy serving nonprofits across the country.

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We have 6 flagship services. You can see here on the screen. Fundraising strategic planning governance, in terms staffing.

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All things data and diversity, equity and inclusion. We are, a proud sponsor and a member of AFP, the Association of Fundraising Professionals.

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We're a certified women's business enterprise. And a member of the Giving Institute, which houses the given U.S.A. Foundation.

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And we will be referencing the Giving U.S.A. report. Today as well. Of course, you can find more information about us at alford.

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I want to take a moment to pause and acknowledge the land in which we reside. I realize that we are all joining from many many different places across the country.

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I am going to acknowledge Chicago, which is where offered groups headquarters is based. Chicago is located on the traditional unseated homelands of the Council of 3 Fires.

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The Jibuwa, Ottawa, and Padawani nations. Many other tribes such as the Miami Ho Chunk, Menominee, SAC and Fox also called this area home.

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The region has long been a center for Indigenous people to gather trade and maintain kinship times.

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Aw, some webinar logistics. So first of all, this webinar is being recorded. And we will have a copy of the recording available for you shortly after the event is over.

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You'll receive an email within 24 h from all for group with the recording and other information from today's session.

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Once we conclude today's session, you'll be prompted to complete a very, very short survey.

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So about 4 questions. It'll take you a couple of minutes. We encourage you to do so.

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It'll help us plan future webinars. All of you are in listen only mode for the duration of the session today.

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However, as you know, the chat is open. So we encourage you to provide reactions and comments in the chat and to dialogue with each other in the chat.

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If you have a specific question for the speakers today. I would like to ask you to use the Q&A function versus the chat.

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It's just easier for us to track all of the questions. And in your navigation bar, there's an icon you can click on, where then you can chat in your questions.

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That comes to the presenters and will answer as many questions as we can at the end of today's presentation.

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The session is approved for one CFRI credit if you're seeking. Certification or recertification, please know this is approved for one credit to go towards your credential.

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And finally, please join us on social media. We will be posting and dialog in there and we invite you to join the conversation there as well.

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With that, I would like to turn things over to our moderator today. Brenda Biasari is the president and CEO of Alfa Group.

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Recently took over the reins as chair of the Giving Institute. Thank you Brenda and I'll turn things over to you.

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Thank you. Lucinda. Hello everyone, I'm Brenda Asari. My pronouns are she, her, hers.

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I have black wavy here wearing black glasses and a dark top with a red necklace.

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My background is cream color. With, you can see my given U.S.A. books and a plant. So again, hello and welcome.

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We sincerely appreciate you taking the time to join us for this webinar where we will embark upon a comprehensive exploration of the untapped potential that lies in engaging generational donors.

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Bye. By harnessing the power of generational understanding, organizations can amplify their impact. Strengthen their resilience.

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Future proof their organizations empowering them to fulfill their missions with greater efficacy. Organizations that recognize the significance of tailoring their approach to each generation of donors will thrive in this ever-evolving landscape.

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Moving beyond the outdated one size fits all approach, they can cultivate relationship centered strategies that unlock the door to larger and more profound philanthropic contributions.

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Thus, creating greater generosity from our broader range of donors. We are so pleased to have our partner Yes and Lipman Hearn join us today.

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We will have time for questions and answers at the end. Also feel free to put your questions and comments in the chat as well.

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Let's just take a moment to reflect that. And on a quick snapshot of our most recent given U.S.A. data.

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So this data will be coming to you from the given U.S.A, 2,023, which is the longest running report on philanthropy in this country.

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This is a report that is published by the given U.S.A. Foundation in partnership with Giving Institute and Indiana University, Lilly Family School of Philanthropy.

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If you would like to purchase the report, there is a 30% discount. As a webinar attendee.

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So please just email us@infoataalfred.com. So let's just take a few minutes to take a look back in order to look forward.

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On the next slide, what we will see is despite a modest decline from the record-breaking year of 2,021, charitable giving in 2,022 remained remarkably strong reaching and impressed the 499 billion dollars.

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While this represents a 3.4% decrease in current dollars, It is crucial to note that inflation adjusted giving in 2,022 still ranks as the second highest giving on record.

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This remarkable generosity, I missed challenging economic conditions. Underscores the deep rooted commitment to philanthropy among individuals, foundations, and corporations.

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Individual giving remains the bedrock of philanthropy as we will see on the next slide, accounting for a remarkable 83.5% of all giving in 2,022.

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This includes a substantial 64%. From direct individual giving. 9% from Bequest. And nearly half of foundation giving a originating from family or individual foundations.

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So let's just take a pause. We reflect on 83.5% of all giving coming from individuals and

there's been a lot of top in recent years about who are these donors.

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So I have a quick quiz question for you. What percentage of individual giving do you think mega guests make up?

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If you can just drop that in the chat. So again, these are mega gifts which are defined as gifts of 500 million dollars or more.

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What percentage?

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Before we reveal the answer, let me just say this. I see. Okay. Alright, okay.

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We have a wide range everywhere from 2% up to 55. So let me just say this, while very large gifts from some of the wealthiest Americans reached a total of nearly 14 billion dollars.

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And 2022 it's important to recognize that these mega gifts again these are gifts that are defined as these mega gifts, again these are gifts that are defined as 500 million dollars or more represent a small percentage of total giving.

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Despite their transformational impact. These large donate donations account for only 5%. Of all charitable giving in 2022.

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This highlights the crucial role of individual giving across all levels. As it forms the foundation of philanthropy.

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Every contribution, regardless of size, plays a vital role in advancing the causes we care about. So I'm major takeaway.

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Is the opportunity to grow individual giving. It becomes even more critical now than ever. This is why we're focused on focusing on individual giving in this webinar to grow philanthropy, we must become intentional.

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About cultivating generosity. This means expanding our focus to include a more diverse and broader base. Of donor audience.

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Today, we are delighted to welcome Colleen O'grady, vice president of philanthropic strategy.

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Andrew Tai, vice president of brand strategy and customer experience at Yes and Lipman Hearn.

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As they delve into the intricacies of generational understanding. Their insightful research will illuminate the unique life experiences, values.

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And cultural touch points that shape fillingthropic propensity across generations. Thank you, Colleen and Andrew for sharing this groundbreaking research with us today.

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Before we hear from Andrew and Colleen, we like to do another quick poll. You will be able to cast your vote.

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For the answer that best represents where your organization is on its journey on engaging generational donors. So please just make one selection.

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So here are the selections. We're just starting to think about how to engage generational donors.

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How many of you are? At that place. On the journey. How many of you recognize the importance of engaging generational donors, but you haven't yet developed a strategy.

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How many are still in the early stages of developing and implementing the strategy for engaging these donors? And then lastly, your organization has a clear and effective strategy for engaging generational donors and you've seen an increase in giving as a result.

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Are we able to see some of the poll results? Tandi and Lucinda to see where folks are landing.

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All right, well, you know what, Colleen and Andrew as we look at these poll results, it looks like, We're starting from a good place.

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I think the majority of the individuals who are attending today certainly understand the importance of engaging generational donors and we have some who are just starting a large percentage and And we have a smart percentage who have already, experienced some terrific results and perhaps they can share some of those results with us throughout our time together today.

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So with that, Colleen and Andrew, I will turn the reins over to you to take us through the research and thank you again for being with us.

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Alright, thank you. And while I Pull up my screen. I'll just.

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Even the most well rehearsed version of this.

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Yeah.

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So. Here we go. There. I think I needed that to happen and now I can share my.

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Great. Really excited to be here with you all today. Hopefully you're seeing the deck as we intended it to be seen.

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Yes. Sounds good. Okay. Thank you for that intro.

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Yeah.

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This is a topic that we see becoming more and more critical and important to to try to delve into and we have a lot to cover today so you know we we will try to give the subject it's due but one of the reasons that we are so interested in it is that this phenomenon that we are living through of really advanced and improved longevity means that there are multiple generations of a single family, 3

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and 4 generations sometimes of one family in the workforce at one time. And so the previous world in which you might have a nuclear family of dependent children, working parents, and retired grandparents is no longer the world that we live in.

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We have people who are at the height of their earning power and accumulating wealth who also have obligations in multiple directions to their growing or adult children to their elderly parents.

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Sometimes they're retired themselves and so these generations are they're not monolithic and they're also don't exist in silos.

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They're in conversation with one another and they're in community with one another. So that is coloring the way we think about.

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Donor communications in this world. And so we wanted to walk you through not only some insights about each of the generations, but a framework.

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That those insights work within. We begin with a platform of understanding and there's a lot of that out there that tells us how individuals in each generation are directing their giving and how they like to transact their gifts, but that tells us about what their behaviors have been so far and not enough.

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I think about what they could do if we succeed in really appealing to their deep values, help them feel a certain way about their involvement in your organization.

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And so we're using the 5 generational subsets today as a way to model this process of understanding and then moving from understanding through things like positioning, strategy, and deploying tactics.

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So. What we see happening is once you understand what your subsets of reachable donor audiences are looking for, you are going to find that some people don't want things that aren't really a great fit.

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For your organization and others who are a good fit who you haven't yet reached. And so your job is to persuade people to change their stripes.

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And look for a different emotional outcome from their involvement with you but to make sure that all the people who do resonate with what you offer, see you, and see clearly what it is that you're offering to them.

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So this is where once you articulate what you can. Promise to your donors authentically, you'll start to tailor.

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How those people are going to see those messages and in which places they're gonna see them. And then of course once you deploy those tactics and those pieces of outreach.

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So that you're in front of each generation of donors or each individual within those generations. You'll also use.

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Active listening and analysis of how people are responding to what you're offering to them to feedback into the cycle of understanding.

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So this isn't a this isn't a one-and-done process where we reveal the magic of how you'll reach each of these 5 generations.

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In the moment, but rather a process that, that is iterative as we go.

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But we'll, we'll start with, just thinking about the definition of generations.

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We'll talk a little bit about some of the shared cultural experiences that we think shape their world view.

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Some demographic and psychographic information, a little bit about their values. As we understand them from some research resources that we have access to and then we'll talk about a little bit about the engagement, the tactics that seem to be commonly in use with those generations.

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Among the chat here, I see there's representation from. Many of these generations, I don't see too many Gen Z folks wing in and there's a couple silent generation and then it looks like the bulk of participants are boomers, gen x and millennials, which is great to see, you know, as as much variety as there is, but I also want to sort of remind people just think

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of. A sibling that you might have who is probably the same generation as you. And the way they see the world and the ways in which that might be very different from how you see the world.

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So, you know, we'll keep that as a reminder to ourselves that within each generation there are going to be things that are useful that we can use and then things where we have to say, let's take this with a grains of salt and understand that there's a lot more complexity that's under the surface.

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So starting with the silent generation, you know, one thing that we think is, of course, everyone, who thinks about the silent generation will probably first think of the fact that they were children during World War 2 and the Great Depression and they were living in racially segregated communities.

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They if they had media in their home growing up it was most likely radio until people started acquiring TVs in the fifties.

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And even when TV started to become popularized, the heroes that were being portrayed on those channels were mostly of an older generation.

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And so these people in this generation didn't exactly see themselves. Portrayed as the hero in the story.

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They were sort of damaged in between very large, greatest generation and then soon enough the very large boomer generation.

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But we saw some really interesting leaders emerging from this. Population, people who didn't have models exactly, but who became the model of a new type of way of being in the world.

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Whether it's the first people to land on the moon. Who, you know, created the Very phenomenon of being an astronaut or civil rights leaders.

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Or at least in the, in the form that we know we, we saw taken in those years.

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And another thing that we try to keep in mind is that the life expectancy when this generation was born was about 60 years of age and so people have by now wonderfully outlived this life expectancy and maybe are not in a wealth accumulating place of life, but they're in a phase where there's a risk of wealth depleting events impacting them.

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And so They might have some cautiousness financially. I don't want to dwell too long.

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I want to hand it over to Andrew. Who's going to talk through a little bit of demographic and psychographic information?

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Yeah, so a few interesting things that we found as we we dug into the data by the way you'll just to give you some some language in vernacular context here when you see percentages those are gonna be the percentage of that generation that expresses a given behavior or perception.

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You'll see also numbers that start with a one or perhaps a 90. They're sort of those are those are indices indexes.

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So basically if you see something like 1 23 that means that this generation is 23% more likely than the average general American to to do this thing or to feel this feel this way so you'll see both percentages and indices over the course of today.

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But a few things that we thought were interesting around the sandwich generation is that, you know, almost a third of them are actually widows or widows and even a slightly higher percentage of that actually live alone.

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They're also. Oh, I'm seeing that there's someone. Somebody it says that they're not able to see the screen.

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But I think that might be specific to someone. Specifically, cause I can see it.

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Does everybody? Can I get some work? I think that, okay, great. Okay, great.

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Okay.

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Cool. I just wanted to kind of make sure I was adjusting that. And that, you know, over half of them already give to charities or causes, and as sort of might make sense intuitively that about 3 and 4 of them also have a Christian faith background.

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So the interesting thing is just kind of keep not and keep a nod of this because as we go through the generations you'll see how they really differ across some of these some of these data points.

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But what we also wanted to look in was some of their personal values. And this is one of the most useful, parts of the, the the tool that we're using to get this data just so you know that we we have access to over 14,000 data points on US consumers and the US adult population as a part of our our partnership with Resonate.

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So that's where that's where this data is coming from. So the best-in-class consumer database platform out there.

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And one of the things that they that they dig into is again personal values. We're driving not only sort of how they perceive themselves but their behaviors, their thoughts and perceptions and and this is sort of really a story of continuity and inhabit right sort of like the idea of customs and traditions they value things like duty, tradition, dependability.

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And, and so that, you know, that there's, there's when thinking about the themes to kind of consider when communicating with these audiences, you know, appealing to those, to those ideas, trust and honesty and the idea of sort of like things that are stable, right?

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This is sort of a story of stability that we want to communicate with with them. The other thing that we wanted to look into was, some of their media habits and how they spend some their time as kind of makes sense to to a lot of us they this the sound generation watches a lot of television right they consider themselves to be medium and or high users of this of this medium and you can see that

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they're they're significantly lower on some of those more digital digitally forward platforms that you'll see our younger generations are using much more frequently.

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And they also are using, you know, physical newspapers much more than than other generations and still are sort of reading magazines in fact about half of them say that they you know are our light readers of magazines and and so that these you know again you'll see sort of how these patterns change over time but we wanted to kind of give you a level step by starting with this first generation so that you can see how the behaviors

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and values and things shift over the course of those generations. So now onto the boomer generation.

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Yeah, and, and so with boomers, we sort of start to see a generation where while silent generation were the ones landing on the moon and leading the civil rights movement.

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The boomers were really watching this take place and sort of navigating this new territory that was being opened up and trying to find their place in it.

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Whether they chose to sort of step back and and drop out or dive in. They this this generation as a whole lived through and experienced.

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Quite a lot of really dramatic financial abs and flows and a in the way we use computing in the workplace, for example, and they also more sort of thinking about recent years.

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Are thought to be the first sandwich generation in history. So this is a generation that is larger retired or approaching retirement while also supporting adult children who might be struggling financially and sometimes their own elderly parents who need support of one forum or another.

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And so there's a lot writing on them. They've been through a lot. They've seen a lot and they are done, you know, they're still actively involved.

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In the workplace. If they are retired, they're actively involved as volunteers. And, and pillars of the community.

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And so, we see this. Story continuing to evolve and continuing to evolve in relationship with other generations.

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But I'll sort of pass it over to Andrew for a little bit of the detail here.

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An older and about the same number are actually retired right now. You can see that this is the 40% number of giving to charities or causes has dipped from the silent generation.

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And again, you will be interesting to see those reflected in the other generations as well. It's funny to note that about 6% of them actually have grandchildren in their household you know that in addition to what Collie mentioned about some of them having some older kids that they're supporting.

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And also, you know, 6 out of 10 of them say they're savers, not necessarily spenders of money, right?

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So this is this is also reflective in the values that we found about about this generation, which again a cut similarly

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Oh, guys, I feel like I was just kicked out of Zoom. Can you hear me and see me now?

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Nope. Yeah, we can hear you now. You pause for a minute.

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Okay, apologies for that. Yes, I seem to be having some zoom problems here, but the themes to consider here are really sort of about continuing that idea of dependability and reliability, but this is sort of a story of safety, right, in security, right?

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There's a lot that they both sort of still have to do and sort of like responsibilities that they have.

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At the same time, they want that sort of safety and security that is still coming with their independence as they sort of grow into into sort of older older age.

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And in terms of their media habits, right, you're starting to see some shifts and things and right these are sort of more of them become light users of internet video for example and social media so why they aren't the heavy users of it that a lot of our younger generations are.

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They're still spending a lot of their time, by the way, watching television, and sort of reading magazines that sort of a similar clip to the, to the sound generation.

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But, but you can see the Good generation starting to embrace some of those digital and social platforms just not quite as readily as some of our younger cohorts.

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So let's move on to to Generation X.

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Yeah, and, you'll notice actually, by the way, as we go that we aren't sharing data about the types of causes that each generation seems to favor because we see data and evidence that every generation it has ways of supporting every type of nonprofit or cost that is out there.

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And so because each of you presumably works for one or another cause or nonprofit, we know that there are ways that you can reach all of these generations and that in rather than it's not a question of whether or about a question of how you reach, people within that subset that are gonna be receptive to a question of whether or not a question of how you reach people within that subset that are gonna be receptive to why you're

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offering delving on a little bit to Generation X. You know, we, know that this was a generation that had both parents working outside of the home and I saw one description that said they were one of the least parented, least nurtured generations in US history that might be an exaggeration but it sort of struck me and there was a sense in which the rest of society didn't quite know what to expect of them and

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that they felt it that there was a lot of popular media that came out at the time that was highlighting the story of.

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Of outsider status and of a sort of awkwardness that that that people were envisioning for this generation.

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This was the last key generation. This was a generation that witnessed the chaotic early years of the internet and certain outsiders like Jeff Bezos really managed to turn their startup into a success story but this generation really witness more failures than successes in that area and so their expectations got modified.

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This is also a sandwich generation in which parents are older than 65 and children are fairly young and need support and so we see this generation.

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You know, maybe a little bit alienated from the, the mandate of, success and, commercial accomplishments and diving in a little bit more to sort of a family situation.

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But I'll let Andrew say a little bit more about that.

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Yeah, and so it's the irony of this generation being sort of perhaps the least parented of the generation is that they have kids in spades right that 3 and 4 of them have children and some are over 18 and in fact 36% of them have kids in high school and our college so they're sort of getting up there.

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In ages well. And you'll see that again that number continuing to dip a little bit in terms of giving to charity our causes and that that's a 2529% for this generation.

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As they grow into their and have really developed their professional lives. And so, 15% of them actually earn more than \$150,000 a year.

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So how does that reflect into some of their values? You're starting to see some of the

things that that really popped for the the boomers and the silent generation sort of like dependability and duty and tradition aren't really sort of as valued as much and what they really sort of like aren't sort of all about are things like achievement, authority or influence.

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This is really sort of their, this is a story about a desire for balance, right, that there that this is with all the things that they have going on in their lives.

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We want to acknowledge the individual reality but also make sure that we're we're respecting that desire to them and and there's there's plenty you know we want to tread carefully when appealing to things like power prestige status power and control that like really that seem to gravitate more towards other generations but with them it's again this really the story for balance and wanting to kind of find find that balance

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and everything and it's kind of a more balanced set of values that again you'll see very different from our younger cohorts.

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And in terms of their media habits, you're starting to see a continuation basically sort of moving from TV watching of which they still sort of you know do at a probably pretty normal or standard rate to hire usage of things like the internet and your great video and radio and they're still sort of if you can see across the board they're kind of light users or a bunch of a bunch of different media types versus focusing on any

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of them in particular. Which again you'll see a differ as we get into the into the younger cohorts of which the next one is is where I'm a member of the millennial generation, which has some sort of red somewhat embarrassing part traits.

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Of the generation that I know that Colling will start talking about, but that are certainly true of people in this in this age range.

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Okay. Of course, yeah, we're, just the caveat that we're, these are generalizations or we're simplifying the story to to make it digestible but you know one thing that I think would surprise a lot of people about millennials is that this is a very large generation that was celebrated almost from birth.

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For having economic and societal power that they would collectively have just by sheer numbers. And they, this generation started to see evidence of this when I think this the story goes they embraced Harry Potter and single handedly brought about you know saved the publishing industry and there were a time and time again, this was the generation that was the force behind helping cement Facebook and later Instagram into mainstream

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culture and and then they also witnessed some you know some peoples in society and some moments that could shake people's faith that were shake confidence in the sort of older generation of leaders that they were looking to for for leadership during 9 11 and then in sort of smaller ways things like this Wild West moment of technology in their early days at the cell phone and media players and things like that.

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People saw quite a lot of change and and sorting before we all sort of settled on a model for how these technologies would be used.

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And they also experience, you know, things that, boomers experience like the crash of 2,008 they saw from a different point of view because they were maybe children in these families and witness their parents.

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Who had been working for a lifetime, saw their savings deplete and saw the rug pulled out from under.

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And so there's a sensitivity to things like home ownership and weather and how they'll be able to reach those milestones is a big topic of.

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Yeah, and you know as probably makes sense to a lot of us on this call about two-thirds of them have children which does by the way lead a solid third of them without without children and and we're starting to see a plateau of this number of giving a charity or causes and this is sort of, you'll start to see this pretty similar from Gen X to Millennials through to even Gen Z.

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About almost 10% of them are actually divorced or planning to divorce. So it's starting to think again, getting these sort of later on in life stages that they're starting to experience now in the millennial generation and a good amount of them are renters right so again I calling mentioned they they haven't necessarily completely sort of dove into the idea of homeownership.

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And the values are really, really where we see a lot of interesting things starting to pop. So you'll remember from the generation X that they and the boomers they did not really value these very much in terms of achievement authority and influence but that is absolutely what the Millennials value again like they've been told to sort of story of an empowerment story from from the very get-go with a lot of

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the technology and things that have kind of always been at our fingertips, but at any moment we could hypothetically be able to do anything.

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Right? So there's some of the themes that we want to to consider here is offering, you know, senses of appreciation and acknowledgement and recognition of what they're doing and all that they do.

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Demonstrating these over again, a comfort in taking risks and and leveraging sort of power for the sake of solving problems and you'll see this particularly with our Generation Z cohort 2 that they're sort of interested in the betterment of of society and so you know sort of inviting a sort of confident and decisive action with with these millennials is gonna be, it's gonna be a lot more.

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A lot more successful than with other generations. And you can start to see us again, no surprises here that things like internet video and social media these are platforms that they're starting to use.

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Heavier and sort of on a more regular basis. They're also still using, you know, things like, you know, using new technologies to sort of engage with types of content that we, that the other generations are also familiar with.

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The types of content that we, to sort of engage with types of content that we, that the other generations are also familiar with.

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So, you know, light users of blogs or, you know, reading newspapers on mobile apps and things like that.

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So, you know, lighting generations are also familiar with. So, you know, lighting light

users of blogs or, you know, reading newspapers on mobile apps and things like that.

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Yeah. And.

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So while the substance of the content is also obviously going to be different, the method through that which they're they're they're getting that content the method through that which they're they're getting that content the method through that which they're they're they're obviously going to be different. The method through that which they're getting that content certainly is has shifted over the course of time.

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Yeah, I wanted to just add there. It strikes me. We sometimes use tables of media usage like this in order to know where we might place ads or serve content to each of these sub audiences, but it's also really useful as though as an as a tell of where to be looking at content that this audience is also looking at.

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So if you are spending time on the social media channels and in the internet video spaces that millennials are also spending time.

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You can see sort of what the vocabulary is and what the conversations are that they're immersed in constantly.

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And yeah, it does get a little more extreme with Generation Z, which, the, age range for generations, 11 through 26 at this point.

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We're only looking at those who are 18 plus in this data, but. You know, it's, it's interesting, I think to me, the story which is still emerging about Generation The, but is that Things like social media and the abundant choice and streaming media has never been a novelty to this generation.

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It's been sort of part of the fabric of the world since they were born. It's ubiquitous as water and sometimes overwhelming for them.

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So the idea that there was a world when this didn't exist that was Maybe. You know, not so stimulating.

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They don't have that comparison point. And so they're living a lot of their lives online.

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They put a lot of value on social proof and conformity to the norms that are ever-changing, but they also struggle to maintain a social connection and to feel an enduring connection especially with something like COVID disrupting that connection during a really formative moment in their lives.

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And they're also consuming content in ways that are kind of baffling to people that are, you know, in my generation and others, you know, they're looking at back catalogs of content that, you know, might be.

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Surprising to hear is,

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Is really of interest to them.

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Yeah, and there again, we're seeing some interesting trends here where you're finding like 13% of them, for example, have moved back in with their parents sort of like already going through multiple stages to get back to that.

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That place 5% of them have grandparents in the household. Again, I mentioned this earlier, but again, a solid 3 out of 10 of them or so give to charity or causes so give to charity or causes sort of similarly to our genetics and, sort of similarly to our genes, sort of similarly to our genetics and millennial, sort of generations as well.

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Sort of similarly to our genetics and millennial, sort of generations as well.

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A little under a third so their personal values here, right? This is sort of becomes a story again, kind of like a maximized story of achievement and stimulation, the idea that there's just excitement is kind of their number one priority.

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Again, you can see some of these numbers pop. So 194 for cheap means that they are 94% more likely than than the average sort of like American, 2 because we are working with US populations by the way with this data.

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I should have caveat that earlier, but 94% more likely than the average. American to value achievement, 88% more to value influence and 84% more for stimulation.

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So this idea of social proof and making sure that things are visible. And visible to others and so the empowering them to be able to again show people around them and promise adventure, inventiveness, excitement and variety and the ability for them to then share that with others is very important to this to this generation.

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And in terms of their media habits, as you can tell that they are it's worth noting by the way that while most of these generations sort of aren't completely sort of one or the other channel lies in terms of their media habits.

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You'll notice that there, you know, most of them actually are light users of television, but they're heavy.

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Media usage is really being used with social media and internet video. So it's just worth noting that they are sort of getting a lot of different different types of content in different ways even if they are spending a whole lot of their time on this guy.

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Scrolling through feeds and things like that so which leads us into you know a conversation about oh great like what do we want to do so while we want to spend most of our time kind of giving you an understanding of some of the insights that we were learning about these different generations.

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How do you go about putting that into practice? So that one of the things that we wanted to talk about within the world abstract and kind of taking what we learn and putting together a positioning is a positioning exercise, right?

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What is the promise to your to your supporters? So one of the helpful templates that we found when sort of developing these is what you'll see up top here.

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So it sort of breaks down a positioning statement into sort of components that the help you sort of understand what that story is both rationally and emotionally to the certain people

that you're typing.

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There that you're appealing to. So you start with something like 4 and then describe your sort of target audience in their situation.

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Of like your organization is the, how, how does one contextualize the category of what your organization provides that offers.

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These tangible sort of differentiators and benefits that ultimately help someone feel an emotional benefit. So for example, for Apple, that might will be for highly connected fast-paced people who are frustrated by the annoying complexities of technology.

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Apple is the consumer electron electronics brand that offers simplified technology to help you feel smarter so you can do more with every device.

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We've got another example here at the bottom. So again, for, for, some supporters, we'll redact the, the organization here, but for people who feel disheartened by slow progress in the fight to preserve species and habitats, blank is the environmental nonprofit that offers evidence of what works and plans of action informed by indigenous knowledge in Western science.

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And ultimately what that helps them feel is optimistic and energized about containing climate change. So again, it will have it on here on this next slide.

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And you'll have this to take away with you. But again, might be a nice framework to help you think about, okay, based on what you're learning.

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What your audience needs, how might you sort of position your brand to your supporters? Potential supporters in a way.

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That kind of differentiates you in the marketplace.

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Yeah, and for people that have worked in the nonprofit sector for a long time, you'll notice that This does forefront the purpose of the mission as much as it forefronts the way you want people to feel as a benefit of being part of your organization and of giving to your cause.

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So that's intentional and that's meant to try to. For some thinking about, the way it should feel to be part of a solution like this rather than simply putting the, you know, the, service population in the forefront.

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Or the topic because then you lose the ability to really differentiate yourself against a lot of other options that might be doing comparable work in your sector.

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So what we envision or see happening once you have some understanding of what it is that's moving to your audiences and you have a positioning statement that our articulates what it is you are comfortable committing to and promising to your audiences.

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We recommend creating something that we call a journey map which takes takes you takes you through thinking how an individual might move from the stage of just becoming aware of an issue that they might want to be part of solving.

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And renewing their giving. So some things that you would think through as you're creating a journey map like this are what is the individual doing?

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Physically and what are they thinking about during moments when they might see your messaging? Right? Are they consuming a lot of television and might have some spare time on their hands and would love to have like a companion piece that they could be you know enjoying while they're watching TV.

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What tactics can you use to make sure this person sees what you have to offer in these moments, right?

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Is it if they're TV watchers, you might think about a direct mail piece that they could have, other magazine stand in some generations or maybe alternatively it's the social media tactic that you're that you're introducing so that you're visible.

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And then finally, how will you frame what it is you have to offer so that it resonates best with that person's values and motivators.

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So if you're you know, using a certain channel to reach a certain demographic. You wanna be using language that it's gonna resonate with what we know about those values.

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We put together a couple of example journey maps here. Not for every generation, but for 2 that we think will help illuminate the way these.

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Journey maps can be tailored. Our silent generation, we could imagine a person seeing an issue that's covered in a local news story and then learning of an organization.

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Be an OP-ed, maybe in the news around that same time or from a trusted source. Be a word of mouth, just as a sort of first discovery of that organization.

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They might have a moment when they can discuss with their family and their social circles here further, people representing the organization and speaking, favorably about it and with information that's trustworthy.

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They will probably research your organization online, not by name, but by keyword. And so things like supporting keyword searches.

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With advertising is a smart tactic. They might Again, go through this process of.

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Seeking information, evaluating information, making decisions as much as you can. Embody values of trustworthiness, of giving people.

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The freedom and time and space to make a informed decision so they don't feel rushed that they feel the information is straightforward and clear.

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To them as they go through each stage in the process. They are gonna want to have an immediate confirmation of any transaction, direct and polite thanks that comes separately.

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They might appreciate things like, newsy briefings and things that support their ability to participate in these ongoing conversations with their communities so that they can uphold that self-perception of being a, you know, having a strong.

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Compass and and being an informed participant in what's what's happening in the world and if there is a swag that you're gonna offer to them, make sure it's something practical that you know doesn't feel like it indicates a waste of resources.

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Monthly auto renews might be an appealing option to them as long as the terms are clear and they can trust you to respect and seek out their wishes as far as renewing and things like that as they go.

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So to contrast that, this is a journey map that reflects more of what a gent the individual might go through and the first 7 steps of this we could envision all happening within a 5Å min period without a relieving Instagram.

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And this is something that we see as a sort of expectation of people in this generation that once they're doing whatever it is they're doing on Instagram, they will not, they don't want to have to leave that app.

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So there's a lot of in-app technologies and capabilities that allow us to keep the conversation contained and intuitive for somebody that's using it without interrupting the flow and so that comes from everything from using the vernacular that's current and are relevant and resonating in that moment.

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To the use of whatever the most up to date interfaces and technologies whether it's a donation link sticker that's available on an Instagram.

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Story or some other thing that might be. These things are always evolving and changing. And then we also see.

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A lot of value of giving them evidence of social proof, which is peers that are participating in this type of a giving opportunity.

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Hashtags and, and, reposts that would be visible to them on their for you page or in their in their peers channels.

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This is all getting into the weeds a little bit of, social media tactics, but.

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We think that there's a.

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There's evidence or. Yeah, validity, I guess, to the idea of. Dedicating resources if you do know that you're going to be reaching out strongly to Generation B, making sure that you have an insider or someone who's sort of deeply immersed in this.

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Area so that the the speed with which this generation adapts and expects their community to adapt to these tools.

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They're sort of keeping up with it.

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Alright, so let me pass it over to Andrew to talk a little bit about deployment.

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Yeah, we know it's key obviously that once you have an understanding of your audience that you kind of need to put things out in the market and test them, right?

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And, and one of the best ways of doing this and this is an offering that we have for many of our clients as well as is being able to track performance as well as is being able to track performance in real is is being able to track performance in in real time you know to use things like digital metrics and KPIs, you know, to use things like digital metrics and KPIs to to measure sort of

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things like digital metrics and KPIs to to measure sort of things like engagement, how are you reaching, click through, to measure sort of things like engagement, how are you reaching click through rates, user sessions and like average time on page.

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These, these are you reaching, click through rates, user sessions and like average time on page. These, these are metrics that give you a proxy for, sort of how, how you're doing sort of in the top in the middle of the funnel.

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And then obviously as you get down into your sort of acquiring your sort of supporters and you requiring emails and you can also track things like the brand sort of lifting and how the brand is perceived.

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Over time, with sort of, you know, pretty extensive, brand lifts, survey.

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So there's just one of the, what we want to sort of mention is that across the customer journey, there are sort of different proxy measurements that you can take both digitally both in terms of your marketing but a lot of other things that you can track in order to understand where are the levies you do and don't need to pull where where all on that journey might you be sort of like coming up short?

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Where are you performing well? And so, and so yeah, so just just noting the tracking, frackng things in sort of a real time sense as much as possible.

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It's a great way to to go about understanding how you're how you're executing upon you know communicating with your different supporter audiences so with that, yes, I think it's time for questions.

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And, yeah.

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Yeah, I think, think at this point I can I can stop sharing and we can go to a full view.

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Is that right Brother?

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Yes, yes. Well, Colleen and Andrew, thank you so very much. There there are so many takeaways, but one of the things that really resonated with me when you started talking about the journey map and you talked about feeling.

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How the how the donors are feeling. So again, for me that translate into building stronger and deeper, deeper connections, right?

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Because we know that when it comes to decision-making, 80% of decision-making is based on emotions.

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And the other 20% is based on rationale. So now we rationale why we are responding the way we are.

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And so one of the questions that we have in the chat was I'm wondering about if there is value in segmenting each group.

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Andrew, I think you touched on that these groups aren't monolithic. Yes, you know, if you're a baby boomer, does one size fit all or should we look at segmenting within baby boomers in order to then define specific strategy.

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Based on that larger group. Versus having one appeal fitting all boomers. Any feedback on how we might look at segmentation within the cohort groups.

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Yeah, I think that one of the things that you'll need to do is kind of understand. You know what are the sort of key differentiating factors about what your who your brand is that you can then sort of use to understand and break down the segments even even a bit more.

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So for example, if you know that you want to sort of play in a certain territory you could sort of go in and slice with the with these data sources, you could sort of go in and slice with the with these data sources for example you say okay with in this generation I want to know who might really value something like, you know, courage or who might sort of within a certain sort of cohort be, you

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know, particularly able to, you know, who might care about a certain cause or whatever. There's There's basically like the the looking at it as a generational lens is just sort of step one and then you kind of want to understand that great like what are the then commonalities across generations that you can appeal to based on what your whatever it is your brand kind of stands for.

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And so taking a look at sort of like institutionally and organizationally, like what does your brand stand for and then understand kind of who within the generations also sort of valued those same things and you can marry things that way.

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I don't know if there's anything else that you wanted to say, calling. It was a bit of a broader answer to that.

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Yeah, I think that's I think that's I would concur. It's it's looking at generations as the first lens or one first lens and then maybe dividing up even more granular detail as we go, whether it's dividing into younger boomers and older boomers or, married with children, Gen X versus unmarried or child free gen x.

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And thinking about things like life stage, about you know, other kinds of financial concerns and demands that they have on, on their plate as well, which gets to one of these other questions that I see there, which is to do with why silent generation is observed to be giving more or at least a higher percentage of them are giving compared with G and.

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I think that, is attributable to a sort of, Well, it was interesting to me that Gen Z is actually giving at a higher rate than, the Millennials and Gen X and sometimes that has to do with their perception of the disposable income or the amount of resources they have that

feels, important to give and also they, the amount that they're giving to each of these

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causes isn't reflected in those total numbers. So it might be that while Boomers and Gen X are giving at a lower rate, those in those populations that can give and do give are getting larger gift.

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So those data points I think are a starting point and should make us ask questions like you've asked and try to take a little bit deeper.

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Thank you. You know, there's a lot of research out there about generational giving and it's really interesting that yes, Anne Lipman-hern took this approach.

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Could you just this is because this is a slightly consumer based approach to looking at the intersection. Between consumerism and philanthropy.

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Yeah, for sure.

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Could you just touch on why you chose to look at it from that perspective and what you want to make sure that our audience takes away as an outcome and result.

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Yeah, thank you. I, you know, I think We always try to train ourselves to come to the conversation thinking about.

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What does that individual in the target audience see themselves as and they don't necessarily see themselves first and foremost as a donor, even though you as an organization might see them that way, they see themselves as, I'm a parent, I'm a community member, I'm someone who has career goals, I'm someone who enjoys this type of food and this type of music and this type of you know

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culture and then if and also who has a certain value set and then if that value set can be advanced by giving and by participating in the work of a nonprofit, then that is going to be so much more of a lasting and enduring relationship then if we only approach them as people who might make a financial transaction of a gift to us.

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Yeah.

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So we tried to look at the holistic world that they're in and all the places they live and work and, things that they're thinking about so that we can just make ourselves present in those spaces.

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Yeah, that's great. Certainly from my years of being in this in this field and in this sector, I remember the early days where.

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Doing this for a was more of an art and now I'm so happy to see more data to support some of the science to then lean into strategy.

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I know that we are at time. Anything else, Colleen and Andrew, you want to make sure that our.

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Participants take away as we wrap up our time together this afternoon.

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Okay.

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Okay. I just want to say thank you to you Brenda for hosting this series and also to all of our colleagues that work in nonprofits.

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Yes, and, and, and works only in the nonprofit space and we are really privileged to be able to work with people that think about this type of thing and we are really privileged to be able to work with people that think about this type of thing every day like we do and Thank you for your work.

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Thank you for being here today.

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Yes.

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This was it was a really great opportunity and again like we while, it's just step while I'm looking at things from a generational point of view as always good to keep context because the People like me is the largest way that we sort of make those emotional decisions to your to your point Brenda right it's like is this something that people like me do and the generation that you're a part of is a

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Yes.

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hugely influential about what makes those emotional decisions. So it's a hugely important thing to start with.

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Well, thank you, Colleen. Thank you, Andrew. Thank you. Yes, Anne Litman-hern. Thank you.

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Lucinda, you have a few words to just kind of close us out. And thank you to our participants today.

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Yes, agreed. Thank you to everyone who joined and for the rich dialogue in the chat and for the questions.

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And I echo, Clean, Colleen and Andrew, thank you so much. This was wonderful information.

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A few reminders to wrap us up. If you would like to receive the 30% discount off of purchasing your given U.S.A. book.

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Send us an email info at alfer. Com and we are happy to provide that link for you to be able to do so.

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We did. Record today's session. And we will be sharing that out. So within 24 h, you'll receive an email with the recording, the slides, and the worksheet.

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We are happy to share that with you as well and you'll have that in your inbox soon.

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Once we conclude, you will be prompted to complete a really short survey. Please consider

doing that.

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It's about 4 questions that'll help us plan our future webinars. And then finally, if you had a question that we didn't have a chance to answer, we would love to continue the dialogue.

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So please email us again@infoatoffer.com. We're happy to continue this conversation and want to make sure all of your questions have been answered.

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So with that