



MIND THE GAP:

HOW INCLUSIVITY AMONG GENERATIONS OF DIRECTORS & DONORS BUILDS A STRONGER, MORE SUSTAINABLE ORGANIZATION

SHAWN CALLAWAY, CHIEF EXPERIENCE OFFICER & OWNER



UNDERSTANDING 6 GENERATIONS OF GIVING: WHO GIVES THE MOST AND HOW THEY PREFER TO GIVE

- **The Silent Generation (1925-1945)**
- **Baby Boomers (1946-1964)**
- **Generation X (1965-1980)**
- **Millennials (1981-1996)**
- **Generation Z (1997-2012)**
- **Generation Alpha (Born after 2012)**



THE SILENT GENERATION (1925-1945)

- 88% give to charity, donating an annual average of \$1,367 across 6.2 organizations
- 11.8% of the US population and account for 26% of total US giving
- Preferred contact methods: Voice calls, direct mail
- Preferred donation methods: Direct mail and voice calls



BABY BOOMERS (1946-1964)

- 72% give to charity, donating an annual average of \$1,212 across an average of 4.5 organizations
- 23.6% of the US population, but account for 43% of total US giving
- 24% of Boomers say they were prompted to give an online donation because of direct mail they received
- Preferred contact methods: Voice calls, Text or SMS messaging, email, social media posts
- Preferred donation methods: Online giving



PERCENTAGE OF DONORS INFLUENCED TO GIVE BY DIRECT MAIL

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	53%	60%	53%
2022	45%	59%	52%	52%

PERCENTAGE OF DONORS WHO PREFER TO GIVE BY MAIL IN RESPONSE TO DIRECT MAIL

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	26%	37%	49%
2022	23%	30%	26%	41%

GENERATION X (1965-1980)

- Average annual gift of \$732 across four charities
- Lead in annual volunteer hours served
- 20.4% of the US population and account for 22% of giving in the US
- Email prompted 31% of online donations made by Gen Xers
- Preferred contact methods: Voice calls, Text or SMS messaging, email, social media posts
- Preferred donation methods: Online giving



PERCENTAGE OF DONORS WHO USE A SMARTPHONE

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	95%	87%	70%
2022	91%	93%	96%	87%

PERCENTAGE OF DONORS WHO USE A DESKTOP COMPUTER

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	44%	53%	63%
2022	37%	36%	38%	52%

MILLENIALS (1981-1996)

- 84% give to charity, donating an annual average of \$481 across 3.3 organizations
- 25.9% of US population but account for only 11% of giving in the US
- 47% of Millennials gave through an organization’s website in 2016
- Preferred contact methods: Text or SMS messaging and social media posts
- Preferred donation methods: Online giving



ONLINE GIVING BY GENERATION

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	70%	61%	57%
2022	76%	81%	69%	61%

GENERATION Z (1997-2012)

- Prefer smaller, grassroots causes and organizations
- Donate their time and spread the word on social media
- 59% of Gen Zs are inspired to donate to charity by a message/image they saw on social media

PERCENTAGE OF DONORS INFLUENCED TO GIVE BY SOMEONE ASKING VIA SOCIAL MEDIA

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	36%	35%	15%
2022	42%	37%	27%	11%

(Note that it was someone asking via social media and not the organization making the ask).



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PERCENTAGE OF DONORS WHO WOULD WELCOME A TEXT AT LEAST MONTHLY

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	47%	41%	16%
2022	80%	61%	46%	23%

PERCENTAGE OF DONORS WHO WOULD WELCOME A DIRECT MAIL LETTER AT LEAST MONTHLY

	Gen Z	Millennials	Gen X	Boomers
2016	N/A	50%	35%	27%
2022	70%	64%	44%	20%

GENERATION ALPHA (BORN AFTER 2012)

- Early signs indicate a focus on global issues and are more aware of world's challenges at a younger age
- Parent's values and online engagement will shape their charitable giving



LIKELIHOOD TO GIVE USING A QR CODE

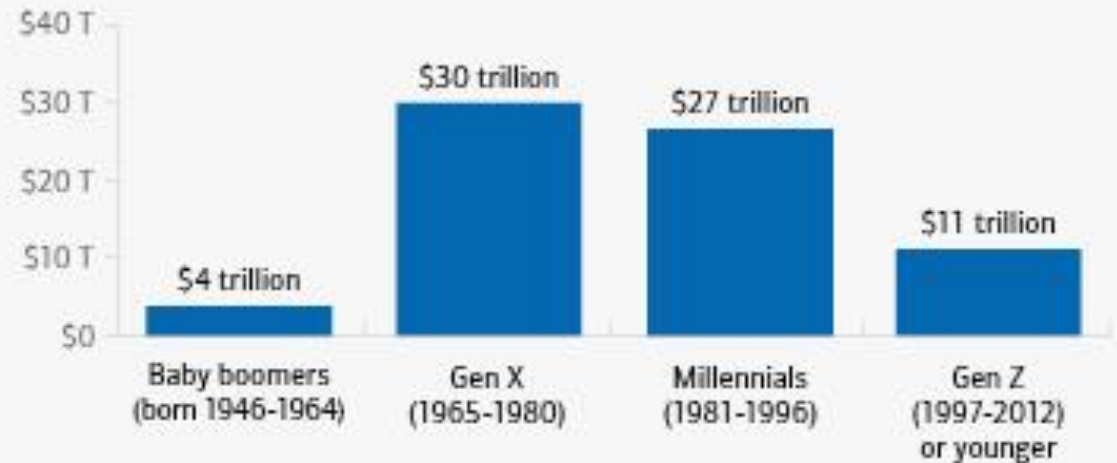
Gen Z	Millennials	Gen X	Boomers
47%	46%	26%	6%

SHOW ME THE MONEY! WEALTH TRANSFER 101

- The greatest generational wealth TRANSFER in the history of the world is already underway:
- \$84 TRILLION will pass mostly from Silent Generation and Boomers to Gen X, Millennials and Gen Z
- \$12 TRILLION will find it's way to Philanthropy:
 - Foundations
 - Donor-Advised Funds (DAF)
 - Impact Investing
 - Personal Direct Action

By the numbers: The Great Wealth Transfer

Estimated wealth to be inherited through 2045, by generation:



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Wealth Transfer vs Foundational Giving



IN 2022, BANK OF AMERICA FOUND THAT PEOPLE:

40+ ARE MORE LIKELY TO GIVE THROUGH:

- Donor-Advised Funds (DAF)
- Charitable Trusts
- Family Foundations

YOUNGER DONORS:

- Direct Giving
 - Including Direct Involvement
 - Participation in Nonprofits Work

	2016	2022	Inc/Dec	%
Gen Z		31		
Millennials	37	36	-1	-3%
Gen X	30	28	-2	-7%
Boomers	41	21	-20	-49%

GENERATIONS SERVING ON BOARD OF DIRECTORS

#1 RELATIONSHIPS MATTER

- Several Components define Positive Work Relationships
 - Mutual Respect
 - Shared or Understood Responsibility
 - Accountability on both sides of Relationship



GENERATIONS SERVING ON BOARD OF DIRECTORS

#2 MISSION, MISSION, MISSION

- Mission-driven organization is the second most important factor
 - 87% of respondents were committed to the mission of their organization
 - 94% reported that they knew the mission of the Organization
 - 90% reported that they understood that mission
 - 77% reported they believe their work supports their organizations mission and is important to the success of the organization



GENERATIONS SERVING ON BOARD OF DIRECTORS

#3 CLEAR SYSTEMS SUPPORT GOOD ORGANIZATIONS

- Transparency and input into Decision-Making
 - Only 47% of respondents indicated that they had input into choices in their organizations
- Leadership Skills Training
 - 79% said that external training is important to developing leadership skills
 - 67% said that internal training is important to developing leadership skills
 - 48% said that internal mentorship was key



GENERATIONS SERVING ON BOARD OF DIRECTORS

#4 RECOMMENDATIONS:

- Integrate support for leadership development, applied skills-building, and opportunities for advancement into the daily work of your organization
 - Develop Shadowing Program or Peer Support Groups
 - Evaluate Directors on an annual basis
 - Challenge harmful stereotypes
- Fully Integrate Leadership Development, use understandable and consistent decision-making processes and communicate preferences and opportunities openly and clearly
 - Establish clear measures of job success.
 - Be specific about what type of commitment is expected over how long a period of time
 - Respect Bondaries
- Different Leadership structures can support broader opportunities for growth and developing leaders
 - Shared models of decision making
 - Encourage the development of outside partnerships and relationships





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