As you plan for this year’s campaign, it is important to have access to the latest workplace giving trends, donor research and best practices in campaign management. Below is a collection of useful data presented to help you ensure effective donor communications and successful donor engagement throughout the campaign.

**Workplace Giving Today**

Over the last decade, the workplace giving climate has changed significantly. Most recently, a tumultuous economic climate has affected both how and why donors give. While there are many trends, it is important to note the following five:

- Donors care about the impact of their gift.
- Donors increasingly place the same value on a monetary gift as they do their time.
- Donors prefer online systems to make donations.
- Donors are increasingly giving to international causes, making it the fastest growing segment of philanthropy, both corporate and individual.
- Donors want choices in giving, which increases participation and dollars raised in workplace giving campaigns.

**Donor Trends**

Every company is different as are its employees. The good news is that extensive research has been conducted to understand common themes and differences in donors and what motivates them to give. Below is a snapshot, referencing data from five different sources, of these conclusions focusing on education, income and age. This snapshot can help determine how to best engage the workforce at your company.

**Education and Income**

- Employees with a college degree tend to give proportionately more of their income to charity than those without a college education.
- More educated employees respond to the issue of equity: “helping those with less” and giving to international causes.
- Employees earning less than $50,000 annually respond to appeals involving the basic needs of people affected by poverty.
- Employees earning between $50,000 and $100,000 are motivated by a desire to create a better world.
- Employees earning $100,000 or more annually are moved by the desire to help the less fortunate and to improve their community—both local and global community.

**Age**

Most workplaces have three generations of employees. Baby Boomers represent 43% of the American workforce, Generation Xers represent 21%, and while all Millennials have not even started working, the ones who are working...
already represent 27% of the workforce. Below is a deeper look at two generations: the Baby Boomers and the Millennials.

**Baby Boomers (born between 1946 and 1964)**

As 76 million Baby Boomers have begun to leave the workforce, the United States is experiencing the most dramatic economic and demographic changes in its history. For the first time ever, we are facing a mass retirement movement that will affect the workplace. However, Baby Boomers remain a vital component of workplace giving campaigns. Below are some key facts to consider when engaging Baby Boomers in your campaign.

- Baby Boomers are nearing retirement and as a result are more intently focused on the activities outside the workplace that matter most to them, including charitable engagement.
- Baby Boomers control over 80% of personal financial assets and more than 50% of discretionary spending power.
- They are “top spenders” on new cars, cruises and charitable donations.
- They are comfortable with the Internet and making purchases and donations online.
- They grew up in the 1960s, a decade of heavy advertising, and as a result are very selective about their choices.
- They tend to be more liberal, having grown up in two decades of intense social change.
- They are using e-mail, social networking sites and online retail outlets regularly.
- Of households headed by a Baby Boomer, 69% gave to charity, and the average annual total contribution was $2,613.

**Millennials (born between 1982 and 2001)**

There are about 80 million Millennials currently in the workforce. As a result, they represent a powerful new wave of potential workplace donors. Recent surveys provide a portrait of this age group that runs contrary to the widespread notion that Millennials are not active, charitable donors. On the contrary, studies show that Millennials aim to contribute to the greater good. Below are some key facts to consider when engaging Millennials in your workplace giving campaign:

- Due to the rise of social networking and other technological advances, Millennials tend to be peer-oriented.
- Expression, acceptance and immediate gratification are highly important to this generation.

*Note:* Generation Y, also known as the Millennial Generation (or Millennials), Generation Next, Echo Boomers describes the demographic cohort following Generation X. There are no precise dates for when the Millennial generation starts and ends, however, commentators have used birth dates ranging from the mid-1970s to the early 1990s.

The Millennial Donors Report 2011 found rich and interesting data on how and why Millennials give, how much they give, and what types of communication they prefer:

**How and why they give…**

- 93% donated to nonprofit organizations in 2010
- 63% reported giving to three or more organizations
- 85% identified a compelling cause as the reason they donate
- 2% identified celebrity endorsements as a motivating cause to donate
- 58% said they make charitable donations online
- 85% reported that the greatest motivation to giving was a compelling mission or cause
- 70% said they trust organizations that report on how individual donations make a difference

Millennials also reported that they are most likely to give to a compelling mission or cause represented by an organization they “trust,” and that trust is often established by a personal connection. Volunteerism was high among respondents (79%), and surprisingly, only a small percentage reported giving through social networks.

**How much they give:**

Because the majority of Millennials and even Gen Xers (born 1965 to 1980) have lower incomes than their parents and grandparents, they tend to give smaller amounts of money to charitable causes, whether secular or religious, the study found.

The most current data from the Center on Philanthropy Panel Study found that 33% of households headed by a Millennial gave, and the average total contribution was $557.

**How they communicate…**

- 91% of Millennial donors are at least somewhat likely to respond to a face-to-face request for money from a nonprofit organization, with 27% being highly likely to respond to such a request. Only 8% are highly likely to respond to an e-mail request.

- Most Millennial donors say they would be likely or highly likely to give if asked by a family member (75%) or a friend (63%). Only 38% would be likely or highly likely to give if asked by a co-worker.

- Although only 49% gave online, 58% would have preferred to give that way.

- 72% of Millennial donors said they’d be willing to communicate with friends and family about ways to be involved in an organization they support.

- 86% want updates on programs or services of the organizations they support, and 55% want information about the organization and its financial condition.

- 68% want information about volunteer opportunities.

- E-mail is Millennial donors’ preferred communication method, with 93% of respondents favoring it for receiving information from organizations. Facebook and print media lag behind at 24% and 27%, respectively.

- When a Millennial donor uses technology to learn about a nonprofit organization, Google is the donor’s first stop, with 86.4% of respondents citing the search engine. Seventy-two percent rely on email, and 51% use Facebook to find information on organizations.

**Opportunities for your campaign**

As noted in the previous section, there are diverse attitudes and motivations among donors. To reach donors in any workplace giving campaign, it is important to customize messages and the tactical approach for reaching each target audience.
Baby Boomers

• Highlight their role within the organization and emphasize their leadership in the company and the campaign.
• Emphasize the goal of helping the less fortunate in their communities and around the world.
• Don’t ignore their online engagement potential.
• Be authentic. Transparency and accountability are of vital importance to Baby Boomers. When communicating with them, it’s important to state the facts clearly, concisely and consistently.
• Use lots of beneficiaries’ and supporters’ testimonials and photos and encourage them to champion the organizations with which they are involved.

Millennials

• Provide them with ample opportunities to participate in the campaign by volunteering as well as donating. Give them specific opportunities to lead activities in the campaign and champion causes important to them.
  › Consider a peer-to-peer campaign program that engages them in social solicitations among their friends at work.
  › Capitalize on their willingness to communicate with friends about the campaign and their favorite charities by providing them with messaging and easy methods to share information, preferably using the company/campaign intranet site.
• Provide events that offer face-to-face meetings with charities.
• Make your giving site easily searchable for charity information: engagement opportunities, stories, videos, and program information.
• Use less formal and more conversational tones when communicating with Millennials, remembering that for them, engagement and open dialogue are critical.
• Show donation results.
• Plan for a long-term return on investment for relationship-building efforts with Millennial donors rather than a quick result.
• Develop a multi-channel approach to communication and solicitation methods, recognizing that technology is a tool not a solution.

For all donors, it’s important to:

• Provide employees a broad range of charitable choices.
• Leverage the resources of your charity partners (e.g., videos, emails, collateral) to undertake donor outreach. Permit charity representatives to reach out directly to employees in order to act as “champions” for their organizations throughout the duration of the fundraising campaign.
• Emphasize any matching donation that your company may provide.
• Provide digestible information for the donors so they can stay informed without getting overwhelmed.
For more information on workplace giving best practices, please contact:

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v GivingUSA Foundation, Multiple Giving USA reports were referenced and retrieved from: www.givingusa.org.

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