



*Today's Challenge Is Generational*

# **Key trends in alumni relations and fundraising**

# Who Are We?

## Brian Gawor

Consultant, JGA (Johnson, Grossnickle & Associates)

### BRIAN GAWOR

#### THE EVOCATIVE AND ENTERTAINING MAGICIAN

Magicians are driven to entertain and cause others to get excited and by a need to innovate. They make incredible things happen, tapping into boundless potential to bring to light what others thought was impossible. Their insight into what is possible infuses them with the enthusiasm and comfort to pursue and enact change. A Magician's flair for showmanship leads them to playfully dramatize the extraordinary act of transformation.

#### → LEADING ARCHETYPES ←

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#### Cheerful & Enthusiastic

Driven to entertain and cause others to get excited. Delivers fun and the desire to amuse and uplift. Values energy, playfulness, and enjoyment. Causes people to feel exhilarated and happy.

11

#### Brilliant & Transformative

Driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.

10

#### Creative & Imaginative

Driven by self-expression and artistry. Delivers something new that encourages creativity. Values originality, ideation, and new concepts. Causes people to feel constructive and expressive.

17

#### Adventurous & Inquisitive

Driven by the quest for discovering the unknown. Delivers progress and a thirst for knowledge and exploration. Values investigation, curiosity, and trailblazing. Causes people to feel intrigued and emboldened.

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#### Powerful & Assertive

Driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power, influence, and accomplishment. Causes people to feel confident and in control.

9

#### Resilient & Tenacious

Driven by overcoming challenges through grit and determination. Delivers surprising strength, perseverance, and toughness. Values fortitude and hard work. Causes people to feel triumphant and inspired.

## Scott Ochander

Partner, Chief Leadership Strategist, Carnegie Higher Ed

### SCOTT OCHANDER

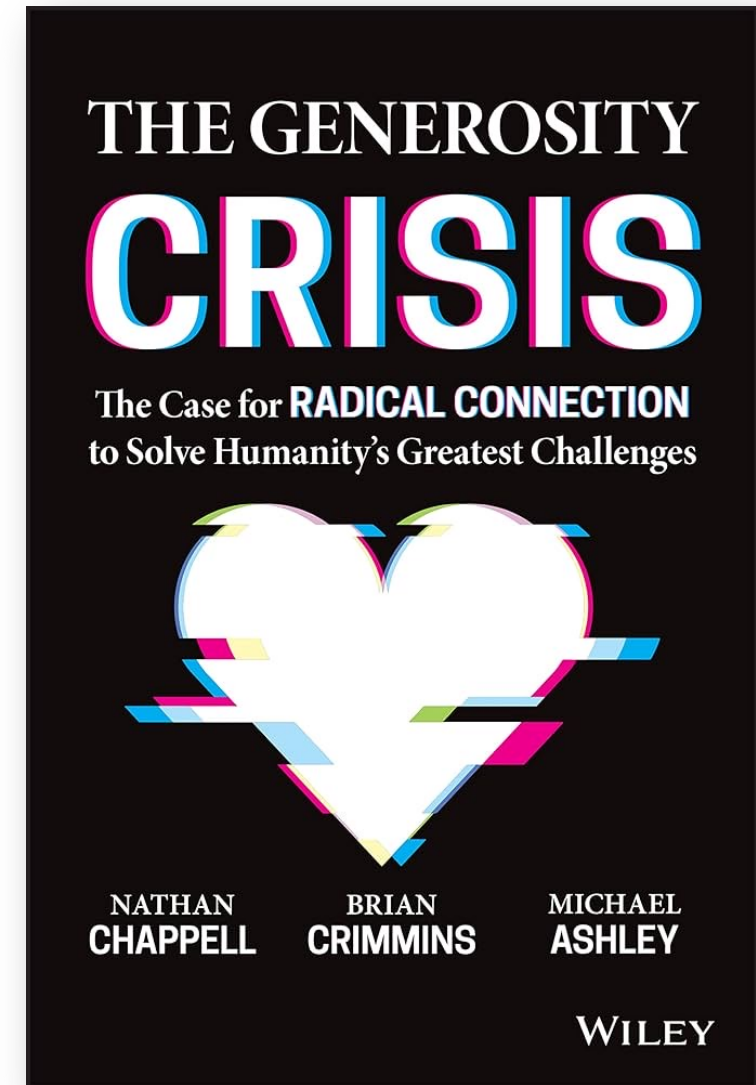
#### THE INDUSTRIOUS AND CURIOUS TRAILBLAZER

Trailblazers are driven by the quest for the unknown and by growth and being frontrunners. They are explorers at heart as they courageously break new ground to pursue the promise of what might be. They balance their inclination to be introspective and inquisitive with an enterprising spirit and willingness to take charge. They are as theoretical as they are ready for action, and are apt to inspire others to join them on their quest. Exceptional and ambitious scouts, Trailblazers are the first to lead brazen new initiatives all the way from idea to reveal.

#### → LEADING ARCHETYPES ←

# Our donor base is declining?

- Less than half of households now give to charity, down from two thirds 20 years ago.
- Individual giving declined by over 6% according to Giving USA 2023.
- Numerous reports show giving declining by younger people and among lower-income households.



# The financial and charitable power of Millennials and Gen Z



**Millennial average net worth doubled during the pandemic.**  
*Most is in real estate:  
1/3 of wealth.*

*Sources: Bank of America Study on Philanthropy*

**\$33 Trillion**

**Purchasing power of Gen Z**

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**81%**

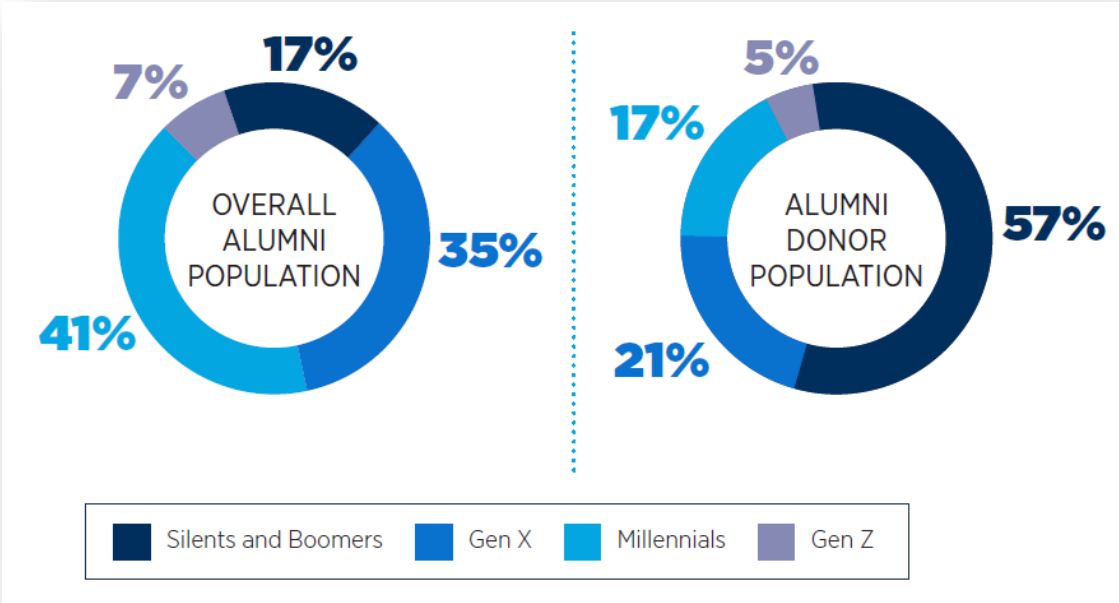
**Gave to a charity in 2021**

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**55%**

**Say issues matter more than the organization.**

# Rising Generations Have Different Giving Preferences



Source: RNL, as published in 2024 National Alumni Survey

## TOP THREE TYPES OF CHARITIES SUPPORTED BY GENERATION

	2016	2022	Inc/Dec	%
<b>Gen Z Donors</b>				
Places of Worship	N/A	\$239	N/A	N/A
U.S. Health/Medical	N/A	\$107	N/A	N/A
Environmental	N/A	\$85	N/A	N/A
<b>Millennial Donors</b>				
Places of Worship	\$436	\$300	(\$136)	-31%
Faith-based Orgs	\$106	\$243	\$137	+130%
Nonprofit Hospitals	\$31	\$157	\$126	+406%
<b>Gen X Donors</b>				
Places of Worship	\$737	\$432	(\$305)	-41%
Faith-based Orgs	\$105	\$159	\$54	+51%
U.S. Health/Medical	\$94	\$144	\$50	+53%
<b>Boomers Donors</b>				
Places of Worship	\$1,190	\$996	(\$194)	-16%
Education	\$343	\$523	\$180	+52%
Faith-based Orgs	\$155	\$307	\$152	+98%

From Giving USA Special Report: Giving By Generation

# Our donor base is declining?

**68%**

make charitable gifts  
to any nonprofit

**51%**

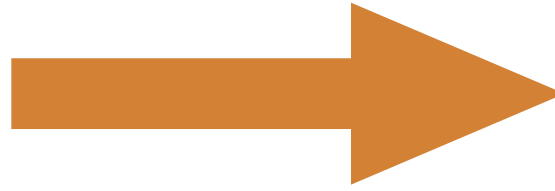
volunteer with  
any nonprofit

**20%**

rank their alma mater  
as a top giving priority

*Source: RNL National Alumni Survey, 2024*

## The OLD Way



## The NEW Way

**LOYALTY**

**RELATIONSHIP**

**NETWORK**

**IMPACT**

**IMPACT**

**NETWORK**

**RELATIONSHIP**

**LOYALTY**



The Underlying Challenge in the Data is:  
**Engagement**



The case for engagement:

# The worst fundraising day of the year was the best day ever...

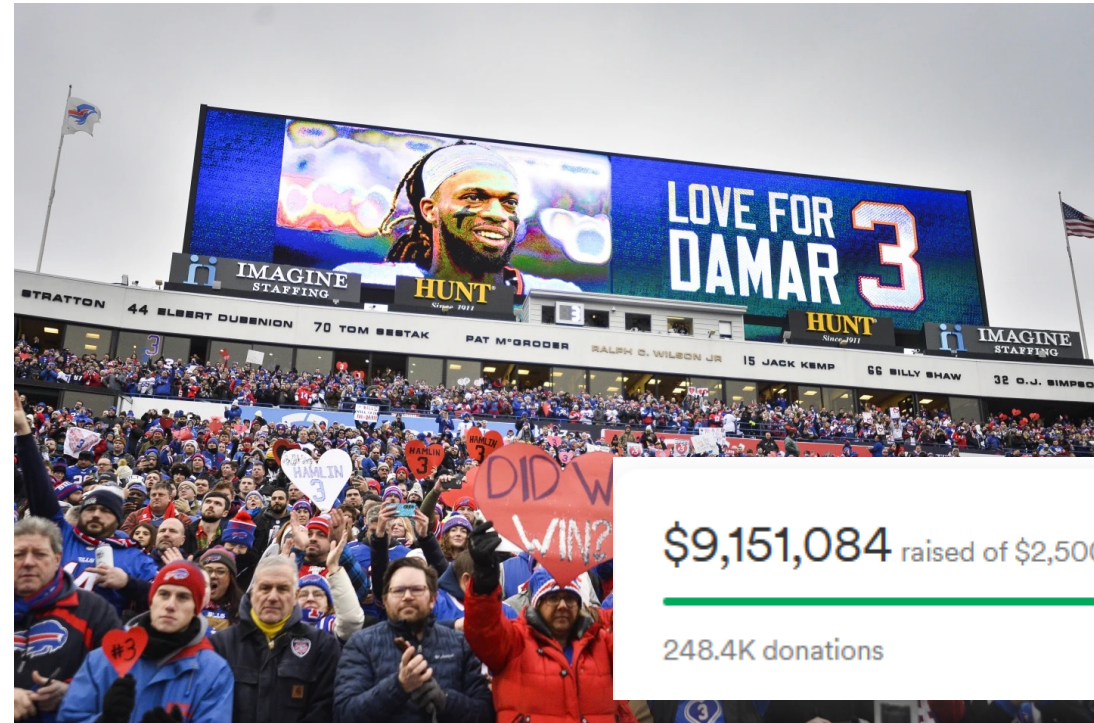
*"The most generous day ever on GoFundMe."*

- January 2, 2023

- Gen Z and millennial donors
- Those who are not married
- Those who are less religious

*....are more likely to give through crowdfunding than to traditional nonprofits.*

- IU Lily School of Philanthropy, 2021



\$9,151,084 raised of \$2,500 goal

248.4K donations

*\$30B in GoFundMe giving since 2010*



A Once-In-Generation  
**Shift in Strategy Is Upon Us**

# The Great Wealth Transfer

**\$84 Trillion**

From Boomers to Gen X, Millennials and Z

**\$12 Trillion**

Anticipated to go to charity



# THE NEW MULTI-CHANNEL WORLD OF ALUMNI RELATIONS & FUNDRAISING?



THE CHALLENGE OF THE SCROLL



Alumni and fundraising staff are  
drowning in data and starving for:

**Actionable Data**

# Trivia

How predictive are the following factors in decision-making?

% predictive

How predictive is Gender in decision-making?

# Gender



How predictive is Gender in decision-making?

Gender

8%

How predictive is Race in decision-making?

# Race

How predictive is Race in decision-making?

Race

4%

How predictive is Income in decision-making?

**Income**

How predictive is Income in decision-making?

**Income**

6%

How predictive is Personality in decision-making?

**Personality**

How predictive is Personality in decision-making?

**Personality**

**15%**

Social Science Trivia

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18%

Gender  
Race  
Geography  
Income

15%

Personality



## Social Science Trivia

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The Combination Effect

**38%**

**Personality**  
**Gender**  
**Race**  
**Income**  
**Religion**  
**Geography**



# PRESSURE FORCES CHANGE

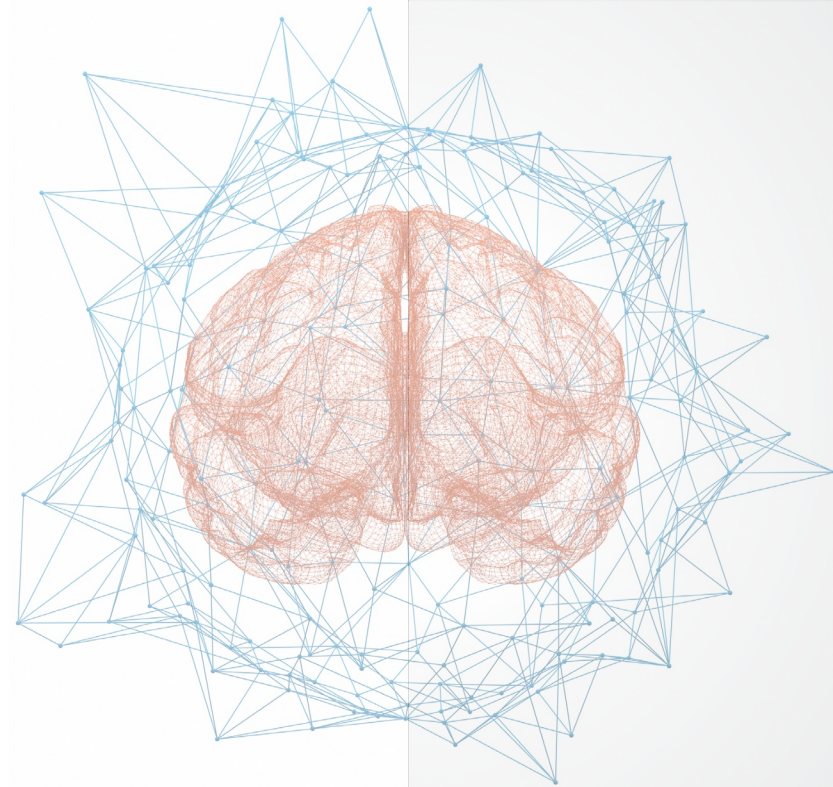
THE KEY STRATEGIES TO APPROACH  
THE NEXT GENERATION OF ALUMNI  
AND DONOR PROSPECTS

# Fundamentals

1. **Clarify** the brand and campaign story
2. **Locate** the most engaged prospects
3. **Deliver** the right messages

# *who to engage*

ACUITY IDENTIFIES CAPACITY TO GIVE  
AS WELL AS WHICH DONORS  
OR ENGAGERS ARE MOST PROMISING FOR  
DIRECT DEVELOPMENT EFFORTS



# *how to engage*

DARTS USE PSYCHOLOGICAL FACTORS LIKE  
PERSONALITY, MOTIVATION,  
AND DESIRES TO ALLOW FOR DYNAMIC  
COMMUNICATION SEGMENTATION

# 750+ Variables

Household Information	
Home Ownership	76.8%
Median Home Value	\$300K
Veteran Status	1.2%
Social Media Use	Highly Active
Political Affiliations	
Democrat	30.7%
Republican	41.8%
Third Party	0.2%
Independent	9.2%
Nonvoter	18.2%
Car Type Preference	
SUV	13.6%
Sedan	10.6%
Mini-van	6.0%
Truck	3.6%



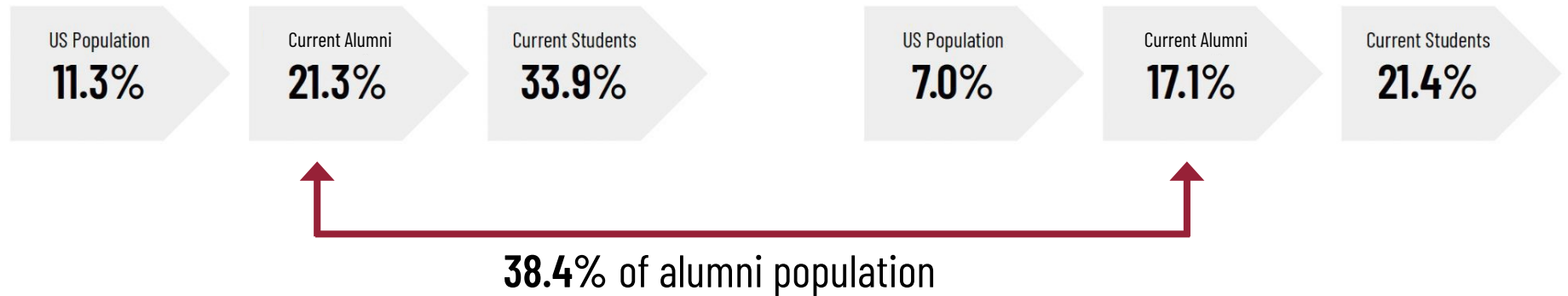
## Demographic Profile

Head of Household Age	56.7
First-generation College Percentage	31.1%
Home Ownership Percentage	91.3%
Median Household Income	\$133K
Social Media Use	Addicted



## Demographic Profile

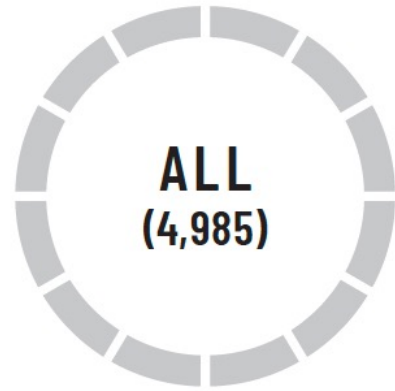
Head of Household Age	47.8
First-generation College Percentage	31.9%
Home Ownership Percentage	88.6%
Median Household Income	\$132K
Social Media Use	Addicted



OK, we know where they  
are but do we know if  
they are engaged?

# ACUITY

## ENGAGEMENT ANALYSIS



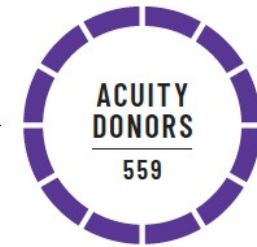
**TOTAL  
CAPACITY**  
\$146 MILLION+



**INDIVIDUAL  
CAPACITY**  
\$97 MILLION+



**TOTAL CAPACITY**  
\$9,100,565



**TOTAL CAPACITY**  
\$84,918,700



**TOTAL CAPACITY**  
\$3,233,594

*All capacities noted are over five years and to all charitable organizations.*

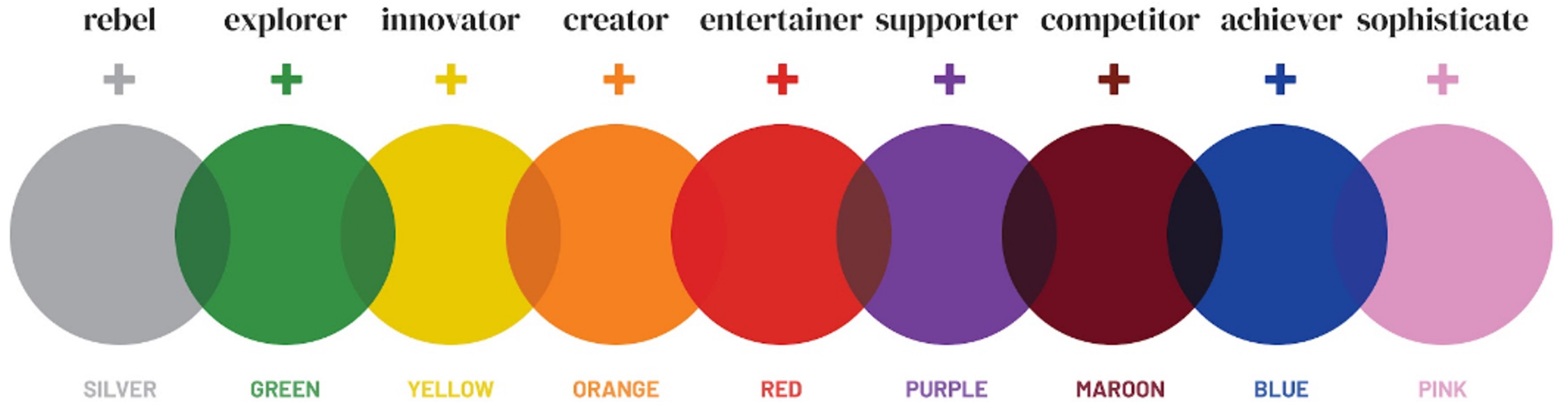
But, do we know  
who they really are?



# psycho graphics

# archetypes

THE PERSONALITY SPECTRUM



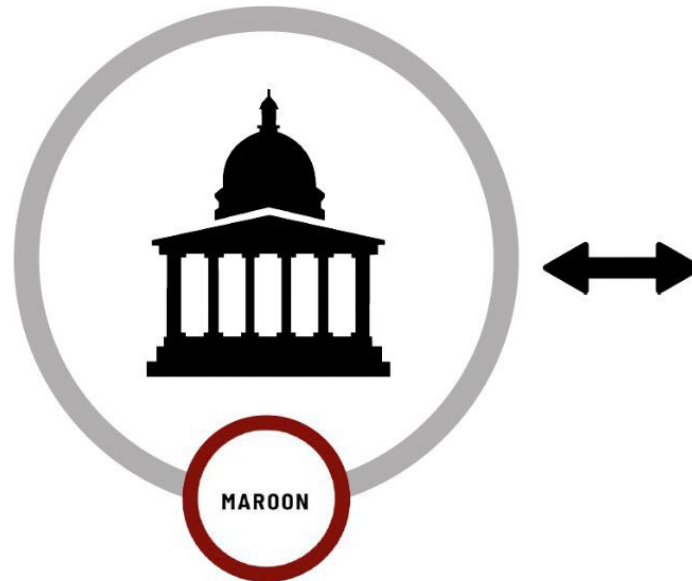
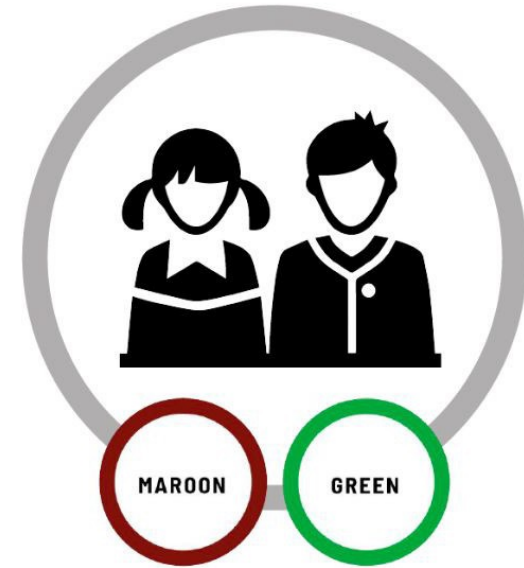
**Connect  
the dots.**

**Know what  
to say to  
your alumni.**

UNIVERSITY PERSONALITY



ALUM PERSONALITY

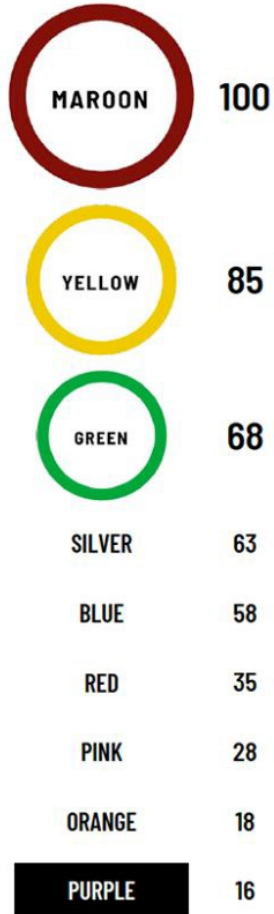


# DART 3

## competitive challengers

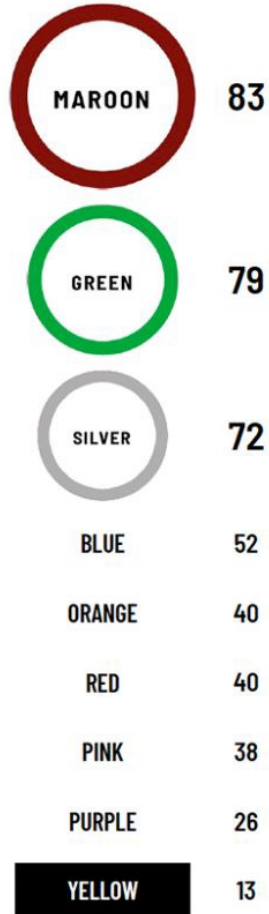
### Personality Identification

Psychographic personality expression and qualities with which **this Dart** personally identifies and defines itself.



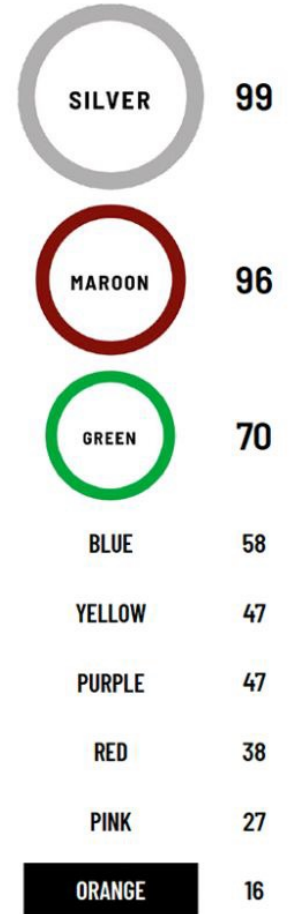
### Copy Preference

Psychographic personality expression and qualities that **this Dart** is most motivated by in the written word.



### Image Preference

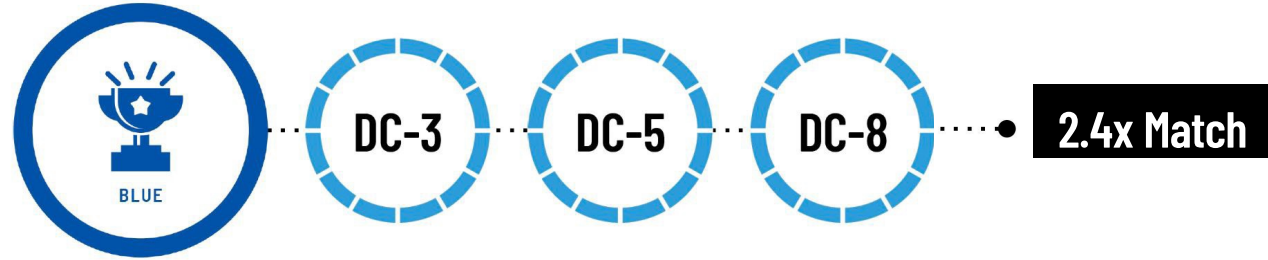
Psychographic personality expression and qualities that **this Dart** is most motivated by in images and design.



## Demo + Psycho

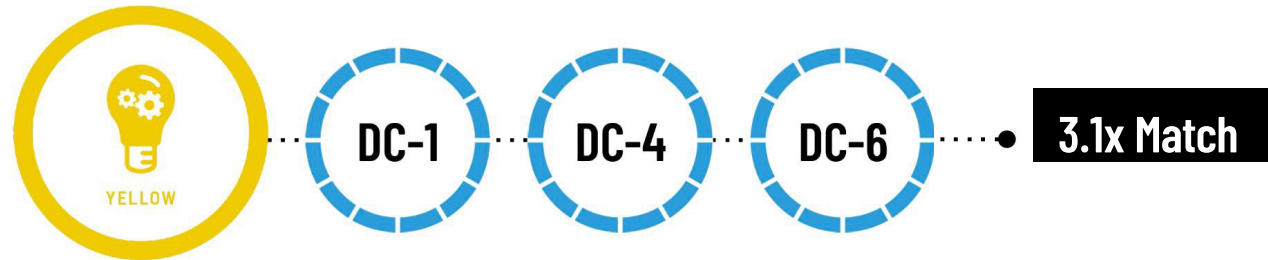
### Dart 1 Intentional Pathfinders

Accomplished & Influential



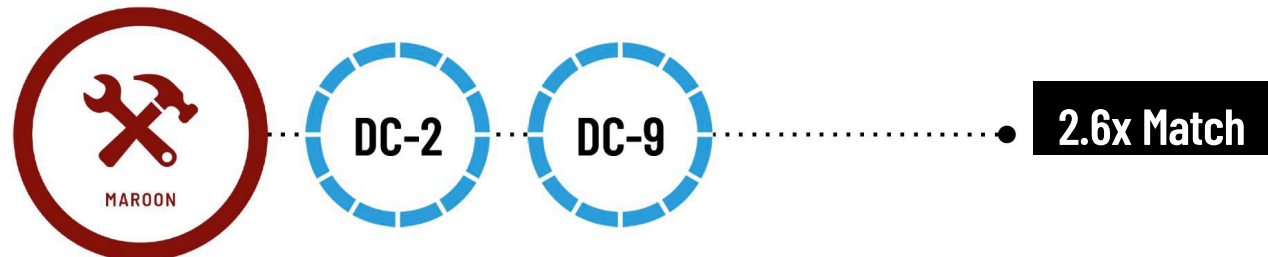
### Dart 2 The Quietly Curious

Analytical & Experiential



### Dart 3 Competitive Challengers

Industrious & Competitive



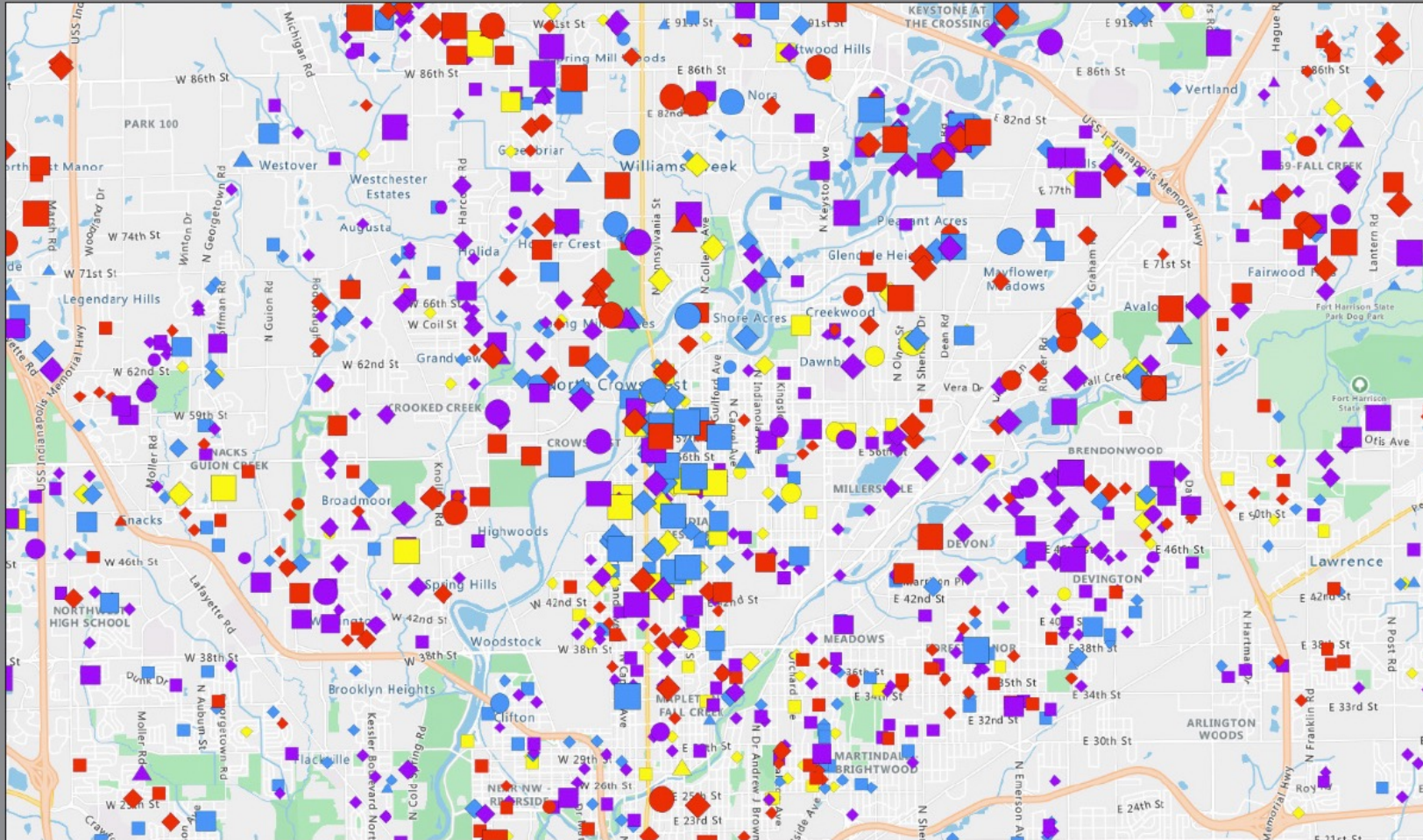
## ACUITY & DARTS NORTHERN INDIANAPOLIS

  
**DART 1**  
MISSION MAVENS


  
**DART 2**  
GRATEFUL GIVERS

  
**DART 3**  
CONNECTED COLLABORATORS

  
**DART 4**  
INSPIRED INNOVATORS



  
**ACUITY 1**  
DONORS & ENGAGED

  
**ACUITY 2**  
DONORS ONLY

  
**ACUITY 3**  
ENGAGED ONLY

  
**ACUITY 4**  
OUTSIDE ACUITY

**LARGE ICONS**  
Capacity Above \$25,000

**MEDIUM ICONS**  
Capacity Between  
\$10,000 and \$25,000

**SMALL ICONS**  
Capacity Below \$10,000

So, how do you  
know what is right?



**Thank you !**

Reach out to us with questions or to request a free lunch and learn session for your team!

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Scott Ochander: [sochander@Carnegiehighered.com](mailto:sochander@Carnegiehighered.com)