



# Generational Differences: Millennial & Baby Boomer's Philanthropic Engagement

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# Abstract

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Generational differences have been researched and examined from numerous angles.

What one generation believes, thinks, or feels can be different than that of their parents or grandparents, thus creating a generational divide. Understanding these differences is crucial to all types of businesses in order to enhance collaborations and form relationships. Learning about these generational differences can provide a roadmap to success. The university setting is no different than a business that has consumers (students) and producers (staff) that are part of a business plan. Radford University's two largest constituency groups are "baby boomers" and "millennials." These two generations experience different circumstances within their lives that shape the way they communicate, learn, work, and develop relationships. This study examined and formulated a plan for how to philanthropically engage these two constituency groups. This study was executed using mixed-method research to gather data, both qualitative and quantitative, via survey methodology and design-thinking strategies. Interviews with eight advancement employees at Radford University generated characteristics of baby boomer and millennial donors that supported the literature, while the questionnaire responses from 60 alumni suggested that generational divide may not be as prevalent. Over 65% of respondents favored giving through email or other forms of technology regardless of whether they were baby boomers or millennials. The workshop results involving the entire advancement team resulted in concept posters proposing solutions to donor engagement that are student focused.

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## Introduction

In this paper, we examine the literature pertaining to the generational difference of alumni donors and their observable characteristics impacting philanthropic engagement. The literature is used to further evaluate the two largest constituency groups at Radford University and how their observable characteristics can enlighten us on the appropriate ways in which the groups currently are engaged philanthropically and how to best cultivate relationships. Radford University is a comprehensive public university in Southwest Virginia consisting of approximately 11,000 undergraduate and graduate students (Radford University, n.d.). When evaluating the data at Radford, the two largest constituency groups are baby boomers, or those born between 1946 and

1964, and millennials, otherwise known as Gen Y, individuals born between 1981 and 2000. Finding best practices for cultivating strong relationships with donors is crucial to the stability of many institutions and organizations, and Radford University is no different. The better we understand our alumni, donors, and supporters, the more we can sustain progress and build upon the fundamentals of the institution (Rovner et al., 2018).

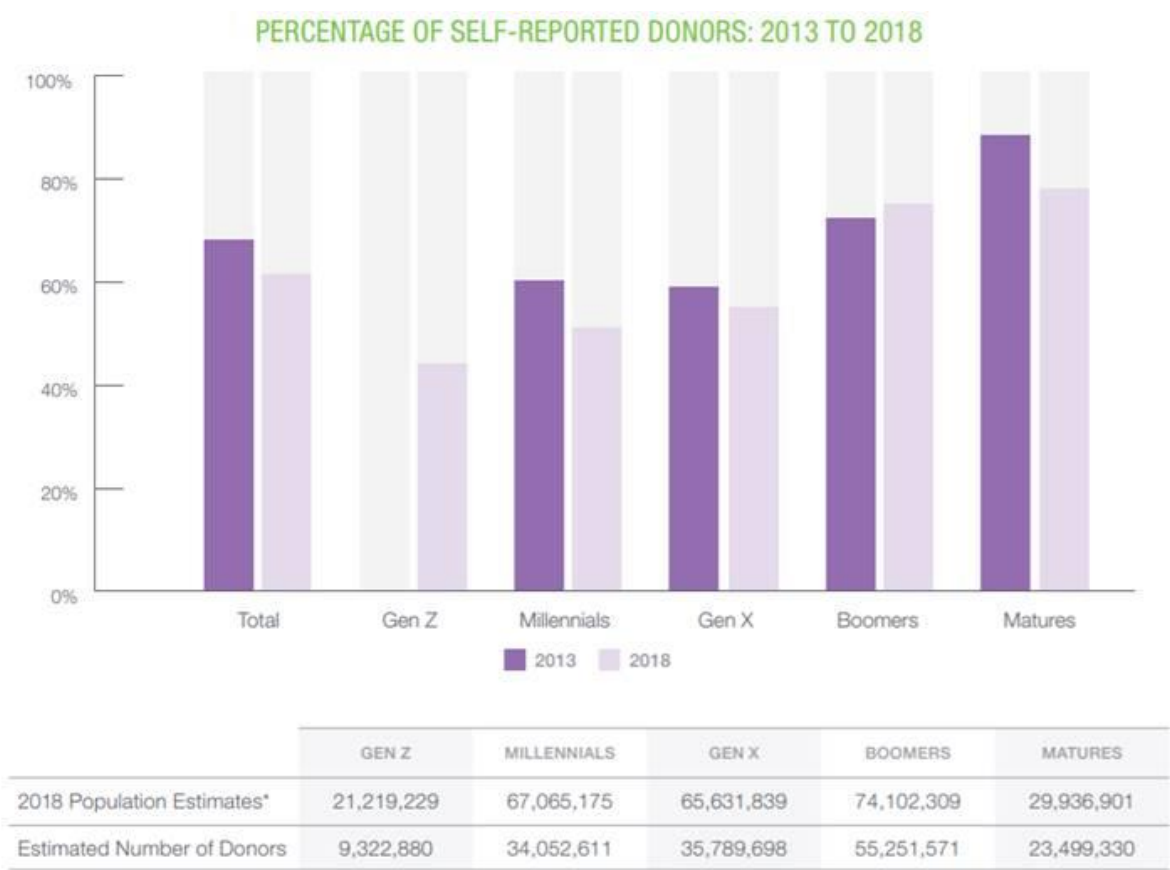
Much research has been done to evaluate generations and how they each operate, but little research has compared and acknowledged the two groups that are most prevalent at Radford. Investigating the patterns of donors' behaviors will offer suggestions on how to create an effective format for fundraising, specifically within the two groups. Any meaningful discussion focusing on donor activity across generations must first identify common generational differences. Because generations vary in attitudes, experiences, behaviors, habits, and expectations (Hartnett & Matan, 2014), having a deep understanding of baby boomer and millennial supporters and how they engage with the university will be the focus of this study. Comprehending the differences between the generations and how they make decisions can help determine the best cultivation methods to use for certain donor pools in a way to target that audience and provide positive results (Hartnett & Matan, 2014).

Even though the "Greatest Generation" or the matures, born before 1946, remain a significant giving force, institutions need to find ways to educate younger generations on how and why to give (Rovner et al., 2018). As younger generations emerge and become dominant, it is important to evaluate whether the original



assumptions about philanthropy still ring true, or if there are more beneficial ways to increase philanthropic engagement and donor giving. The purpose of this investigation is to gain an understanding of the differences in philanthropic engagement trends of the two largest constituency groups, baby boomers and millennials, at Radford University as well as to expand ways to cultivate relationships. This research will be used to recommend strategies that higher education institutions can and should adopt in order to retain donors as they age. This investigation is important because as time and technology change operations, it is increasingly difficult to calculate return on investment (ROI) in a fundraising channel, meaning looking at direct mail or phone calls. Fundraisers everywhere should calculate their ROI by audience as opposed to channels because of the spillover that occurs among channels. Overtime, less Americans are giving, so learning about and retaining the pre-existing donors is crucial. With the exception of baby boomers, other generations have seen a decline in the cohort percentage who say they give to charity (Non Profit Times, 2018) (see Figure 1) since 2013. These statistics illustrate the importance of examining the two largest groups who currently give to Radford University (RU) in order to expand further and retain this donor pool. Currently, RU tends to market to these two groups using similar strategies not necessarily defined by their generation. This research will determine if this tactic is successful.

Figure 1.



\*Source: American Community Survey 2016, US Census Bureau

# Definition of Terms

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*affinity clustering*: a graphic technique for sorting items according to similarity (Luma Institute, 2012)

*baby boomer*: someone born between 1946 and 1964

*channel*: method of communication (i.e., phone, email, social media, direct mail, personal contact)

*constituent*: anyone with a relationship to the institution

*cultivation*: relationship building

*design thinking*: a process for creative problem solving

*donation*: monetary gift to the institution

*engagement*: participating in or communicating with the institution

*event registration*: paid or unpaid entrance fee to an event held by the institution

*experience diagramming*: a way of mapping a person's journey through a set of circumstances or tasks (Luma Institute, 2012)

*institution*: Radford University

*interviewing*: a technique for gathering information through direct dialogue

*millennial*: someone born between 1981 and 2000

*persona profile*: an informed summary of the mindset, needs, and goals typically held by stakeholders (Luma Institute, 2012)

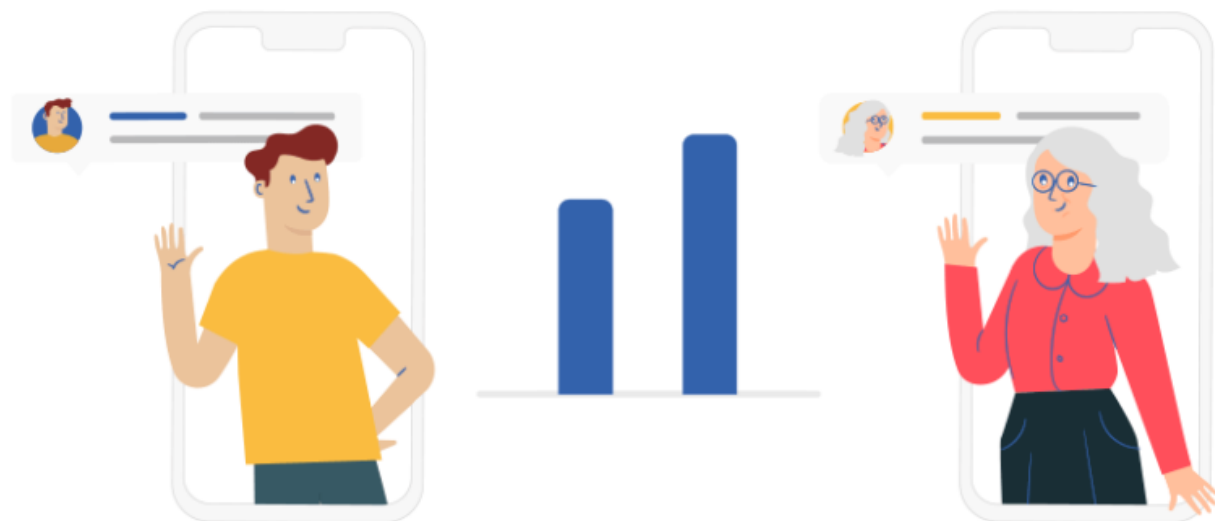
*Raiser's Edge*: fundraising and relationship management software

*Society of 1910*: recognizes alumni and friends who have generously included Radford University in their estate plans

*statement starters*: an approach to phrasing problem statements that invites broad exploration (Luma Institute, 2012)

*visualize the vote*: a quick poll of collaborators to reveal preferences and opinions (Luma Institute)

# Millennials VS Baby Boomers



## Literature Review

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When examining past research pertaining to giving amongst the generations, growing up during different times of communication and technology advancements has a strong impact on the giving patterns of individuals. Each generation of donors has cultivated distinct ways to connect and relay messages about things they feel passionate about. While the younger, tech savvy generations embrace mobile and social giving, many seniors still rely heavily on direct mail. The rapid speeds at which people adopt new technologies is driving universities everywhere to build multichannel strategies for engaging their donors (Chung, 2018). In order to maintain these cultivated relationships, it becomes pertinent to continue to evolve and find ways to

engage most effectively in order to have the largest impact. Today's younger generations have the potential to be significant philanthropists, the most significant in history, but in order to make that happen, we must learn more about them, their core values and desires, as well as their preference for communication (Next Gen Donors, 2013). Providing the appropriate context, content, and opportunities to a prospect becomes much easier when you consider the world they grew up in and how they are likely to be motivated today. As each new generation is born and experiences the education system, new technology emerges and changes these driving factors. It becomes more important to keep up with the changes if we want to understand the people we are engaging with (Advancement Form, n.d). In addition, each generation is shaped by events experienced during their lifetime and these events can impact values and motivations, understanding and use of technology, communication preferences, and engagement efforts (Schwab, 2016). Utilizing the generational differences and segmenting constituents by age is not a foolproof approach, but it can lay the groundwork and provide a roadmap for the fundraisers who are securing these philanthropic gifts. Securing these gifts and increasing donor engagement at universities becomes more important every year as we see federal funding in higher education decline steadily. Institutions must rely on their generous donors' support (Lara, 2014).

## Millennial Philanthropic Giving

Organizations all over are facing the same crisis: an aging donor base. This rapidly evolving economic issue is leading fundraisers in all facets to cultivate new

support and increased attention is now turning to new leaders in the fundraising world: millennials (Bank of America, n.d.). Millennials, sometimes referred to as “Gen Y,” are those born between 1981 and 2000 and are thought to be optimistic, work well in teams, and are incredibly tech savvy or digitally literate (Sarrantonio, 2018). See Figure 2 for a list of preferred methods of giving according to millennials. Elders have preconceived notions about millennials, specifically about their desire for instant gratification and the self-expression and entitlement they can sometimes portray. They are confusing to other generations, and oftentimes can be misunderstood. Overall, millennials think fast, process thoughts immediately, and have the need to give feedback on topics regardless of their authority on the matters at hand. Though sometimes pestilent, their desire to receive things instantaneously makes them suitable candidates for serving in capacities where they feel valued and important.

#### HOW MILLENNIALS PREFER TO GIVE

1. ONLINE WEBSITE
2. IN-PERSON (DIRECTLY TO A PERSON OR AT AN EVENT)
3. SMARTPHONE (MOBILE WEBSITE)
4. MAIL
5. PAYROLL DEDUCTION
6. Groupon, LIVING SOCIAL, OR OTHER OFFER
7. TEXT
8. OVER THE PHONE

**Figure 2.**

Millennials, though oftentimes misunderstood, will be the largest demographic in the American workforce by 2020 (Young Entrepreneurial Council, 2018). With that kind of presence, finding ways to

cultivate relationships with them becomes increasingly important. There has been much written about the entitlement millennials seem to have, but they are the farthest thing from passive; in fact, their obsession over progress is what fundraisers everywhere should use to the advantage of the institution. This generation is also known as “the

impact generation” due to their overwhelming focus on the idea that life can and should be better (Young Entrepreneurial Council, 2018). The figure below from the Bank of America Private Bank Solutions study shows the drive, desire, and opportunity that lies in the hands of millennials (see Figure 3).

**Figure 3.**

**What inspires millennials to get involved?**

<b>Drive</b>	<b>Desire</b>	<b>Opportunity</b>
To have a positive impact	To forge relationships	To enhance and leverage their expertise

Source: Bank of America Private Bank Philanthropic Solutions

In addition to finding their drive and desire, creating and perfecting simplified methods for giving becomes significantly more important with millennials. Giving them targeted options for their giving allows them to see and understand the impact that will be made with their donation. Doing preliminary research to discover what each individual cares deeply about can provide a starting point for discussion. Appealing to emotions by showing them what it is they are doing with their money is one of the most effective ways to secure a gift. When utilizing social media, for example, incorporating student videos, quotes, and photos allows millennials the visual opportunity to see their hard-earned dollars at work and creates a feeling of connection to that student. Transparency is important to millennials, and this method does exactly that (Advancement Form, n.d).



## How to Engage Millennials

According to Bank of America's article on millennial motivation, there are some key ways to engage this young, up-and-coming group of individuals:

*Think Small:* Millennials often need to be handled with kid gloves, so to speak, meaning that they need to be eased into a relationship or networking situation as opposed to jumping the gun. They like to participate when they feel they are making a difference, such as volunteer opportunities, fundraising events, or arenas where they are directly impacting.

*Make Space:* Including millennials in programming and behind-the-scenes work where they are actively participating feels meaningful to them. Largely, this generation feels a personal sense of social responsibility, so adding them to boards and committees where their opinions are heard is often what they desire.

*Give Results:* This young generation is focused on instant gratification, and they want to see a measurable impact and experience full transparency on items they put their time and money into. If they are engaging philanthropically, they want to see that the organization they are working with is moving in a positive direction.

*Get Social:* Millennials nationwide are connected through their social media vehicles: Instagram, Twitter, Facebook, etc. Their presence in these capacities allows them the opportunity to reach and influence others easily and rapidly. Organizations should use social media to their advantage giving millennials the power and instant gratification they often seek.

Although online giving has not been the primary method of receiving donations, it is quickly gaining power in numbers by becoming the number one strategy for reaching younger generations (Sarrantonio, 2018). Every year, the online giving numbers rise, driven by preferences of millennials. Online donations are desirable for a range of age groups and generations, but creating ways for millennials and younger generations to give and experience instant gratification is a must if institutions and organizations want to remain relevant. This generation of individuals is receiving thousands of messages daily through the multitude of social media channels and technology methods they utilize. Reaching them where they are, or how they like to be reached, can be beneficial, but can also be unsuccessful due to possible difficulty with multitasking skills (Young Entrepreneurial Council, 2018). Institutions and organizations have to focus on grabbing attention in a meaningful manner while avoiding getting lost in the shuffle of the young millennial's mind. Of the different methods of fundraising, millennials prefer mobile giving, such as Venmo, networking through social media links, crowdfunding, and in-person events with others of their age range (Rovner et al., 2018).

## **Baby Boomer Philanthropic Engagement**

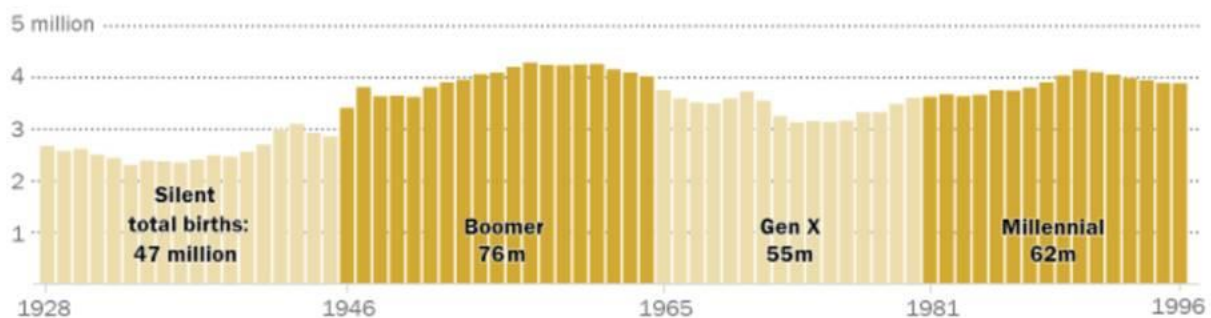
Baby boomers, or those born between 1946 and 1964, are oftentimes called the “me” generation, meaning they are optimistic, team-oriented, and driven (Sarrantonio, 2018). The average donor in the United States is 64 years old, placing them directly at the center of the baby boomer cohort. It is predicted their dominance as a generation will continue for at least another five years (Rovner et al., 2018). Baby boomers got

their generation's name from the boom in U.S. births following World War II (Fry, 2018). This generation values financial stability, a good work ethic, and to observe growth and success in all aspects. As a general rule of thumb, they enjoy interactions and in-person meetings. Fundraisers understand that to cultivate relationships with "Boomers," they need to court them and make them feel special yet comfortable (Bhagat et al., 2010). Baby boomers differ from millennials in that they believe they are more impactful with their monetary contributions as opposed to millennials and their desire to "spread the word" (Hartnett & Matan, 2014). The baby boomers' presence peaked at 78.8 million in 1999 and have remained the largest living adult generation for many years. This information can be seen in the image below from the U.S. Department of Health and Human Services National Center for Health Statistics (Fry, 2018) (see Figure 4).

**Figure 4.**

### **Births underlying each generation**

*Number of U.S. births by year and generation*



Source: U.S. Department of Health and Human Services National Center for Health Statistics.

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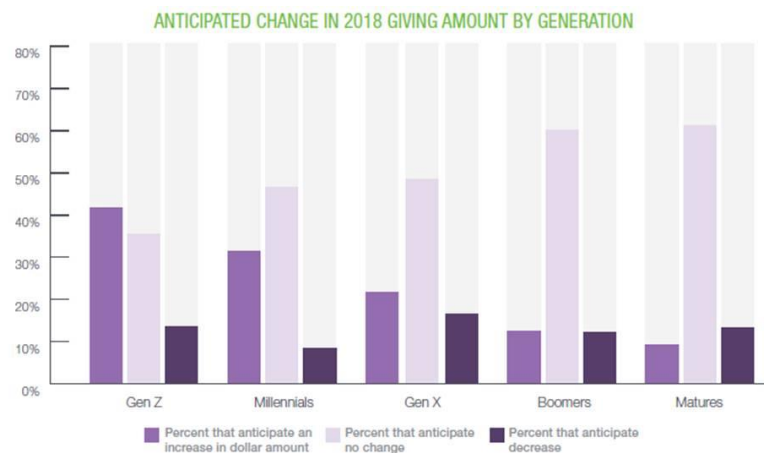
When investigating how baby boomers prefer, or wish, to be engaged, they are shown to respond to paper mail, yet are increasingly giving through an organization's website. While baby boomers engage heavily through the vehicle of direct mail, their online giving and social media usage continues to spike every year (Chung, 2018). Giving online is the donation preference for all four other generation groups, though social media giving is close behind with millennials and Gen Z respectively. While it remains a powerful tool with baby boomers, direct mailing preferences have declined by more than 25% in the last 8 years (Otten, 2018). Aside from direct mail, this generation responds best to in-person "asks" and personal visits at the home, a restaurant, or workplace (Rovner et al., 2018). When researching how baby boomers are making donations, results indicate they are actively engaging in consistent, reoccurring monthly giving options without the need for a repetitive action: the money (of their choosing) is automatically drafted from an account on a specified date each month (Chung, 2018) (see Figure 5). This method of a reoccurring gift is also becoming popular with millennials, as they are used to the ease and efficiency of auto-pay across many facets of their personal life.

**Figure 5.**



This generation gives the most, approximately 41% of all money donated. In a report by Blackbaud presented from interviews done by Edge Research, baby boomers state their giving will either stay the same (60%) or increase (12%) in the upcoming year (Non Profit Times, 2018).

Figure 6 shows the anticipated change in 2018 giving amounts by generation. This figure is part of the Next Generation Giving report done by Blackbaud.



**Figure 6.**

## Questions to Review Further

With the prevalence of technology, the evolution of building connections and channels have been recreated to increase donor engagement. As the “giving baton” passes from generation to generation, will giving habits and attitudes remain a product of generation differences? Or, will millennials’ mindset remain the same in response to philanthropic engagement once they reach the age of baby boomers?

*Will they outgrow their need for instant gratification?*

*Will they think and behave more like their parents and grandparents?*

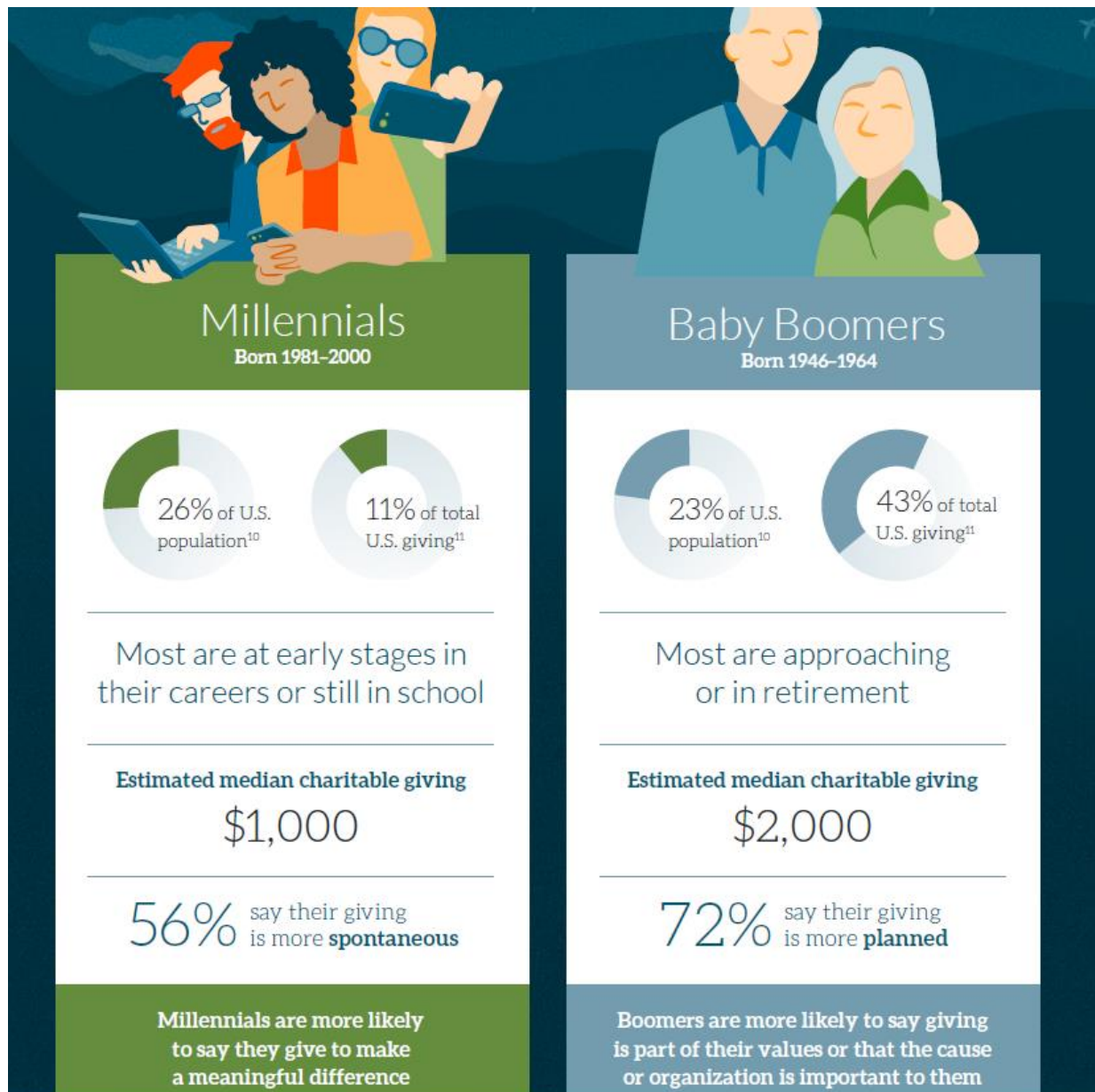
*Will the values they express now carry forward into their older adult lives?*

*Will this impact their giving behavior?*

Research done by Blackbaud Institute suggests there is evidence for both perspectives. It is quite possible that the beliefs millennials hold now will remain, but it

is also quite possible that they assume the roles their parents once had and take over this giving baton (Rovner et al., 2018). With the number of baby boomers shrinking in size over the years, millennials will be sure to surpass their count and become the nation's largest living generation, this is according to the population projections seen from the U.S. Census Bureau. In addition, the millennial generation continues to grow as young immigrants add to their count (Fry, 2018). While total alumni giving has been on the rise, alumni participation has been at a slow but steady decline (Lara, 2014). The hope with this research is that it will provide some conclusions and insight pertaining to Radford University's alumni engagement trends based on generation as well as begin setting the groundwork for implementation of innovative methods for philanthropic engagement. Figure 7 shows a comparison chart of key information pertaining to millennials and baby boomers.

**Figure 7.**



## Previous Research on Philanthropic Giving among Baby Boomers and Millennials

There has been research done previously on the philanthropic giving to universities and institutions based on a variety of variables. Many researchers have

focused their studies on the philanthropic giving based on age, and some have investigated generations; however, little comparison has investigated the two groups examined in this study (Baranyi, 2011). Prior research, by Eniko Eva Baranyi (2011) at Kennesaw State University, focused on the millennial donor and their current engagement but does not acknowledge other generations, specifically the baby boomers. The results indicate that millennials prefer a multilevel approach to communication utilizing email, social media, and other technology outlets, though not much is discussed pertaining to in-person events and giving initiatives. The need for millennial donors is evident. Baby boomers are aging, and millennials will be the largest and most prominent group. Thus, determining millennial giving and donation preferences is crucial. The research conducted by Baranyi focused their efforts on answering five important questions:

- 1. How important is volunteering/donating for millennials?*
- 2. Why do they volunteer/donate?*
- 3. How do millennials connect with organizations?*
- 4. What percentage volunteers in their community and how often?*
- 5. What percentage donate and how often?*

Findings show that millennials are three times as likely to give online versus sending a check in the mail. Those kinds of numbers provide a clear message about evolving times and the need for a strong focus on the online donation platform as opposed to a mailed communication piece with this generation. Additionally, millennials seem to be more likely to spend their time volunteering as opposed to making



donations, but by using a variety of communication channels, they are being primed to be good candidates for financial contributions in the long run. Research illustrates that financial contributions are less frequently received by millennials, but much of this can be attributed to the lesser income they bring in, as opposed to baby boomers who are long into their careers and have worked up the ladder (Baranyi, 2011).

In another research study conducted in 2016 at The University of Charleston, the researcher examined four generations, matures, baby boomers, generation X, and millennials and the giving trends amongst them. One point that the researcher made was that environmental factors play a role in the decision-making of each generation as well as their values and motivations, so keeping those in mind is necessary for understanding the giving habits. The researcher discussed how higher education institutions need to recognize that the contributions may be small initially in the years after graduation, but cultivating relationships allows them to capitalize on the altruistic methods of giving and the ability to increase gifts over time. Highlighting a campaign on social media and asking for \$5 and \$10 gifts with quick access to an online donation platform is seen to be a highly successful and effective strategy with millennials (Schwab, 2016).

Albritton (2020) focused on the motivations for donating to an individual's alma mater. This research found that experiences (communication and contact) that occurred after an individual graduates affects a millennial's intent to give more than his or her experience prior to graduation. The survey conducted indicates that communication with a millennial alum following graduation will ensure his or her engagement with the

institution. The study sought to answer the question “What are the variations between the four giving generations regarding philanthropy?” and their results show that there are no variations between the generations as it relates to how they decide to give, why they decide to give, and to which charities they decide to give. These results contradict the purpose and focus of this proposed study and clearly is a gap in the research that deserves further investigation. For this study’s purpose, however, not all generations will be investigated; rather baby boomers and millennials will be the focus. While there is much research on donors and their philanthropic engagement, not much literature compares the two large constituency groups that this study will focus on and thus the need for investigation. If baby boomers are currently providing the most monetarily at the present moment, their relationships with the university remain prominent and important. With the millennials being the other largest constituency group, though their contributions may be small now, they one day will take the place of baby boomers in becoming top contributors, so educating them, understanding them, and cultivating relationships with them should remain at the forefront of advancement professionals’ minds. Creating a guideline or map for how to retain and maintain open communication with both groups continues to be the focus. Albritton gives the following recommendations for advancement professionals:

1. Institutional leaders should not dismiss the giving generations ahead of millennials. There is a clear pattern among the generations related to giving by age and giving capacity. Based on the ages of the current four giving generations, there are many years between the present and millennials and

their maximum giving capacity. It is important to recognize that while millennials are the future, they are not the present nor the immediate future of institutional giving.

2. Continue to embrace traditional forms of giving, while adapting and including technological forms of giving. The research has shown that tradition and technology appeal to all four giving generations.
3. Align messaging to target audiences as related to generational giving lifecycles. If institutions invest in targeted messaging, the potential is maximum giving among generations throughout their giving lifecycles.

## Methods

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Based on the literature discussed, gaps do exist. Comparison between baby boomers and millennials is sparse. Thus, the purpose of this study was to gain an understanding of the differences in philanthropic engagement trends of the two largest constituency groups, baby boomers and millennials, at Radford University as well as to expand ways to cultivate relationships. The research was conducted in several stages.

### STAGE ONE

The first stage consisted of data collection, analytics, and clean-up by the researcher of the Radford University (RU) alumni categorized as baby boomers or millennials. Utilizing the Raiser's Edge system with Radford University constituent information, the data collection was a quick process providing necessary numbers and information. This stage allowed for the hard numbers, or the true and accurate information pertaining to alumni existing currently in the Raiser's Edge system to be pulled, observed, and used to inform the second stage.

The system (Raiser's Edge) is utilized by the University Advancement Department to maintain, track, and reference all constituents of the Radford University community. Any information about an individual (referred to as a constituent) is kept within their own personal record. Information such as name, address and contact methods, college, major/minor, clubs and organizations, relationships (parents, spouse, siblings, company, groups), as well as any and all record of donations, phone calls from the Advancement Department, events attended, mailings received, and comments

pertaining to all personal contact are on the constituent record. This keeps track of how the university is communicating with the individual and his or her up-to-date personal information and demographics.

## **STAGE TWO**

The data collected from Raiser's Edge was used to create a sample (approximately 100 within each generation) of alumni to email a questionnaire. The questionnaire questions can be found in the appendix (see Appendix H; note that consent is included in the questionnaire) and were adapted from a survey conducted by San Diego State University, which were altered to reference Radford University. Additionally, many of the questions were removed from the original in order to better focus on the goal of the survey.

## **STAGE THREE**

Following the obtaining of Radford University data from the Raiser's Edge system and distributing the questionnaire, individual interviews with current Radford University professionals were conducted via zoom. Using a convenience sampling technique, eight ( $n = 8$ ) individuals who currently work in university advancement participated. These individuals have background information on the current donation system. Furthermore, many come from different universities and shared those previous experiences. Because the principal researcher works in university advancement, she recruited individuals via face-to-face and email. Prior to conducting interviews, consent was obtained (see Appendix D for consent form). Inquiring with the current fundraisers and staff to determine their thoughts on the generational differences they are currently

experiencing laid the groundwork for further research. Questions the university advancement staff were asked included:

1. In your opinion, what are some characteristics to describe baby boomers?
2. In your opinion, what are some characteristics to describe millennials?
3. What is being done to appeal to baby boomers?
4. What is being done to appeal to millennials?
5. What are current problems you notice with donations or engagement?
6. What does a donor experience look like currently?
7. Are there ways it could improve?
8. What marketing techniques do you find most useful with baby boomers?
9. What marketing techniques do you find most useful with millennials?
10. Do you notice different trends in communication preferences with millennials versus baby boomers?
11. Based on your experience, what is the ideal way to appeal to baby boomers to increase donations?
12. Based on your experience, what is the ideal way to appeal to millennials to increase donations?

## STAGE FOUR

After completion of the questionnaire from alumni and the interview with advancement team members, the researcher created three persona profiles per generation. These persona profiles were used to explain the key differences and/or similarities between baby boomers and millennials and were based on data analyzed

from the questionnaires and interviews. Once the personas were developed, they were critiqued by the researcher's colleagues in the Advancement Department. The personas were to be revised based on the feedback from the advancement individuals' critique sheets; however, the feedback did not indicate changes to be made, as participants stated that these personas "personified" the types of donors within the two generations.

## STAGE FIVE

Once the interviews, questionnaire, and persona profile critiques were complete, a virtual workshop was conducted via Mural with Radford University Advancement colleagues. Using a convenience sample, the workshop was comprised of Radford University Advancement staff. The student researcher is a RU employee and recruited individuals in an email manner. The goal was to have 6 to 10 individuals attend the virtual workshop; however, the entire advancement team was included in order to gain as much information as possible and to allow all areas of the department to be represented. Participants were provided with consent forms via email (see Appendix K). The virtual workshop in Mural stayed open for one week so that team members could continue brainstorming.

The workshop was utilized to brainstorm on solutions based on the personas. Generating ideas for communicating and engaging both individuals in the millennial and the baby boomer category got the creative thoughts flowing in the group. The researcher then provided a template for team members to write their thoughts for four

different categories for both baby boomers and millennials as a way to collaborate in regards to the giving process at Radford.

1. Worked well
2. Needs to change
3. Unanswered questions
4. New ideas to try

In addition to the advancement team members posting their thoughts within the four squares, the researcher compiled the feedback from the interview responses and did affinity clustering to determine common themes. The researcher then used these statement starters as a Mural template for further brainstorming with the advancement team. The participants went back into Mural to respond to the statement starters and generate ideas. Following the completion of these Mural boards for brainstorming, the researcher created two concept posters based on responses from the interviews, questionnaires, and virtual workshop in order to provide a “guide” addressing communication, cultivation, and engagement with millennials and baby boomers.

This research can be used within the University Advancement Department to make strategic moves targeting constituents in the most impactful and effective way. The university cannot function without the support of the community and donors, so their philanthropic engagement is crucial to the success and future of RU and the Highlander family. Currently, Radford University uses a variety of vehicles, or methods, of communication in order to engage constituents. There are different emails that are sent to donors based on prior giving, college or major, upcoming relevant information,



constituency type (such as parents or alumni), or campaign that may be happening. There are also direct mailings based on the same categories. For example, there may be a direct mailing for “lapsed donors” (i.e., individuals who have given, but lapsed in the time in which their gift arrives). Radford University also has a phone program where students work in the call center and make calls to certain groups (one night it may be college of science and technology parents) and asks for donations as well as gives updates relevant to the constituent and their college or major. Aside from technology and mail, Radford University has a team of development officers, or fundraisers, specific to each college at Radford, who create a portfolio of donors that they wish to cultivate relationships with and secure gifts. These individuals are in charge of larger gifts, over \$1000, which are considered “major gifts” and are usually secured after a process of developing a relationship and courting the donors. The development officers will initiate meetings over a meal, or visit a donor at their home or office, once given consent. There are a multitude of ways in which donations are secured, but finding the best method can sometimes be complex depending on the constituent.

## The Sample

Group 1 – Questionnaire	Group 2 – Interviews	Group 3 – Virtual Workshop
Baby boomer alumni Millennial alumni  200 possible participants  Participated: 65 started, 60 completed	Advancement Team  28 possible participants  Selected: 8 interview participants	Advancement Team  28 possible participants
Criteria: <ul style="list-style-type: none"> <li>Does not request no contact (mail, email, phone)</li> <li>Is not serving on university board</li> <li>Does not already exist in a gift officers' portfolio</li> <li>Is not a major donor</li> <li>Has an email address on file</li> <li>Has given at least \$1000 within the last 5 years</li> </ul>	Advancement Team Areas: <ul style="list-style-type: none"> <li>Annual giving</li> <li>Advancement services</li> <li>Alumni relations</li> <li>Communications</li> <li>Major gifts</li> </ul>	Design Thinking Methods used <ol style="list-style-type: none"> <li>1. Persona profiles</li> <li>2. Critique</li> <li>3. Affinity clustering</li> <li>4. Statement starters</li> <li>5. Concept poster</li> </ol>

**Table 1.**

The sample (see Table 1) for the study was comprised of three separate groups. For the first group, the researcher submitted a data request to pull all alumni constituents within the RU Raiser's Edge system with a birth year between 1946 and 1964 and a separate pull of alumni constituents with a birth year between 1981 and 2000 who did not meet a certain criterion of exclusions. The exclusions were:

- Does not request no contact (mail, email, phone)
- Is not serving on university board
- Does not already exist in a gift officers' portfolio

- Is not a major donor
- Has an email address on file
- Has given at least \$1000 within the last 5 years

This hard data was reviewed by the Director of Advancement Services, the Associate Vice President for University Advancement, and the Senior Director for University Advancement. This data pull provided information about *some* demographics, though legally the University Advancement Department cannot hold certain demographics within this system. The demographics considered and observed within the sample, chosen by the researcher were:

- Gender/sex/age
- Major
- Location

These demographic categories could be beneficial to the Advancement Department in the future to determine how to best reach constituents. The next two groups for the sample were Radford University Advancement team members. A total of eight ( $n = 8$ ) advancement team members participated in the interview portion of the research. The department as a whole was invited to participate in the virtual workshop, though it was anonymous, so the actual number of participants for the workshop is unknown.

## The Instrumentation

The researcher created a questionnaire in Qualtrics for 200 individuals, based on the survey conducted by San Diego State University (see Appendix H). Interview questions were designed by the student researcher and reviewed by the Master's thesis

committee members to improve content validity (see Appendix E). Instruments for the virtual workshop included the persona profile and concept poster templates derived from the Luma Institute (Luma Institute, 2012) (see Appendices L and M).

## The Procedure

This study was conducted virtually due to the current state of the country and the inability to meet in person in accordance with social distancing guidelines in place from the Governor of Virginia. Data collection took place February through March, 2021. The questionnaire was sent using Qualtrics, and the alumni participants were given one week from the date of sending the email to complete the survey. Consent was included in the questionnaire.

Individual interviews with eight advancement team members were conducted via zoom (see Appendix E for interview questions). The researcher sent an email asking for research volunteers and then selected a variety of team members from different areas of the department to participate in the interview in order to obtain a broad scope of opinions. Prior to the interviews, each individual was given a consent form to read and sign (see Appendix D). The researcher scheduled the interviews via email to determine times that were convenient for participants. Each interview lasted approximately 30 minutes.

The persona profiles were displayed in a common area (in the hallway on the wall outside of the researcher's office) in the Advancement Department for one week, and team members were provided with critique sheets (see Appendix J) to give their opinions on how accurate they felt these persona profiles depicted the RU millennial

and baby boomer alumni they encounter. Critique sheets were returned to an envelope located adjacent to the persona profiles.

The virtual workshop took place using Mural. The entire Advancement team was provided with a link via email to the Mural platform in order to critique the researcher generated persona profiles and statement starters. The Mural board for the workshop was held open for one week to elicit feedback. Because the researcher works in the Advancement office, consent for both the persona profiles and virtual workshop took place in a face-to-face manner.

# Results

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## INTERVIEW

The student researcher conducted eight ( $n = 8$ ) one-on-one interviews with employees from various areas of the Radford University Advancement Department about their experience with donors in regard to philanthropic engagement. In order to gain a variety of perspectives from advancement employees, the student researcher selected an employee from each of the following areas:

- Advancement services
- Communications
- Annual giving
- Alumni relations
- Major gifts
- Athletics

Though all participants are in the same department, they each deal with different aspects of the philanthropic engagement process and have very different day-to-day jobs. They all offer a different perspective on the interview questions. None of the interviews were audio or video recorded, but the student researcher did take thorough notes of all the responses from participants. No names will be used when discussing the responses from the interview participants.

Questions one and two were opinion questions, inquiring about characteristics the participants thought of when they were asked about a baby boomer or a millennial.

These questions were asked in order to set the tone for how the participants perceived each of the generations as a whole.

Similarly to the words shown to be most often used in Figure 8, some of the main words used to describe baby boomers were committed, loyal, dedicated, reliable, stubborn, resourceful, goal oriented, family centric, direct, technologically challenged, conservative, anonymous, and established. Though many of the descriptive terms were alike, their statements about baby boomers varied based on the types of interactions each individual had experienced over their lives.

“ Baby boomers tend to be shaped by strong family values, they’re traditional in their sense of giving and like to see follow through and consistency.”

“ Technologically challenged, direct and to the point with their wants and expectations.”

“ They [baby boomers] have more discretionary income and are coming into or are at retirement age.”

On the other end of the spectrum, some of the terms used to describe millennials were selfish, stifled, creative, entrepreneurial, go-getters, opinionated, materialistic, good planners, socially conscience, eager learners, rushed/busy, self-aware, curious, well-rounded, not impulsive, and less formal. The statements about baby boomers were more favorable in a sense, as much of what is assumed about millennials tends to be negative overall.

“ Their parents were too involved and it has negatively impacted work ethic of the generation overall.”

“ I think they have a tendency to be more socially conscience due in part to their exposure to so many things over their life.”

“ They [millennials] are just figuring their lives out, getting acclimated in a career or establishing a family, they aren’t focused on making things better for generations to come, they are just focused on making sure their lives are good right now.”

“ They grew up being able to google something and be provided with an instant result, bam, done move on...that’s how they expect all things in their lives to be.”

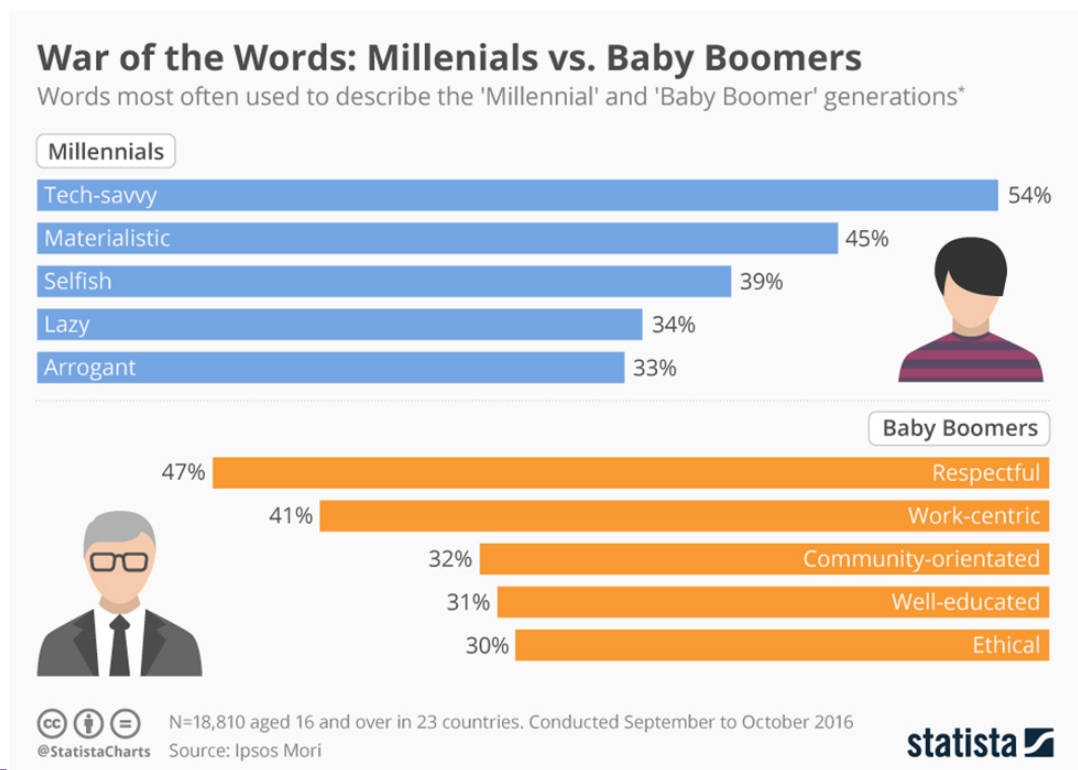


Figure 8.



Questions three through five examined how Radford University Advancement is currently appealing to baby boomer and millennial philanthropic engagement as well as existing problems within the process. Interview participants indicated that the majority of the time, when working with baby boomer donors who have higher giving capabilities, major gift officers are utilizing traditional communication channels to cultivate a relationship, and then following that up with personal visits or a “wine and dine” experience. There are events that are geared towards their likes, such as golf tournaments on a week day, where the general population of attendees are retired men. Baby boomers are responsive to the magazine and postcards, as well as items that portray feelings of nostalgia, taking them back to their Radford days. The messaging tends to be targeted on solicitations, for example, listing donation amount options that start out larger than they would on a mailing to a millennial.

“ Testimonials seem to be really effective with this generation...hearing student success stories and having a feeling that they are making a difference, as well as how, makes them more eager to give again.”

“ They really like Facebook, we see lots of interaction there, because they are online keeping up with their family, so they follow university related pages to keep up with us too. Photo and video content does well with this generation.”

On the contrary, there have not been as many techniques that seem to do well with millennials. The department thought that crowdfunding would be an effective and successful way to target millennials, but that is seen to be doing better with the baby boomer generation, which is a surprise. Graphics and design elements are captivating

for millennials, but they will not sit down and read a long narrative email about a student success story the way a baby boomer does.

“ We need to be figuring out how to meet them where they are...by that I mean quick fast and in a hurry effort of giving, like Venmo and CashApp. Those are the things they use...they don't want to sit down and type out their information, they want it to be easy, instant gratification, remember?”

“ One thing that does seem to take off with them is the peer-to-peer pushes, where they invite 3 friends or something like that, they are so used to sending a DM [direct message] and this feels similar to that.”

Question five, asking about current problems the interview participant notices with donations and engagement at Radford University, allowed for some raw and honest feedback. Though many of the responses were different in their delivery or priority area, there were many commonalities in the general scope of problems.

Some of the responses that were mentioned by more than one participant are listed:

- Annual giving major gift officer
- We do the same events we've always done
- We don't ask their preferences on acknowledgements
- Distance
- Lack of exposure
- Unawareness of matching gift opportunities
- We don't ask for their feedback
- Tracking at events is too complex

- Hard to make initial connections
- Donors drop off and we don't notice
- Focus groups could be beneficial
- Tracking contact info with millennials is so hard
- We are stretched thin, pulled in different directions

“ We are doing the same things over and over and expecting the results to be better, but people are bored with the same old thing.”

“ People have a hard time understanding the ways in which they can give, if they haven't given before. They need to be educated, but we don't have the manpower.”

“ It is hard to keep clean data when people move and we don't know, or they have a new job, all of these things create opportunities for giving, but we aren't aware so we can't do anything about it.”

The donor experience is something that can always be improved upon and tweaked in an effort to make it more successful, more streamlined, and overall, better. How donors view Radford University after making a donation will shape their further interactions, or lack thereof, based on what their initial experience feels or looks like. The university can be likened to a business as the students, parents, and donors are consumers who are receiving an experience. Students go to RU for the educational experience and to obtain a diploma. The parents are consumers because oftentimes, they are paying for the education. The donors are consumers because they are taking their money and applying it somewhere they find important. At the end of a donation

transaction, they receive some form of recognition in a letter, call, or email, and depending on the type and amount of their donation, they may be invited to an event, be sent a “thank you” gift, or their donation may get their name published in a donor book, on a building or classroom, or on a scholarship name. Not all experiences are the same, because the nature of the philanthropic engagement interactions are different, but finding a way to create a positive feeling for donors is an important piece to the experience.

When the advancement team members were asked the question, “What does a donor experience look like currently?” one word that rang loud across the board was *inconsistent*.

“ Donors make a donation online, get an email receipt, receive a letter thanking them a week later, and are asked again within 6 months.”

“ Donors who can give more receive personal attention, calls or meetings, and then have a consistent line of communication with a gift officer in order to keep the ‘door’ open for further donations.”

“ I’m sure it feels transactional to them, or insincere. They get a generic letter and then throw it away...it’s not personal so how can we expect them to feel a personal connection?”

“ They are thanked in a timely manner, then typically mailed something asking for another donation or called by TOP [telephone outreach program] to ask.”

“ Depending on the circumstances, a donor may become fully immersed or involved in an area after making a significant donation. We need more of this.”

To examine the donor experience as a whole, the advancement interviewees were asked if they thought there were ways in which the donor experience could be improved. Creating a “how to” guide for what the donor experience should/could look like would be ideal, but it is simply not a possibility. Donations can range in size and type. A donor could donate \$10 at a giving day on campus and get a free t-shirt. A donor could also give \$15,000 over the next 3 years in order to name a classroom after him or herself. These are two very different types of giving opportunities that should be treated accordingly. A gift officer is not going to prepare a proposal to ask for \$50,000 for a donor that has given \$100 annually for the last 3 years. Finding a method for sharing the emotional component in large and small ways based upon the donor is necessary to ensure the resources of the department and needs of the university are met. Advancement interviewees had the following thoughts when considering the improvements:

1. More diversity of events and donation type exposure
2. Building affinity with gift officers
3. Better metrics to analyze results
4. Sharing impact stories more broadly to the highlander community
5. Reengaging with Society of 1910
6. Giving society recognizing individuals who give consecutively
7. Personal contact from deans

8. Involving students in the donor experience (similarly to Partners in Excellence)
9. Receptions or events for smaller donors
10. Newsletters or ways to share student stories or notes

Questions eight, nine, and 10 focused on the marketing techniques found to be most successful among baby boomers and millennials as well as the trends in their communication preferences. Baby boomers are thought to respond best to traditional solicitation and stewardship, meaning mailings asking for a gift, providing an envelope to send their check, and receiving a letter of thanks from the university. They typically like tangible communication modes and are slowly starting to utilize web-based giving and technology like crowdfunding pages and Facebook posts that direct to a giving page.

“ Sending them a pretty invitation to an event is a really great way for them to feel valued and appreciated because it is old school and they like that.”

“ They [baby boomers] really prefer to give through the mail, a traditional check...and they like their receipt or acknowledgement within a week.”

“ We find that they [baby boomers] really like to get things in the mail and to read things on print, letters, newsletters, the magazine, solicitations, it feels more personal and it's what they are used to. They also are direct and to the point...they know what they want and expect.”

Millennials on the other hand do not want mail or paper items, possibly a nod to their socially conscience ways, or possibly due to their rushed and busy way of life and

lack of time to devote to reading things. They do respond well to social media posts or emails that allow them to see themselves as the student, making them feel like they need to “pay it forward.”

“ We do paid advertisements on social media and we can focus on people within ‘this many miles’ and this demographic and I want to target my marketing to that, and I only want to spend \$20, so when you hit that mark the ad shuts off. It’s really big for us.”

“ Social media posts that feel like an influencer type of thing tend to get my attention than ones that feel stuffy and lengthy.”

“ They want so bad to text-to-give but we just aren’t there yet. They want to give through Venmo and all these things where they can hold their phone up and it takes the money from their account. They don’t want to use the methods that baby boomers do.”

The last two questions asked the participant to give their opinion on the most ideal way to appeal to baby boomers and millennials based on their experience as an advancement professional. Half of the participants worked at other institutions and have seen and utilized other fundraising methods that differed from RU and hearing their personal feedback was important and beneficial. When attempting to appeal to a baby boomer, participants had the following to say:

“ We need to be focusing more on IRA rollovers, retirement situations, looking into being added to their will, those longer term commitments to us.”

“ The donors that can afford to give more, often are looking at the tax incentives and we should be capitalizing on that as way to make a bigger ask.”

“ They truly enjoy seeing their impact on future generations so inviting them to things like Partners in Excellence is meaningful and beneficial. They meet their student that has benefited from the scholarship, form a bond, and want to continue investing in the lives of other students. Many times, it's that they see themselves in the young generation, and it becomes more personal.”

“ Consistency. We have to be consistent in our outreach and communication. There is no follow through from them if there isn't follow through from us.”

Appealing to the millennial generation may be increasingly difficult due to changes in technology. What works or what they want now, may not be what they continue to want.

“ We have got to figure out how to make this text giving or app-giving mode of fundraising a thing. Otherwise we aren't going to ever capture that group.”

“ They have to see big impacts quick, instant gratification is the name of the game with millennials, they want to spend less time interacting and more time texting, so let's text them.”

“ We need to be branching out into other social media platforms or else our Facebook and twitter posts as outreach will stop being seen by the younger generations. The baby boomers are the ones moving into Facebook now, not the millennials. They value their privacy and have deactivated their accounts.”



“ Crowdfunding isn’t taking off, so how can we make it work? What is the next thing that’s going to work with this crew...I don’t know that yet. But we need to find out.”

## SURVEY

The questionnaire was sent to 200 Radford University alumni. Of the 200 alumni, 100 were born between 1946 and 1964 and 100 were born between 1981 and 2000. Alumni birthdates are on file within each individual’s constituent record and are accurate, as they are collected from the Banner system used by the university. To narrow down the number of participants, there were parameters put in place and agreed upon by the researcher, the Director of Advancement Services, Wendy Lowe, and the Vice President for Advancement, Wendy Lowery. Those parameters are as follows:

- Does not request no contact (mail, email, phone)
- Is not serving on university board
- Does not already exist in a gift officer’s portfolio
- Is not a major donor
- Has an email address on file
- Has given at least \$1000 within the last 5 years

There was a total of 455 baby boomers that met the criteria set for the query. The student researcher sorted this spreadsheet from greatest to smallest by total lifetime giving, then pulled the emails for the top 100 baby boomers. These are the participants that were included in the email survey. Naturally, the millennial list was substantially

smaller, with just 169 alumni who had given at least \$1000 in the last 5 years. The researcher used the same method for sorting and selected the top 100 donors of that category to include in the email survey. To give a visual of how these were sorted, the table (see Table 2) shows the total lifetime giving for the top 25 donors in each of the generation categories. Understandably, the figures in the image on the left are higher, as baby boomers have had longer to contribute than the millennial donors displayed in the image on the right.

Lifetime Gifts	Lifetime Gifts
20,968.27	25,000.00
19,811.52	5,000.00
15,263.32	3,664.58
14,115.90	3,150.00
13,288.00	3,102.99
12,350.00	2,925.99
11,675.00	2,750.00
11,362.62	2,540.00
10,786.12	2,080.00
10,385.00	1,475.00
9,689.00	1,460.00
9,080.00	1,357.00
7,856.50	1,350.00
6,986.00	1,350.00
6,653.00	1,295.00
6,182.21	1,280.00
5,850.00	1,275.00
5,800.00	1,260.00
5,683.00	1,250.00
5,590.00	1,250.00
5,415.00	1,250.00
5,370.00	1,221.84
5,110.00	1,200.00
5,025.00	1,155.00

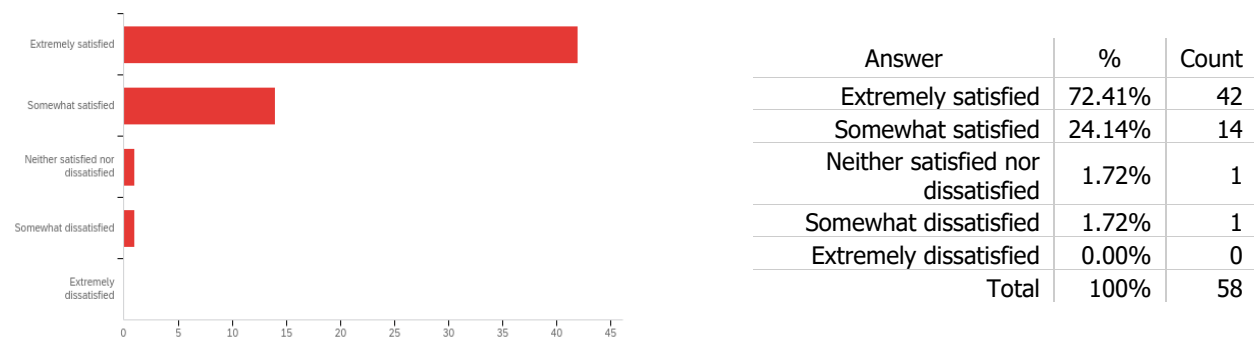
**Table 2.**

The survey email was distributed at 7:50 a.m. EST on Wednesday, March 3, 2021, followed by a reminder email to 164 unfinished respondents at 7 a.m. EST on Monday, March 8, and another final reminder email to 146 unfinished respondents at 9:30 a.m. EST Tuesday, March 9. The survey closed on Wednesday, March 10 at 7:50

a.m. EST. The researcher chose to leave the survey open for one full week due to the conversations had with other members of the University Advancement team. There are a variety of emails sent to donors, and the team decided it was best to use a short time frame so there were no conflicts with other emails from the department. A total of 65 surveys were started, with 60 completed, giving a completion rate of 92% based on surveys started. Of the surveys completed, 22 of them were millennials, 34 were baby boomers, and the other 4 did not wish to disclose their age.

The first two questions of the survey looked at the experience the participants had as students (see Figure 9 and Table 3) and their overall feelings today (see Figure 10 and Table 4). While they both show participants leaned more towards the “extremely satisfied” and “extremely positive” end of the spectrum, it is clear that some feelings have changed. The advancement team discussed how it is possible that someone had a great experience as a student, but not a great experience as an alumnus and vice versa.

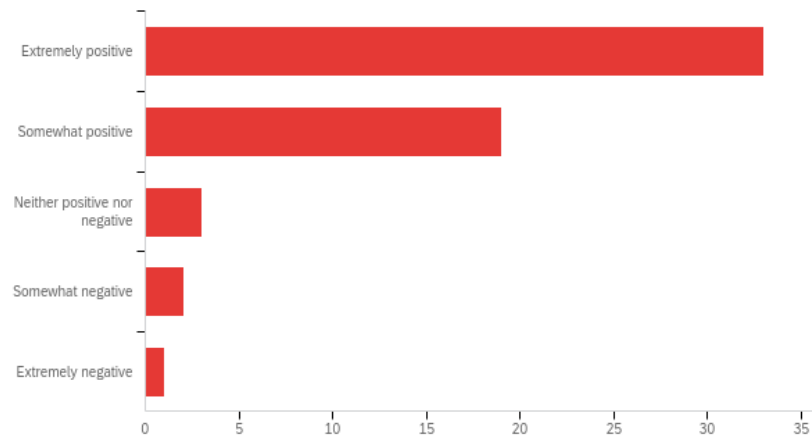
### Q1 - How satisfied are you overall with the experience you had as a student at Radford?



**Figure 9.**

**Table 3.**

## Q2 - How would you describe your overall feelings about Radford University today?



**Figure 10.**

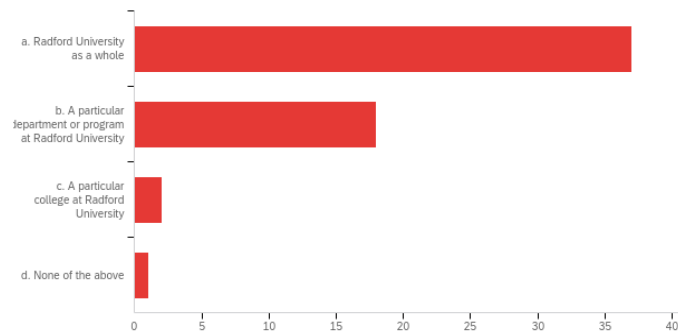
Answer	%	Count
Extremely positive	56.90%	33
Somewhat positive	32.76%	19
Neither positive nor negative	5.17%	3
Somewhat negative	3.45%	2
Extremely negative	1.72%	1
Total	100%	58

**Table 4.**

Question three asked about affiliation to determine alumni identified categories. This is important to examine because while many times the Advancement Department segments by college, program, or affinity group, looking at the differences among generations may be more beneficial. Of the participants, 63.79% stated that they identify most closely with the university as a whole and not a particular program or college; of those, 13 were baby boomers and 23 were millennials. These sometimes can be the forgotten individuals that are not observed closely because it is assumed they would group themselves with a department, program, or college, but they only *truly*

group themselves with Radford University. Segmenting by ages and generations could play a role in some significant discoveries for the university in regard to what alumni want.

### Q3 - With which do you identify most closely?



**Figure 11.**

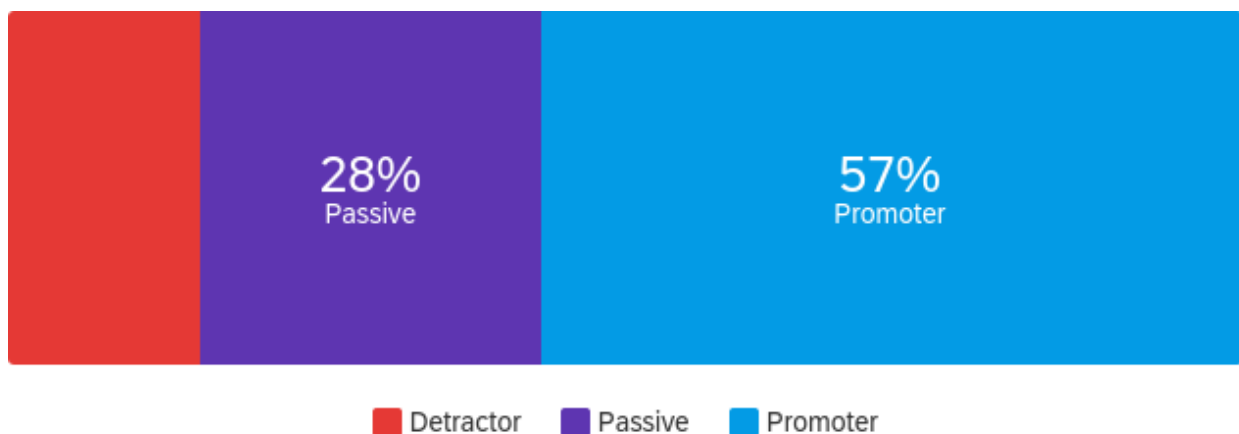
Answer	%	Count	Baby Boomers	Millennials
a. Radford University as a whole	63.79%	37	23	13
b. A particular department or program at Radford University	31.03%	18	12	7
c. A particular college at Radford University	3.45%	2	0	2
d. None of the above	1.72%	1	0	1
Total	100%	58	35	23

**Table 5.**

Question four and five were geared towards the type of donor this alum is. The question of likelihood of recommending Radford to a prospective student is crucial when the Advancement Department works towards securing alumni volunteers and engaging an alum for participation in new student events or programming. It is not ideal to ask someone to be an alumni volunteer and write postcards to future students or participate in an admissions open house if he or she is not likely to recommend the school in the first place. Additionally, understanding who is of most interest to alumni (e.g., students, president, deans, etc.) was important. The rainbow chart (see Figure

13) shows that almost half of the participants are most interested in hearing current students' perspectives on the needs and challenges of the university. This is a large number and deserves attention. If a donor is basing his or her philanthropic engagement on the perspective of current students, it becomes the utmost importance to make sure that students' experiences at Radford University are pleasant ones. The chart also shows that the opinions and perspectives of past alumni and deans of the colleges play little role in the interest of the donors. The president and faculty's perspective show to be of interest to survey participants, but not nearly as much as that of current students.

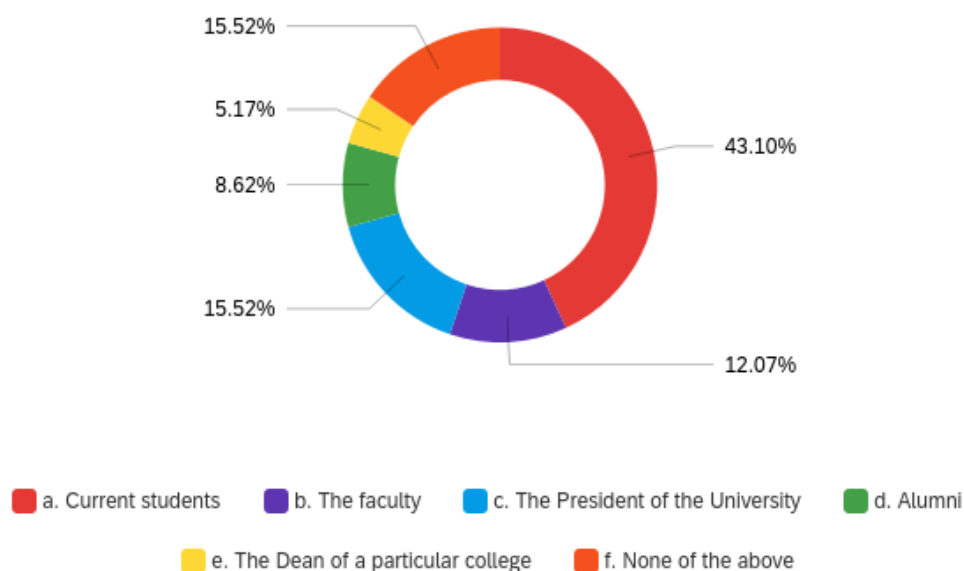
**Q4 - If you were asked, how likely would you be to recommend Radford University to a prospective [undergraduate/graduate student] of your own interests and background?**



**Figure 12.**

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**Q5 - In general, whose perspective on the University's needs and challenges is of most interest to you?**



**Figure 13.**

Question six asked about what degree participants received from Radford University. Of the 60 participants, 44 received undergraduate degrees, 4 received graduate degrees, 10 received undergraduate and graduate degrees, and 2 received undergraduate degrees and a certificate. This question, though only about degrees, illustrates devotion to Radford University as there were 12 of 60 participants who had an experience as an undergraduate that made them come back for another degree. Return students are important pieces to the puzzle because they have spent a greater amount of time at Radford, with the faculty and on campus, and are often seen to be great champions for the university and its future. These are individuals that typically are annual donors and participate in events and engagement on campus.

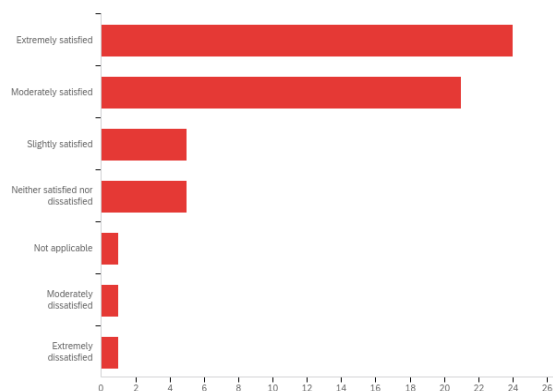
### Q6 - What degree(s) did you receive from Radford University?

Answer	%	Count
Undergraduate	77.14%	54
Graduate	20.00%	14
Ph.D.	0.00%	0
Certificate	2.86%	2
Total	100%	70

**Table 6.**

Questions seven and eight surrounded around the feelings donors have after they make a gift to the university as well as their rate of involvement. The graph below (Figure 14 and Table 7) shows that over 40% of participants are extremely satisfied after making a gift to Radford University with 18 (n = 18) of them being baby boomers and six (n = 6) being millennials. This is an important factor when investigating donors' feelings towards giving as the goal is to keep alumni happy so they will continue to give. The next table (Table 8) for question eight pertains to alumni involvement, to which most participants stayed occasionally involved, with an almost equal number of people responding with "rarely" involved and "regularly," which is quite interesting.

### Q7 - How do you feel after making a gift to Radford University?



**Figure 14.**



Answer	%	Count	Baby Boomers	Millennials
Extremely satisfied	41.38%	24	18	6
Moderately satisfied	36.21%	21	9	11
Slightly satisfied	8.62%	5	4	1
Neither satisfied nor dissatisfied	8.62%	5	2	3
Not applicable	1.72%	1	0	1
Moderately dissatisfied	1.72%	1	1	0
Extremely dissatisfied	1.72%	1	1	0
Total	100%	58	35	22

**Table 7.**

#### Q8 - How would you rate your involvement with Radford University today?

Answer	%	Count	Baby Boomers	Millennials
Not involved	13.79%	8	5	3
Rarely involved	24.14%	14	9	4
Occasionally involved	34.48%	20	13	7
Regularly involved	25.86%	15	7	7
Prefer not to answer	1.72%	1	1	0
Total	100%	58	35	21

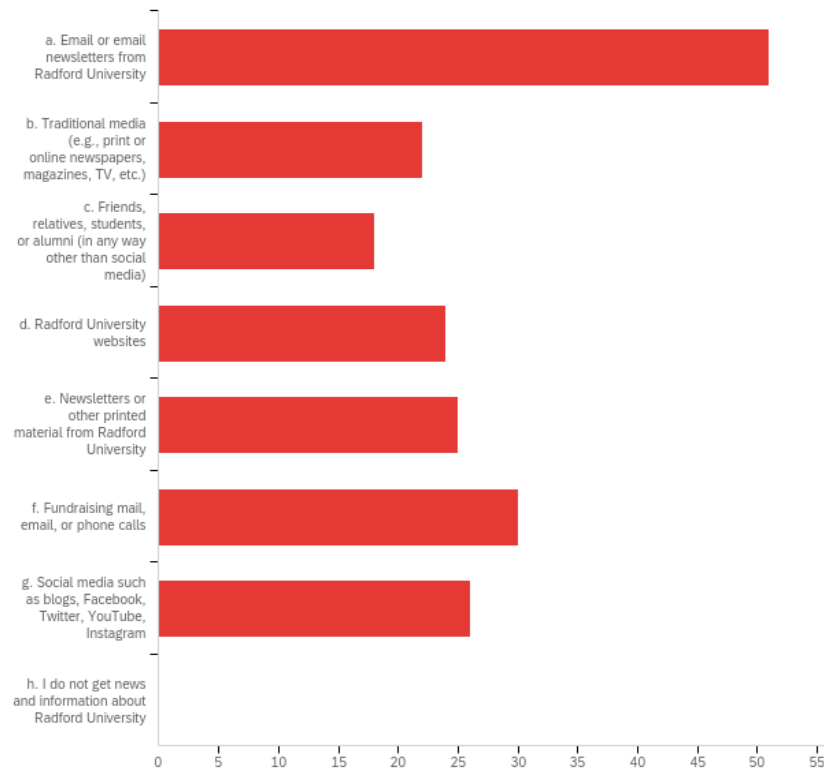
**Table 8.**

The Advancement Department at Radford University uses a variety of channels in regard to news, information, and updates. Understanding how alumni wish to be engaged is extremely important so that there is not an overload of information, unwanted communication, or a waste of valuable time and money on communication efforts. When asked where alumni get information about Radford University, a total of 196 responses from 60 alumni indicates that the largest majority (n = 51) obtain information through emails or newsletters. Of those 51, 30 were baby boomers and 20 were millennials (1 answer came from a participant who did not wish to disclose age). When looking at the two pie charts, baby boomers (see Figure 16) show a fairly even distribution of their preferred methods for obtaining information. Their top three

preferred methods are email or newsletters, printed materials, and fundraising communications. Millennials (see Figure 17) are similar in that their top two preferences are email or newsletters from the university and fundraising communications but differ in that their third preferred method is social media, such as blogs, Facebook, Twitter, YouTube, and Instagram. This data comes at no surprise, as this younger generation (millennials) grew up with social media and looks to it for information and communication options. One interesting finding about millennials is that they seldom look to traditional media (print, newspapers, magazines, TV) for information, nor do they look to printed newsletters or mailings. Understanding the primary modes of information serves the Advancement Department an opportunity to cut back on expenses in regard to unnecessary mailings. Recognizing what works for the specific generation to be solicited can help in determining how to reach them, and what they are most likely to respond to.

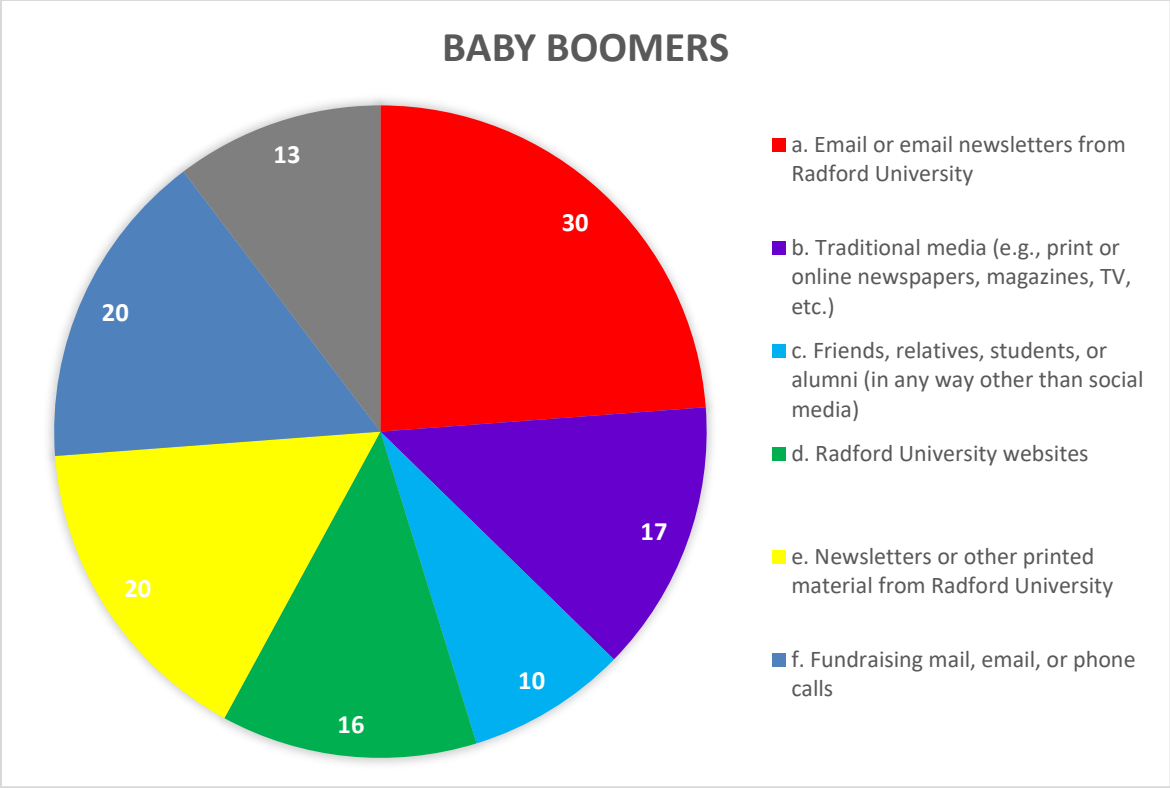
**Q9 - Where do you get news and information about Radford University?**  
**[CHECK ALL THAT APPLY]**

**Figure 15.**

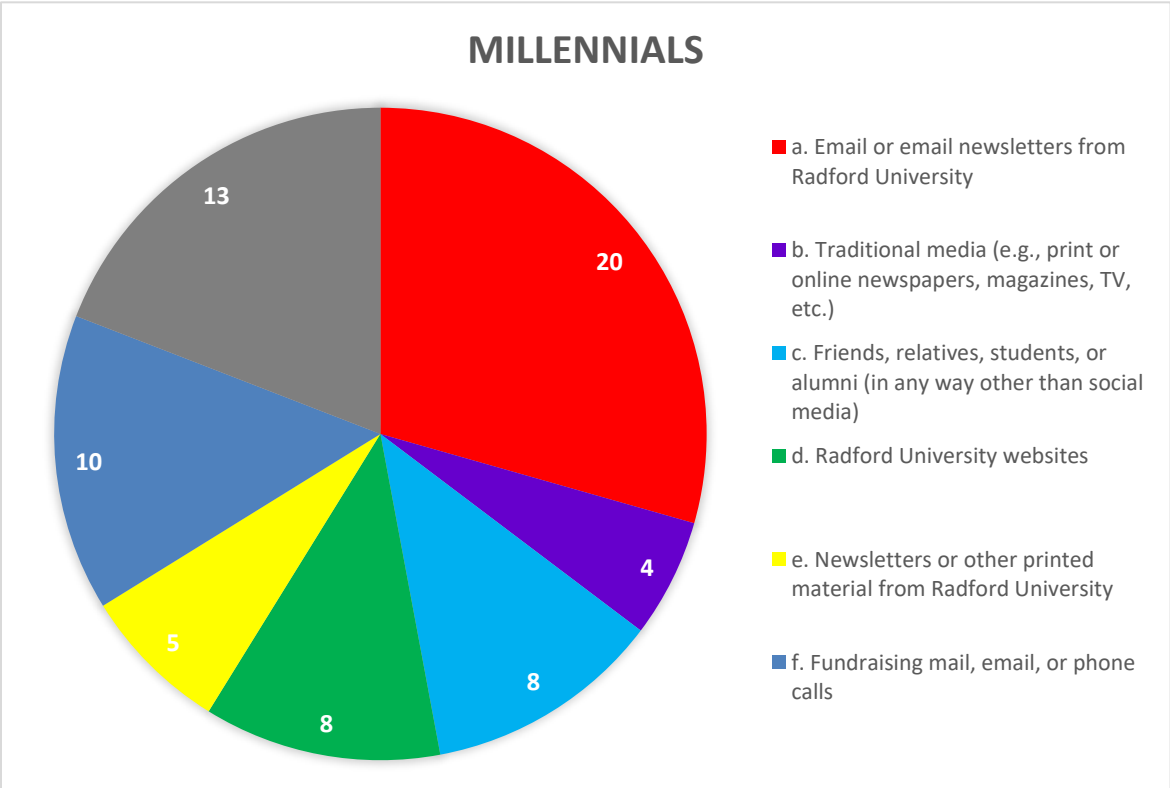


Answer	%	Count
<b>a. Email or email newsletters from Radford University</b>	<b>26.02%</b>	<b>51</b>
b. Traditional media (e.g., print or online newspapers, magazines, TV, etc.)	11.22%	22
c. Friends, relatives, students, or alumni (in any way other than social media)	9.18%	18
<b>d. Radford University websites</b>	<b>12.24%</b>	<b>24</b>
<b>e. Newsletters or other printed material from Radford University</b>	<b>12.76%</b>	<b>25</b>
<b>f. Fundraising mail, email, or phone calls</b>	<b>15.31%</b>	<b>30</b>
<b>g. Social media such as blogs, Facebook, Twitter, YouTube, Instagram</b>	<b>13.27%</b>	<b>26</b>
h. I do not get news and information about Radford University	0.00%	0
Total	100%	196

**Table 9.**



**Figure 16.**



**Figure 17**

Asking donors about their interests and how to be involved allows fundraisers and the alumni relations department to appropriately pair alumni with events and outreach opportunities where they would like to be active. If the Advancement Department is contacting an alumnus regularly about job and career services or mentoring opportunities with students, and that is not his or her interest, it can easily and quickly turn the individual off from participating on campus. In addition to communication for engagement opportunities, understanding alumni preferences can also give insight into where they might consider donating, whether it be to a specific college, organization, or scholarship. Creating flexibility and freedom for alumni to focus on what interests them enriches the community experience that returning alumni feel when they come to campus or participate in events. The table for question ten (Table 10) shows what areas and activities baby boomers and millennials are interested in being involved with at Radford University. Baby boomers and millennials are both most interested in staying informed about campus news and attending sports events, while millennials also show great interest in mentoring current RU students or recent grads. Baby boomers and millennials also seem to be similar in their lack of interest in job/career services and online access to university resources. A significant number of both baby boomers and millennials are uninterested in attending faculty talks or other educational, intellectual, or cultural focused events. Recognizing trends in the interests of generation groups helps the Advancement Department, and the university as a whole, plan events based on who the target demographic is.

### Q10 - How interested are you in the following ways to stay involved with RU?

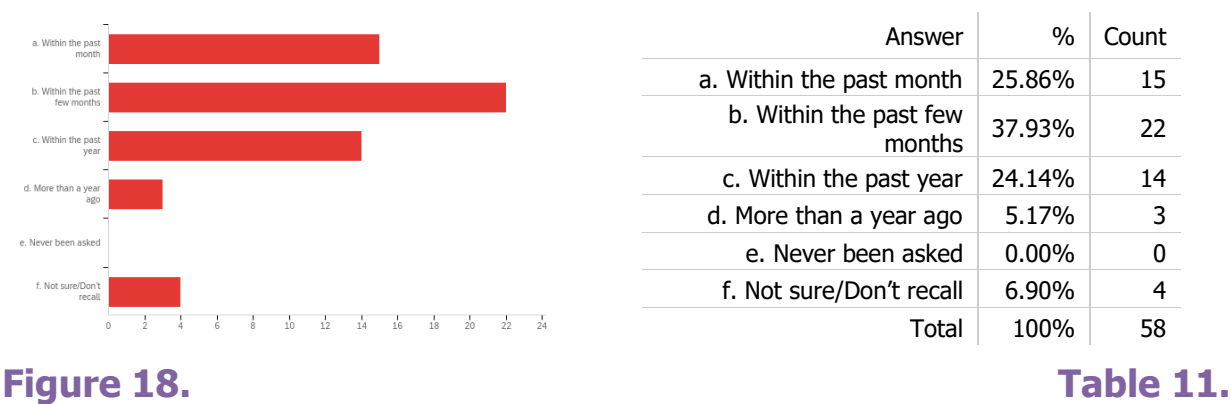
Question	Very		Somewhat		Not Interest	
	Baby Boomers	Millennials	Baby Boomers	Millennials	Baby Boomers	Millennials
a. Staying informed about campus news and what's happening at Radford University	19	8	13	13	1	1
b. Online access to University resources (e.g., library databases, historical documents, etc.)	7	5	9	7	16	10
c. Socializing or networking with Radford University alumni	9	8	11	8	12	6
d. Attending faculty talks or other events with an educational, intellectual, or cultural focus	5	4	12	10	15	8
e. Attending events organized around Radford University sports	10	9	9	4	13	9
f. Job and career services for alumni	1	4	10	7	21	11
g. Mentoring current Radford University students or recent grads	4	6	14	11	14	5
h. Helping attract and recruit prospective students	4	6	12	6	15	10

**Table 10.**

Questions 11, 12, and 13 center around communication and preferences of monetary donation usage. Understanding when and how donors are being contacted about donation opportunities as well as their feelings on communicating where money is being spent plays a large role in a donor's decision to continue his or her monetary

contributions to Radford. The graph (Figure 18) from question 11 speaks volumes to advancement professionals about their frequency of communications as more than 75% of respondents indicate that they have been communicated with sometime in the past year, with 25% stating they have been contacted in the past month. Regular communication without over communicating ensures donors do not “fall off” or get forgotten over time and end up feeling like they are not important. In addition to communication frequency, understanding how a donor feels the department has done in their efforts to communicate fundraising priorities, impacts of gifts, beneficiaries, and location of gift, as well as allocation is imperative. More than 60% of total respondents to all four categories indicated that they felt the university was doing either “extremely good” or “somewhat good” at communicating, this can be seen in Table 12. There was a slim number of individuals who stated “extremely bad” for areas of who beneficiaries are and where gifts go. Participants selected A, B, C, and E as the top three choices for where they would allocate money shown in Table 13.

**Q11 - When was the last time you were asked (by mail, email, phone, or in person) to make a financial donation to Radford University?**



**Q12 - How good of a job do you feel Radford University is doing at communicating to you...**

Question	Extremely good		Somewhat good		Neither good nor bad		Somewhat bad		Extremely bad		Total
a. Its fundraising priorities	35.09%	20	40.35%	23	21.05%	12	3.51%	2	0.00%	0	57
b. The impact gifts have on Radford University	36.84%	21	36.84%	21	22.81%	13	3.51%	2	0.00%	0	57
c. Who the beneficiaries of gifts to Radford University are	34.48%	20	31.03%	18	18.97%	11	13.79%	8	1.72%	1	58
d. Where gifts go and how they are used	29.31%	17	32.76%	19	17.24%	10	15.52%	9	5.17%	3	58

**Table 12.**

**Q13 - If it were up to you to decide where money went, which three of these objectives would you allocate the most money to? (please select three)**

**Table 13.**

Answer	%	Count
<b>a. Attracting and retaining the best faculty who can lead innovation and discovery</b>	<b>17.47%</b>	<b>29</b>
<b>b. Building on Radford University's strengths in its leading research and academic programs</b>	<b>13.86%</b>	<b>23</b>
<b>c. Assisting students to be day-one job ready when they graduate</b>	<b>19.28%</b>	<b>32</b>
d. Helping offset the impact of state budget cuts	4.82%	8
<b>e. Creating opportunities for students with financial need</b>	<b>17.47%</b>	<b>29</b>
f. Supporting Radford University's athletics programs and student athletes	9.64%	16
g. Helping Radford University make an impact on issues of importance to Virginia	4.82%	8
h. Helping Radford University make an impact on issues of global importance	3.01%	5
i. Expanding study-abroad and other international opportunities for students	2.41%	4
j. Building Radford University's endowment	7.23%	12
Total	100%	166



Understanding how a donor wishes to contribute is extremely important in the Advancement Department. Some donors prefer to mail in a check, hand deliver a check, call with a credit card they give over the phone, mail in a form with a credit card, or process the credit card themselves. Within the Raiser's Edge system, advancement team members can see how donors have given in the past as a way to understand how they may like to give moving forward. Figures 19 and 20, as well as Table 14 displays the preferred method of giving among the alumni surveyed. The greatest majority of alumni say they prefer to give online. This may be the easiest for them, or feel the most secure. Of the responses, 20 came from baby boomers and 18 came from millennials, showing they are quite similar in their preference. Where they differ slightly is in the category "check in the mail," showing that only three millennials say they prefer to give this way, while 11 baby boomers would rather mail a check. Baby boomers continue to want to receive mailed solicitations and then send their check donation back in the prepaid BRE, or business reply envelope. This has been a major giving method for years and will likely continue, at least to the older generations. The data collected gives the Advancement Department the opportunity to evaluate how and why they are soliciting the way they are, and what they can do to make changes so that donors feel heard, and to choose the most effective and efficient way to send solicitations. This can have an impact on expenses for the department as well if they can cut down on mailings. Another area that the Advancement Department can look closely at in this survey is the "credit card donation I make over the phone" category. Only three baby boomers and one millennial select this as a preferred method. This method of giving has shown over

the years to decrease steadily, as people do not wish to talk on the phone, or answer calls from numbers they do not know. Determining whether phone calls are effective can serve as a way to cut costs within the department, as the TOP or Telephone Outreach Program employs students who make calls to alumni, parents, and friends. This is a significant area of expense and may not be beneficial overall.

#### Q14 - What is your preferred method of making a donation?

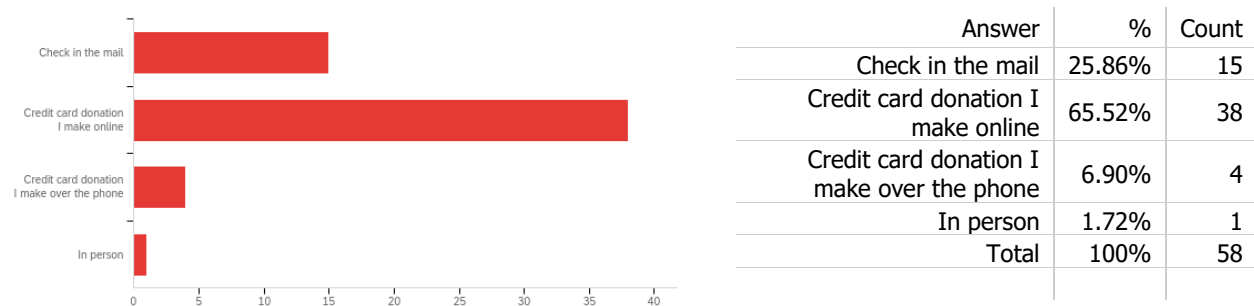


Figure 19.

Table 14.

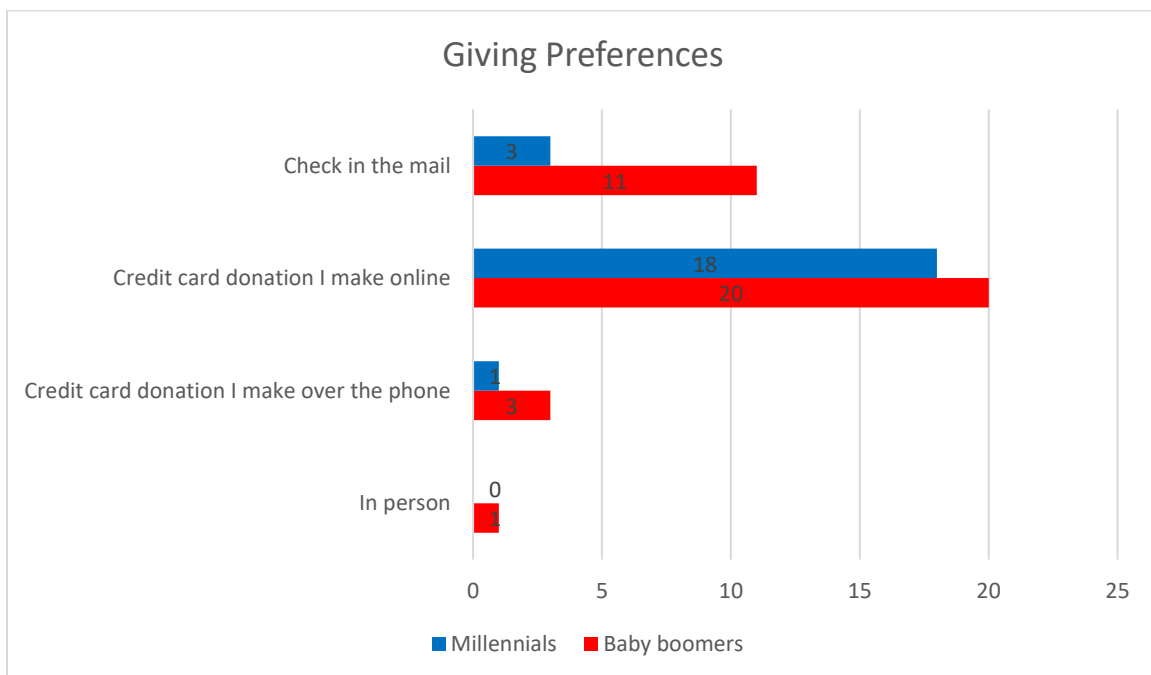


Figure 20.

The decision to donate money is a very personal one, and oftentimes, the decision to do so is based on factors not known by the solicitor. Understanding what a donor is thinking when making a gift is an important part of the philanthropic engagement process. The table below (see Table 15) shows weight placed on thoughts a donor might have when making a gift. A number of alumni did not know where or how their contribution was used. This is an important finding that the Advancement Department needs to consider by providing increased transparency to donors.

**Q15 - How much does each of the following considerations weigh in your decision when asked to make a gift to Radford University?**

Question	A great deal		A moderate amount		None at all	
	Baby Boomers	Millennials	Baby Boomers	Millennials	Baby Boomers	Millennials
1. I don't know where my contributions go or how they are used	11	3	7	14	16	4
2. Giving to Radford University takes money away from my loved ones	1	4	3	4	30	14
3. My money has greater impact on other organizations	1	1	11	10	22	11
4. Money given to Radford University is wasted on non-essential programs	4	1	7	5	22	16
5. I feel my obligation to Radford University was fulfilled by paying tuition	2	1	2	5	30	16
6. I'm not sure how making a gift benefits me now	1	0	4	1	29	21
7. Radford University just doesn't need my money as much as other organizations do	1	1	10	6	23	15
8. Radford University can always count on its wealthier alumni and friends to provide adequate support	2	4	5	2	27	16
9. I don't support Radford University because I object to certain policies or decisions it has made	1	2	6	1	27	19

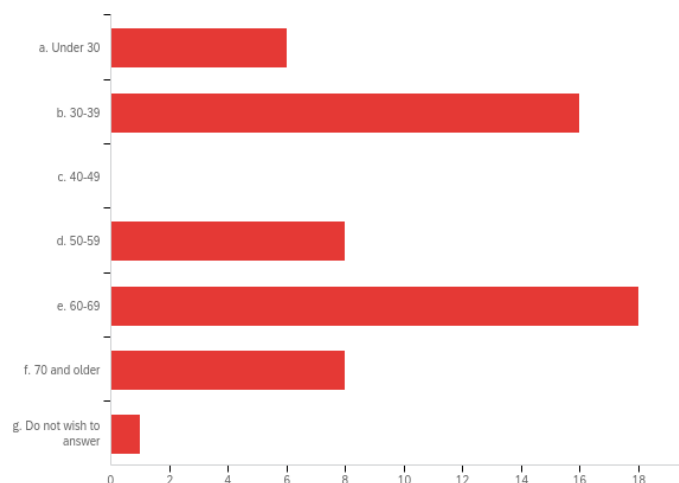
**Table 15.**

Questions 16 and 17 of the survey were pertaining to donations alumni make to other charities or nonprofits, and on the ages of participants in the survey. The two alumni donor groups surveyed contained birth years from 1946 to 1965 and 1981 to 2000, so this question was added to ensure no participants outside of those years were included. The results from question 16 (see Table 16) were not terribly surprising, as all but two baby boomers (who chose “prefer not to say”) indicated that they give on a regular basis to other charities or organizations, while three of the 23 millennials stated that they do not give anywhere else.

**Q16 - Apart from Radford University, do you give money on a regular basis to any charities or other not-for-profit organizations?** **Table 16.**

Answer	%	Count	Baby Boomers	Millennials
Yes	86.21%	50	33	17
No	5.17%	3	0	3
Prefer not to say	8.62%	5	2	3
Total	100%	58	35	23

**Q17 - What is your age?**

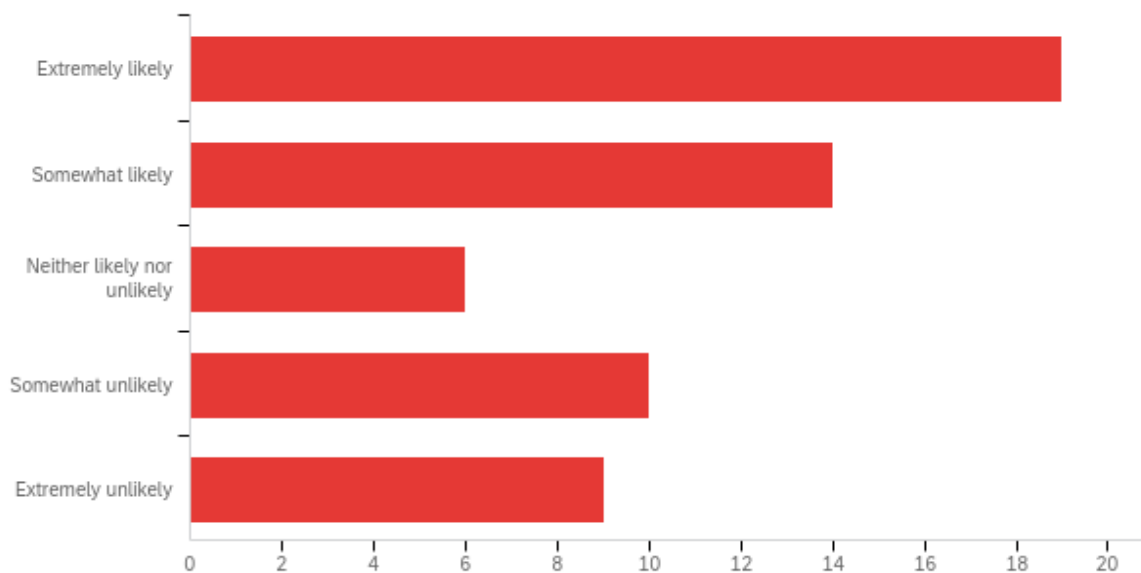


**Figure 21.**

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The next questions of the survey were about events held by the university. Figure 22 shows the likelihood of an alumni to attend an event. There are a variety of events held on campus, and noticing trends in the generations that participate in these events is important in order to ensure they are purposeful. Additionally, alumni were asked about their likelihood to make a gift (see Table 17). The figure and table show that attending an event does not have an impact on the likelihood of an alum donating as the majority of participants chose “neither likely nor unlikely.” There is a slim margin of participants who stated they would be extremely likely to donate. More millennials (n = 9) stated that they would be “somewhat likely” to make a donation after attending an event.

**Q18 - How likely are you to attend a Radford University event?**



**Figure 22.**

---

**Q19 - After attending a Radford University event, how likely are you to make a donation?**

Answer	%	Count	Baby Boomers	Millennials
Extremely likely	10.53%	6	5	1
Somewhat likely	28.07%	16	6	9
Neither likely nor unlikely	54.39%	31	20	11
Somewhat unlikely	0.00%	0	0	0
Extremely unlikely	7.02%	4	3	1
Total	100%	57	34	22

**Table 17.**

The last question of the survey asked participants whether they had comments or suggestions about how Radford University could be more relevant to their life today. A total of 13 participants took advantage of this comment box and gave feedback. Some feedback received are listed below:

“ I give \$100 annually to support my department, Communication Disorders, as I got an excellent education and want to continue to support the profession.”

“ Keep the alumni engaged!”

“ Wish I had the financial means to do more.”

“ I don’t live in Virginia, but I still donate annually. I am grateful for my education.”

“ I support Radford and think they continue to do a good job with student life and keeping up with alums.”

“ I absolutely loved my undergraduate experience at Radford. The only reason I don't participate in networking events is because I still stay in touch with all my friends from college. My husband (VT grad) and I choose to donate to our colleges because we are grateful for the experiences we had while there.”

“ Including emails/other communications about what is posted on the website; information about achievements of students and faculty and who the school's ranking is improving or not, what support the General Assembly is giving, how many students are on scholarship and what scholarship need is among students.”

## VIRTUAL WORKSHOP

Following the completion of the interviews with advancement staff and the survey sent to Radford University baby boomer and millennial alumni, the university advancement staff was invited to participate in a virtual workshop (including the persona profile critique) during the course of the week. They were sent an email asking for their participation in the critiquing of the persona profiles, followed by an invitation link to the Mural board labeled as feedback grid, and another labeled “how might we...” where participants were able to brainstorm ideas for how to improve the philanthropic engagement as a whole. The critique sheets completed by participants did not indicate changes or modifications to be made to the personas.

Participants indicated that these three personas within the baby boomer and millennial categories personified the alumni at Radford University. The image (see Figure 23) shows the persona profiles on the wall outside of the student researcher's

office as well as the consent form. The critique sheets, pens, and the folder to place them in were on a chair at the door right below.

**Figure 23.**



The persona profiles, developed by the student researcher, included a quote from each persona, as well as their general description, and their attitudes and goals towards the concept of philanthropic engagement. The personas were based on the questionnaire results from alumni and the interviews conducted with advancement team members. Understanding donors within a generation gives the opportunity to create ways to communicate, cultivate, and solicit each of them. Educating alumni on the opportunities for donations, as well as events in their area they may be interested in becomes a bit easier if there is an understanding of how donors wish to be approached or what their areas of concern are. The personas are shown as follows.



**Figure 24. Persona Profile – Denise (Baby boomer)**

NAME:

# Denise



I have such fond memories at Radford & met my husband there, I hope all students walk away loving it as much as I do.

ATTITUDES:

Please dont forget to mail me a magazine, I love reading about things going on

I dont need the recognition, but love meeting students impacted by my gifts

GOALS:

I love seeing the advancements Radford is making

Donating to scholarships feels so special and meaningful

GENERAL DESCRIPTION:

66 Years old

Married

Master of Business Administration

Gives Annually & Highlander Club Member

Recently retired

Location: Richmond, VA

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**Figure 25. Persona Profile – Lisa (Baby boomer)**

NAME:  
**Lisa**

PORTRAIT:  


I stay connected to my college friends already, I dont need to come back to campus

ATTITUDES:  

I unsubscribed all because I am contacted too much

What I can contribute wont make a big difference

GENERAL DESCRIPTION:  

58 years old	Divorced
Communication Degree	Salary \$60K
Small Business Owner	Location: Christiansburg, VA

GOALS:  

I dont need new connections or to stay updated about Radford

I am still paying for my daughters Radford education

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**Figure 26. Persona Profile – Robert (Baby boomer)**

NAME:

Robert

PORTRAIT:


I get too many emails asking me to give to different funds, I already give where I want to.

ATTITUDES:

I enjoy the alumni golf tournament and homecoming weekend

I have a relationship with a gift officer and prefer to deal with them on most things

GENERAL DESCRIPTION:

61 years old

Prefers to meet in person

Master of Science in Strategic Communication

Attends Partners in Excellence & all major donor events

Major Donor

Location: Roanoke, VA

GOALS:


I am currently discussing a possible naming opportunity

I plan to include Radford in my will

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**Figure 27. Persona Profile – Nick (Millennial)**

NAME:

Nick

PORTRAIT:



ATTITUDES:

Please don't call me, i prefer a text

if i donate, i like a receipt within 24 hours

GENERAL DESCRIPTION:

32 years old

Married

Business degree

Salary \$60K

Pharmaceutical Sales

Location: Virginia Beach

GOALS:

I'll attend an event when it is in my area, but i dont travel back to Radford

I like to donate to emergency need funds

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**Figure 28. Persona Profile – Josh (Millennial)**

NAME:

Josh

PORTRAIT:



ATTITUDES:

I received a scholarship and still stay in touch with the donor

I dont see myself making any trips back to campus in the near future

GENERAL DESCRIPTION:

25 years old

Single

Design Degree

Salary \$55K

Graphic Designer


Location: Washington, DC

GOALS:

I'd like to receive communications about RU and maybe mentor a student

I wouldnt mind learning more about a small monthly donation I could make

My family didnt help me pay for my education, so I still have a lot of loan debt

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**Figure 29. Persona Profile – Kayla (Millennial)**

NAME:

Kayla

PORTRAIT:



ATTITUDES:

I've moved a few times, so i dont think you have my correct address

I wish it were easier to donate, like through venmo or cashapp

GENERAL DESCRIPTION:

28 years old

Married

Psychology degree

Salary \$30K

Spa Office Manager

Location: Roanoke, VA

GOALS:

Seeing the updates happening at my alma mater makes me want to go back for my grad degree

Scholarships were important to me, so i try to contribute to those when i can

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University advancement employees then participated in a virtual workshop contained within Mural. The templates provided to participants had a section for baby boomers (see Figure 30) and millennials (see Figure 31) and were divided into four sections:

- Worked well
- Needs to change
- Unanswered questions
- New ideas to try

These sections and the anonymity of the Mural boards allowed participants to freely express their feedback without judgement from other teammates. This Mural board did not get as much feedback or attention. Much of the information contained on the feedback grids was similar to the interview responses and was somewhat generic and not as detailed overall. Unfortunately, the responses, though beneficial, did not provide real solutions or possible new giving insight in regard to Radford University alumni donors. Although the student researcher informed participants that their responses were anonymous, the majority of comments were short and lacked detail.

Figure 30. Feedback Grid – Baby Boomers

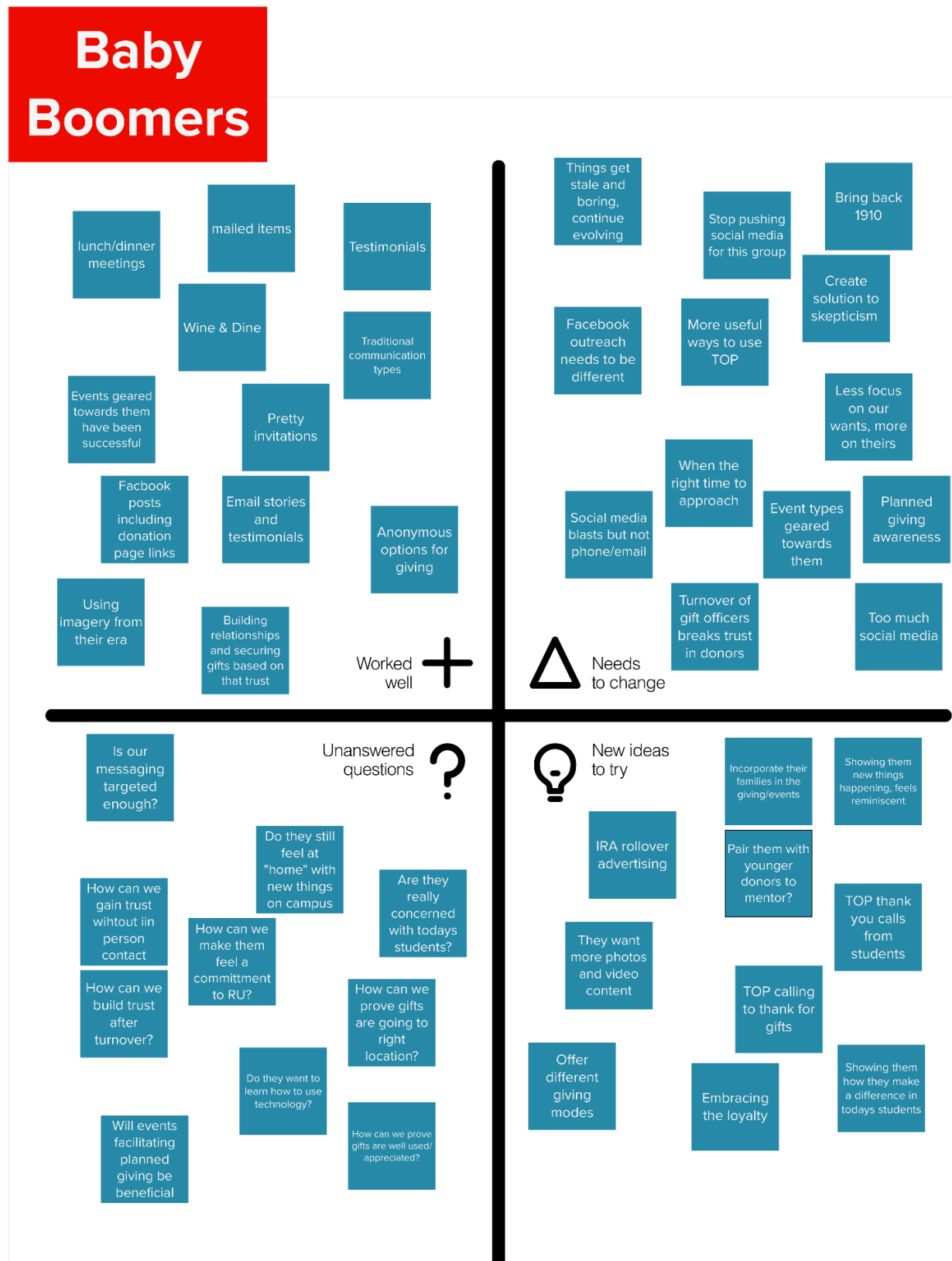
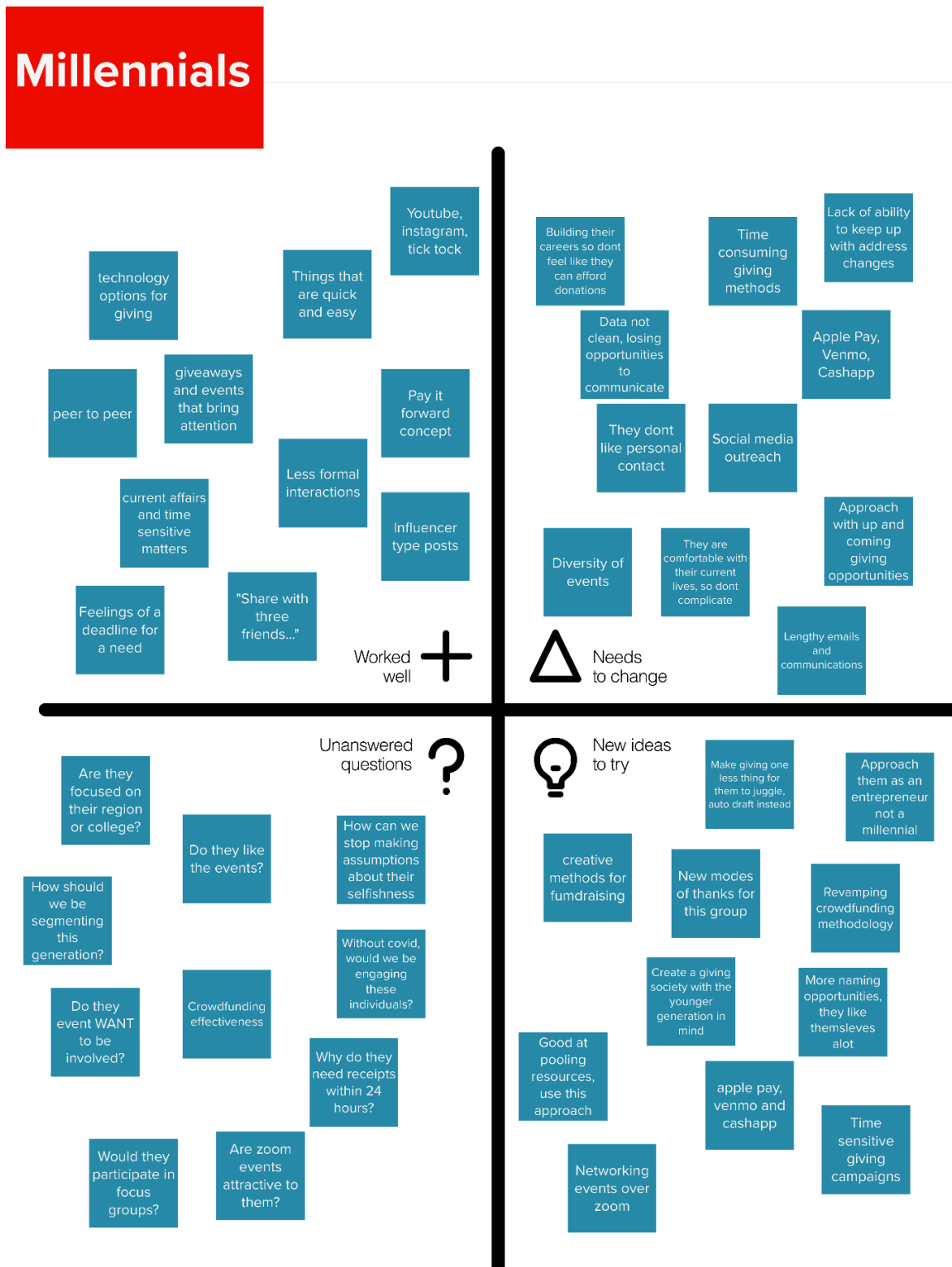




Figure 31. Feedback Grid – Millennials



After this, the researcher used statement starters to reframe the problem of philanthropic engagement. These statement starters, as well as a follow-up statement, were generated based on the input from the team as a whole. The statement starters chart created by the student investigator (see Figure 32) opened the door for participants to brainstorm ideas surrounded around the “how might we...” statements.

- ❖ How might we EDUCATE alumni on the importance of donors?
- ❖ How might we ENCOURAGE donors to contribute to something they care about?
- ❖ How might we ENRICH the lives of Highlanders for years to come?
- ❖ How might we EVALUATE regularly to ensure effective fundraising efforts?

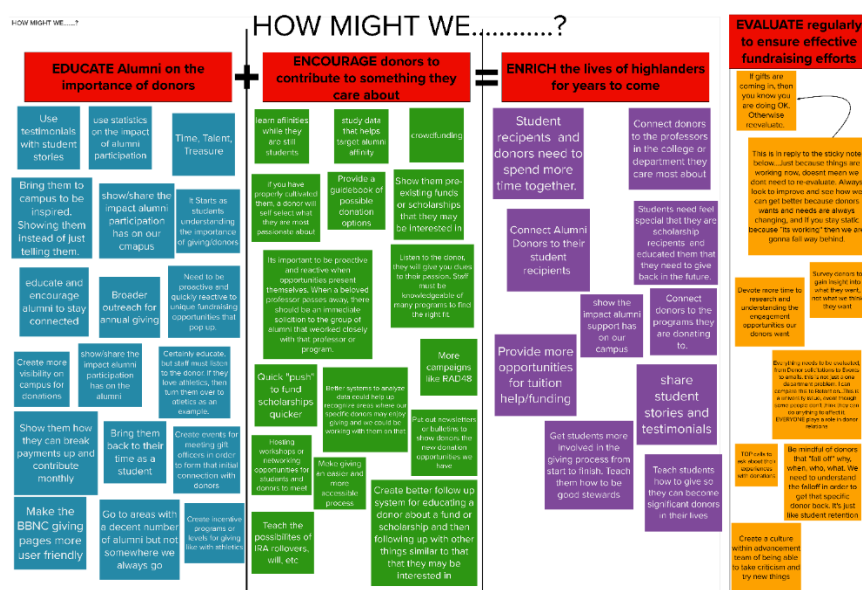
Educating alumni on the importance of being a donor provides an opening for fundraisers to cultivate a relationship with an alum. If donors do not know how important their gift could be, they will not be likely to give. Similarly, once that cultivation process starts, providing the opportunity for donors to find something they are passionate about or care about to donate to gives them meaning behind their gift. Laying the groundwork for giving and understanding how the donor is enriching the lives of Highlanders for years to come builds the relationship and creates the space for donors to feel like they are still a part of the Radford University community they love, even though they are no longer on campus in the capacity they once were. If donors are able to see the impact they are having on students’ lives, feel that their gift has gone towards something meaningful to them, and that they truly understand the

importance of being a donor, then they are likely to remain loyal and consistent in their giving.

Figures 33 and 34 show a closer look at the responses from advancement team members. Many of the responses recorded on the Mural boards came as a surprise to the student researcher. It is not often that individuals are given the opportunity to speak (or type) freely pertaining to current department activities or future changes. The findings suggest there is a clear opportunity for the department to take this feedback and expand upon it further so that the employees feel they are able to do the best at their job, create the biggest impact, and have a hand in the success of the university.

The feedback given in the statement starters chart was used to create two concept posters, one for baby boomers and one for millennials, with the details for ways in which the University Advancement Department should be soliciting, cultivating, and communicating with their alumni.

**Figure 32. Statement Starters Chart**



**Figure 33. Statement Starters (Educate & Encourage)**

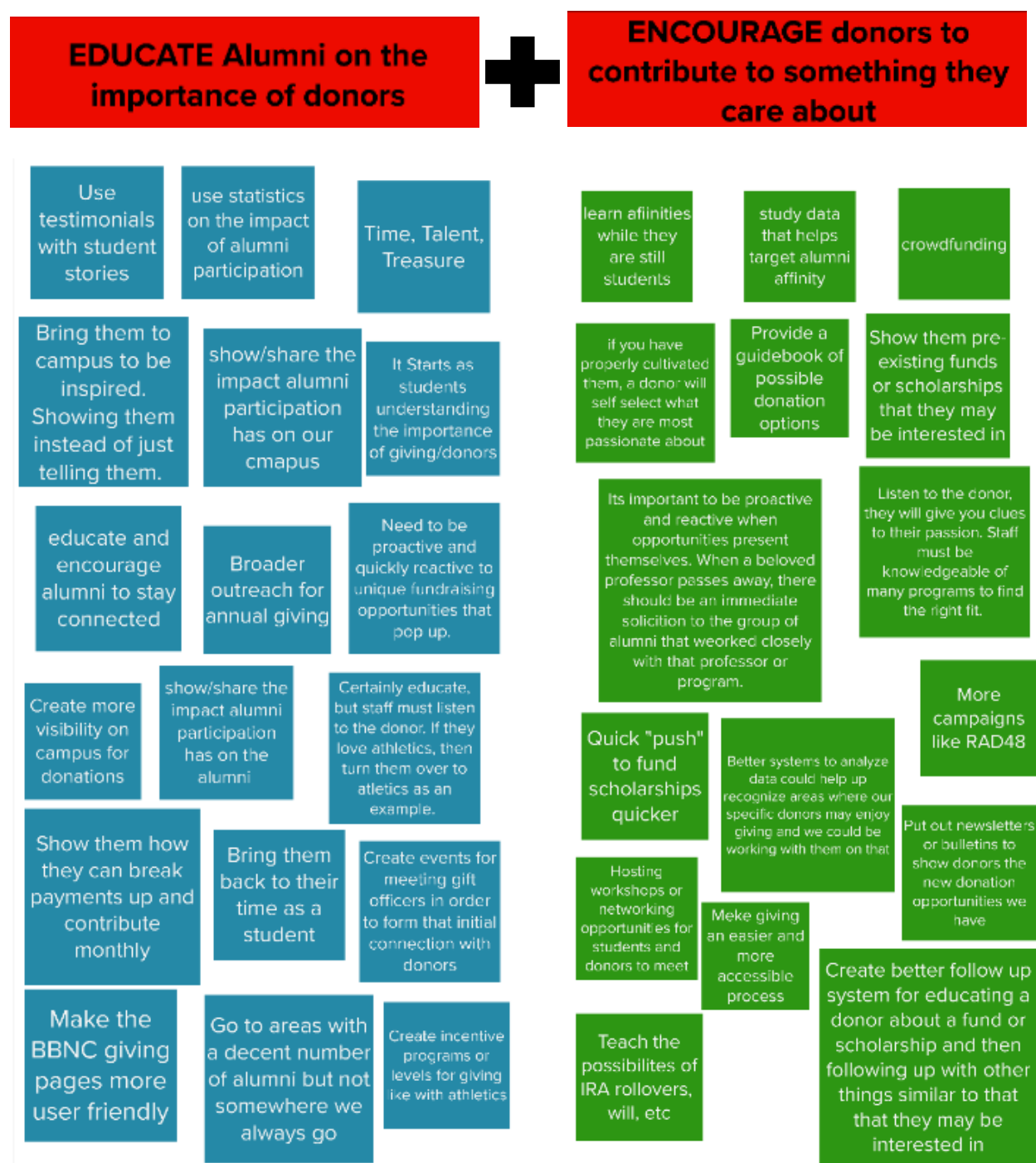
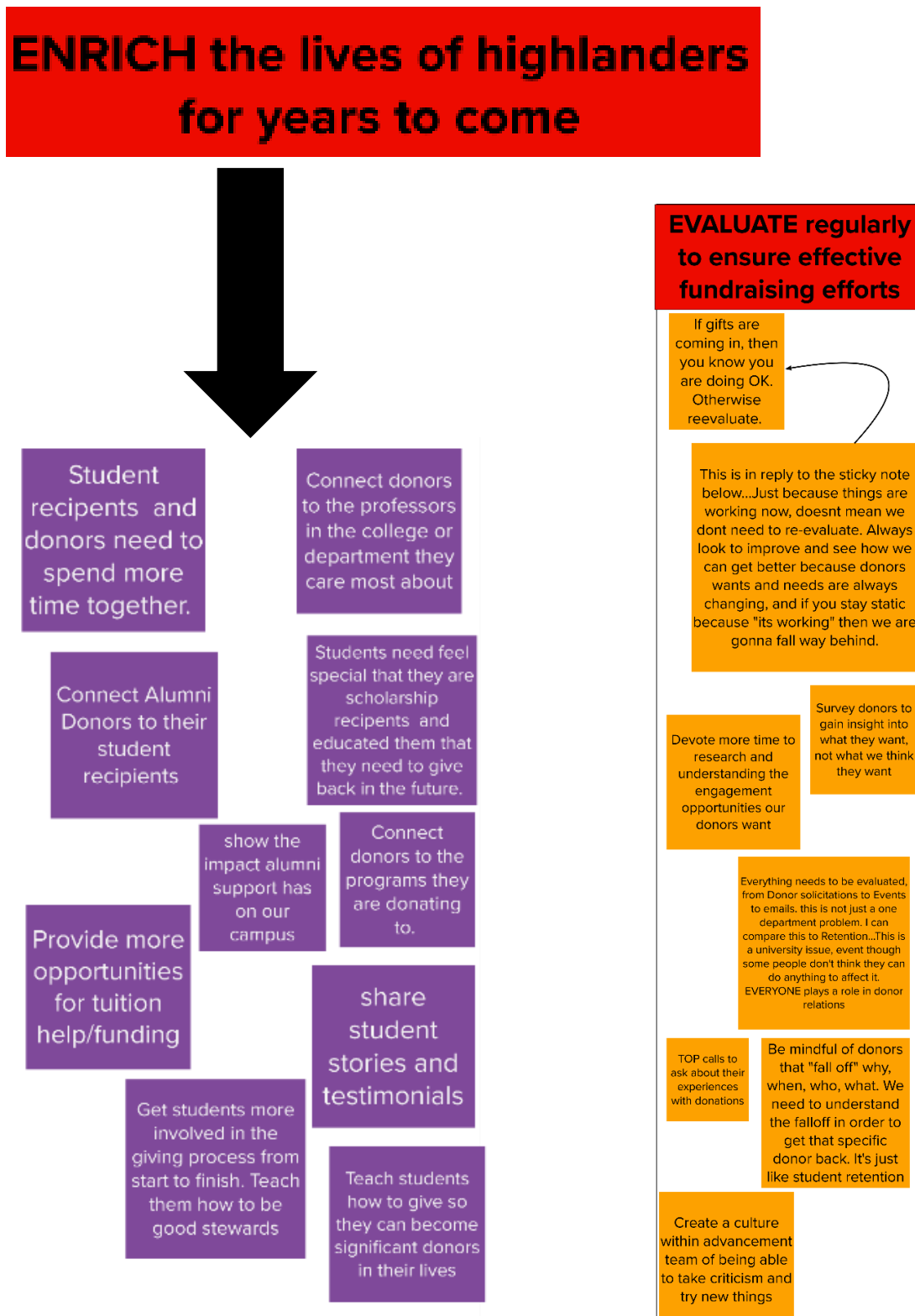


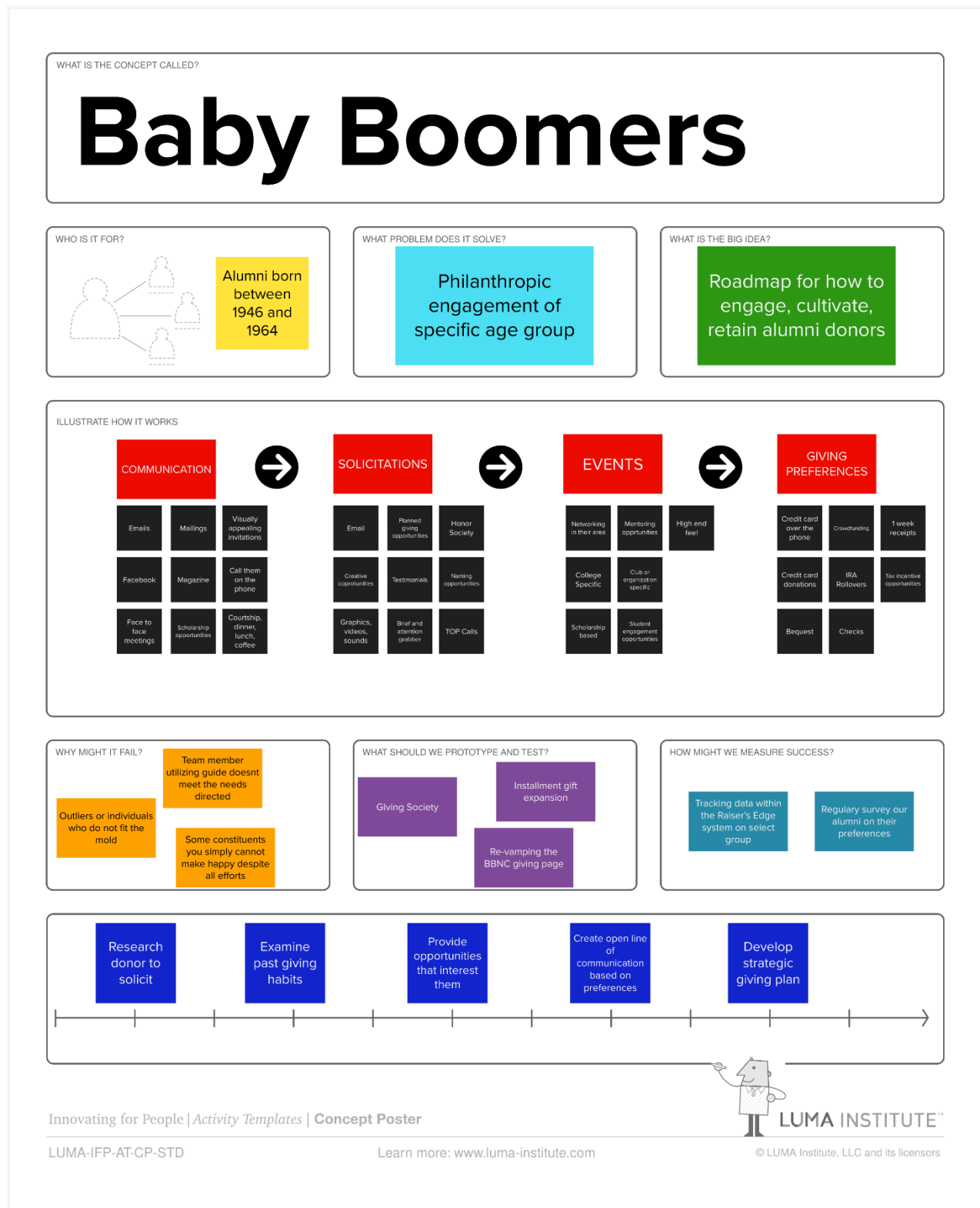
Figure 34. Statement Starters (Enrich & Evaluate)



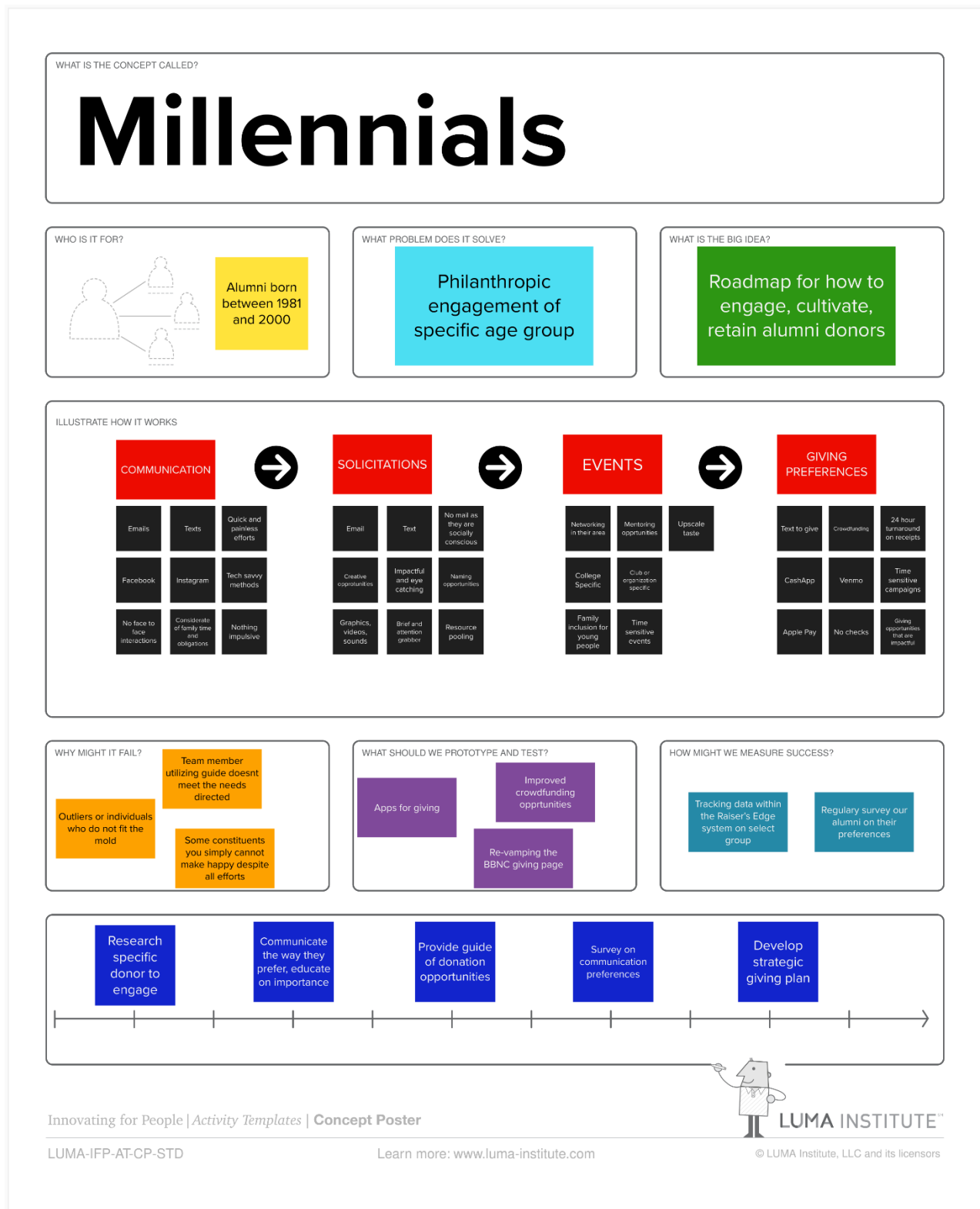
The two concept posters developed by the student researcher contain information on engaging baby boomer and millennial alumni. Each individual concept poster describes the targeted group, the problem solved, why the concept may fail, how it should be tested, and how to measure its success, as well as the illustration for the methods.

The baby boomer (see Figure 35) and millennial (see Figure 36) concept posters demonstrate the communication, solicitation, event, and giving preferences with key ideas under each heading. These concept posters can be used by advancement professionals when they are attempting to cultivate a relationship with a donor by showing them that a baby boomer may prefer to be emailed or met in person, testimonials and graphics in solicitations, to attend mentoring opportunity events, and a credit card donation over the phone, for example. Or that a millennial may want to be communicated with and solicited via text message about networking opportunities in their area and that they can give through Venmo. These guides do not serve as the end all be all for how to cultivate a relationship, but rather a framework that is meant to be altered based on the constituent.

**Figure 35. Concept Poster – Baby boomers**



**Figure 36. Concept Poster – Millennials**





## Discussion

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This study used design-thinking methods to examine philanthropic engagement among baby boomer and millennial alumni donors at Radford University. While the differences between the two groups regarding their donation and communication preferences and overall feelings about philanthropic engagement at Radford University are enlightening, many of the findings support previous research. As noted by Albritton (2020), generation differences on why and how to give did not exist. In examining the questionnaire data, our results support this statement. To illustrate, a number of individual donors in this study are focused on students. Forty-three percent (43%) are most interested in students' preferences and want their donation focused on student efforts such as providing financial aid opportunities and creating graduates who are job ready.

While other studies support the notion that millennials are three times as likely to give online versus sending a check in the mail (Baranyi, 2011), our results suggest that giving online may be infiltrating baby boomer donations as well. Over 65% of the sample in this study preferred online donations. The data from this investigation clearly illustrates that future advancement directives need to use online platforms. As suggested by Baranyi (2011), millennials prefer multi-level communications that involve social media and technology. Perhaps baby boomers are heading in this direction as well. Yet, Albritton (2020) recommended continuing all forms of traditional giving. As

recommended in the concept posters, giving by credit card, check, phone, IRA rollovers, and apps such as Venmo and Apple pay need to be explored and continued.

Interviews provided a glimpse into the thoughts, feelings, and beliefs of university advancement employees who have been in the fundraising sector for years. Interestingly enough, many of the comments made by employees reiterate the generational divide seen in the literature. Sarrantonio (2018) described millennials as those needing instant gratification, self-expression, and entitlement. One participant in this study noted the same, stating, "They grew up being able to google something and be provided with an instant result, bam, done move on...that's how they expect all things in their lives to be." Baby boomers were seen as technologically challenged. Comments such as these suggest that flexible modes of communication, solicitation, events, and giving will more than likely need to continue.

The workshop data provided interesting ideas related to solutions. Since both generations seem to be student driven, the following ideas should be considered:

1. Because millennials are noted for their focus on instant gratification, while baby boomers may enjoy more face-to-face interaction (Bhagat et al., 2010; Rovner et al., 2018), connection of students to alumni is crucial. Many respondents in this sample were student focused and interested.
2. Creating student success stories and sharing this information would be beneficial to both generations.

## Limitations

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There are certain limitations to this study that should be taken into consideration when interpreting the results. This research began and ended during a pandemic. Thus, participant responses may have been influenced by this historic event. The coronavirus pandemic has impacted the lives of everyone across the world, including all participants in the interviews, questionnaire, and workshop. This research was conducted online, which may have affected the communication styles of all participants. Additionally, the participants in the interviews and virtual workshop are all Radford University advancement team members, limiting the generalization of the results of the research. Furthermore, the ages of participants were not determined during the interviews. This is important to note as generational divide may have been an influencing factor for some of the comments made by participants. There was also a small number of participants who completed the questionnaire ( $n = 60$ ), although a response rate of 10% to 30% is deemed acceptable. Yet, the survey served as a pilot test for the department to determine alumni response and future larger scale data collection.

## Future Research

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The student researcher works in the Radford University Advancement Department and chose this research topic to complete degree requirements and to

study an area beneficial to the department and her career in the future. The Vice President for University Advancement stated from the early stages of the research that her hope was to glean information from the donors that typically is not obtained as a test to see how responsive the alumni would be. Moving forward the department will use the information gathered to create a more effective and efficient process for engaging alumni. In addition to the research gathered by the student researcher, the department will also issue a student survey on a larger scale to send out to all alumni for a broader sample, not just baby boomers and millennials. The choice to focus on these two generations was made by the student researcher, but the need to collect survey data exists across the board – including all generations.

Quite a bit has been written about the differences between the generations, and while this information may be important in considering donor characteristics (Bank of America, n.d.; Sarrantonio, 2018; Young Entrepreneurial Council, 2018), perhaps more similarities exist than originally thought. As seen in this investigation, regardless of whether alumni were baby boomers or millennials, they were interested in students and seemed to prefer giving online. Thus, continuing to examine unique and easier ways of giving using the Internet should be explored, particularly in a time of apps.

An aging donor base is prevalent (Bank of America, n.d.). Even though baby boomers will remain a significant giving force, institutions need to find ways to educate younger generations on how and why to give (Rovner et al., 2018). Incorporating app giving that provides instant gratification and ease of use may be a way to appeal to these younger university donors.

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# Appendices

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## Appendix A: Email Solicitation to Advancement Staff for Participation

Taylor J. Edwards  
Thesis Project Invitation  
February 26, 2021

NAME,

As you may know, I am working on my master's thesis and am currently in the final stages of my program. My research focuses on philanthropic engagement among Radford University (RU) alumni, and as such, I feel you can help me further investigate this topic.

I will be conducting individual interviews with multiple members of the RU advancement department and inquiring about philanthropic engagement at Radford. The interviews will be approximately 30 minutes and will be conducted via Zoom.

Additionally, I will be assembling a small group of advancement team members to participate in a workshop focused on idea generation utilizing design-thinking methods. The instructions and facilitation will be done so by me, and everyone in the workshop will work together to brainstorm. This workshop will take approximately 45 minutes to 1 hour and will be conducted via Zoom.

I am asking you to participate because I believe you would bring a unique perspective and help tremendously with my research. If you are interested in participating, please reply to this email and we will schedule the time for you to participate in either the interview and/or the workshop.

I appreciate your time and hope that you will be willing to participate in this project as I feel it will shed a great deal of light on things that we as advancement employees deal with every day.

Thank you,  
Taylor J. Edwards



## Appendix B: Vice President Email to Advancement Staff

*Team RAD,*

*As an institution of higher learning, we applaud members of our Advancement staff who choose to continue their pursuit of education. Taylor Edwards, a member of our Advancement Services team hopes to graduate with her master's degree this semester in Design Thinking. As a part of her research requirement, she will analyze alumni who were born between 1946-1964 and 1981-2000. Her study will help us understand the preferences and behaviors of these sets of alumni and contribute to our engagement efforts as a university advancement team.*

*Taylor's work will contribute to her graduation requirements while also impacting our strategic planning process.*

*You will be receiving an email from her, asking for your participation.*

*You have my approval to participate in this study, but you should not take this approval as a requirement, and I will not know who participates and who does not.*

*Please let me know if you have any issues.*

**Wendy A. Lowery**

*Vice President of Advancement and University Relations*

P.O. Box 6900 | Radford, VA 24142

Martin Hall, Suite 341

Phone: 540-831-6008

[wlowery@radford.edu](mailto:wlowery@radford.edu)

**RADFORD UNIVERSITY**

Advancement and University Relations

## Appendix C: Vice President Letter of Support



Vice President for  
University Advancement

10/01/2020

Radford University Advancement and University Relations  
P.O. Box 6900  
Radford, VA 24142  
540-831-5800

**RE:** IRB Letter of Support

**Principal Investigator:** Dr. Joan Dickinson

**Student Investigator:** Taylor J. Edwards

**Title:** Generational Differences: Millennial & Baby Boomer's Philanthropic Engagement

**IRB Approval Number:**

Dear Institutional Review Board Chair and Members:

I am writing this letter of support for one of my University Advancement team members, Taylor Edwards. It is my intention to support Taylor Edwards' research (described below).

### Research Overview

**1. Alumni Questionnaire:** Taylor will utilize the Radford University Raiser's Edge system and the help of the Director of Advancement Services to properly retrieve data pertaining to Radford alumni that are categorized as baby boomers (born between 1946-1964) and millennials (born between 1981-2000). The data will be confidential and stored properly in order to ensure anonymity of participants. The list of constituents that will be considered participants and will be sent the email containing the questionnaire link will be reviewed by myself prior to sending. The results from the questionnaire will be kept confidential and will be utilized to create persona profiles for the next portion of the research.

**2. Interview:** Taylor has permission to conduct interviews with 6 to 10 University Advancement team members and get their feedback on philanthropic engagement. She will conduct these interviews via zoom. I understand that the interviews will take approximately 30 minutes each.

**3. Design Thinking Workshop:** Taylor has permission to conduct a design-thinking workshop via zoom with 6 to 10 University Advancement team members to brainstorm and strategize ways to cultivate relationships and engage donors. I understand that the workshop will take approximately 45 minutes to one-hour to complete.

In closing, I give Taylor Edwards permission to conduct the alumni questionnaire, as well as the University Advancement interviews and workshop.

Sincerely,

A handwritten signature in blue ink that reads "Wendy A. Lowery".

Wendy A. Lowery, MPA

Vice President for Advancement and University Relations

P.O. Box 6900, Radford, VA 24142 | 540-831-5407 | fax 540-831-5805 | [www.giveto.radford.edu](http://www.giveto.radford.edu)

## Appendix D: Informed Consent – Interview



### Informed Consent – Interview

Title of Research:      Generational Differences: Millennial & Baby Boomer's Philanthropic Engagement

Researcher(s): *Taylor J. Edwards, Radford University*  
*Joan. I. Dickinson, Ph.D., Radford University*

We ask you to be in a research study designed to gain an understanding of the differences in philanthropic engagement among the two largest Radford University alumni groups, baby boomers and millennials, as well as to expand ways to cultivate relationships. If you decide to be in the study, you will be asked to participate in an individual 30-minute interview conducted on zoom with the researcher asking questions about philanthropic engagement. Approximately 6 to 10 people from the university advancement department at Radford University will be asked to participate in the interviews.

This study has no more risk than you may find in daily life. You may refuse to answer any questions, take a break, or stop your participation in this study at any time. There is no compensation from being in this study. There are no direct benefits to you for being in the study. You can choose not to be in this study. If you decide to be in this study, you may choose not to answer certain questions or not to be in certain parts of this study.

If we present or publish the results of this study, your name will not be linked in any way to what we present. The data collected in this research study will be kept confidential. Participation in research may involve some loss of privacy. We will do our best to make sure that the information about you is kept confidential, but we cannot guarantee total confidentiality. Your personal information may be viewed by individuals involved in the research and may be seen by people including those collaborating, funding, and regulating the study. We will share only the minimum necessary information in order to conduct the research. Your personal information may also be given out if required by law, such as pursuant to a court order. While the information and data resulting from this study may be presented at conferences or published in a journal, your name or other personal information will not be revealed.

We will collect your information through an interview conducted via zoom. You will not be audio or video recorded. You will not be directly quoted.

If at any time you want to stop being in this study, you may stop being in the study without penalty or loss of benefits by contacting Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson, [jidickins@radford.edu](mailto:jidickins@radford.edu)

If you have questions now about this study, ask before you sign this form.

If you have any questions later, you may talk with Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson, [jdickins@radford.edu](mailto:jdickins@radford.edu)

If this study raised some issues that you would like to discuss with a professional, you may contact Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson, [jdickins@radford.edu](mailto:jdickins@radford.edu)

This study was approved by the Radford University Committee for the Review of Human Subjects Research. If you have questions or concerns about your rights as a research subject or have complaints about this study, you should contact Dr. Benjamin D. Caldwell, Dean, College of Graduate Studies and Research, Radford University, [bcaldwell13@radford.edu](mailto:bcaldwell13@radford.edu), 540-831-5723.

It is your choice whether or not to be in this study. What you choose will not affect any current or future relationship with Radford University.

You will be given a copy of this information to keep for your records.

If all of your questions have been answered and you would like to take part in this study, then please sign below.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name(s)

\_\_\_\_\_  
Date

I/We have explained the study to the person signing above, have allowed an opportunity for questions, and have answered all of his/her questions. I/We believe that the subject understands this information.

\_\_\_\_\_  
Signature of Researcher(s)

\_\_\_\_\_  
Printed Name(s)

\_\_\_\_\_  
Date

Note: A signed copy of this form will be provided for your records.

## **Appendix E: Interview Questions**

### **Interview questions**

1. In your opinion, what are some characteristics to describe baby boomers?
2. In your opinion, what are some characteristics to describe millennials?
3. What is being done to appeal to baby boomers?
4. What is being done to appeal to Millennials?
5. What are current problems you notice with donations or engagement?
6. What does a donor experience look like currently?
7. Are there ways it could improve?
8. What marketing techniques do you find most useful with baby boomers?
9. What marketing techniques do you find most useful with millennials?
10. Do you notice different trends in communication preferences with millennials versus baby boomers?
11. Based on your experience, what is the ideal way to appeal to baby boomers to increase donations?
12. Based on your experience, what is the ideal way to appeal to millennials to increase donations?

## Appendix F: Recruitment Email for Alumni Survey

*Dear Highlander,*

*I am Taylor Edwards, a member of the Advancement Services team at Radford University, working on my master's thesis in Design Thinking. As a part of my research requirement, my final project will analyze alumni who were born between 1946-1964 and 1981-2000, focusing on philanthropic engagement among Radford University alumni. The goal of my study is to understand the preferences and behaviors of these sets of alumni and contribute to our engagement efforts as a university advancement team.*

*Wendy Lowery, Vice President of Advancement and University Relations has given her full support to my research efforts and encouraged me in the pursuit of my education. This research will contribute to my graduation requirements while also impacting the strategic planning process within the department.*

*I hope you will participate in this anonymous survey which will take approximately 7 minutes of your time.*

*Please click the link here to participate in the survey: (link here)*

# Taylor J. Edwards

**Taylor J. Edwards**

*Gift & Pledge Processor*

P.O. Box 6915 | Radford, VA 24142

Russell Hall | Office 240

Phone: 540-831-5446

[tedwards46@radford.edu](mailto:tedwards46@radford.edu)

**RADFORD UNIVERSITY**

Advancement and University Relations

## Appendix G: Informed Consent – Questionnaire



### Radford University Cover Letter for Internet Research

You are invited to participate in a research survey, entitled Generational Difference: Millennial & Baby Boomer's Philanthropic Engagement. The study is being conducted by Taylor Edwards and Dr. Joan Dickinson, Radford University.

The purpose of this study is to examine the philanthropic engagement among the two largest Radford University alumni groups, baby boomers and millennials to gain an understanding of the differences in philanthropic engagement among the two largest Radford University groups, baby boomers and millennials, as well as to expand ways to cultivate relationships. Your participation in the survey will contribute to a better understanding of philanthropic engagement. We estimate that it will take about 15 minutes of your time to complete the questionnaire. You are free to contact the investigator at the provided address and phone number to discuss the survey.

This study has no more risk than may find in daily life. You may refuse to answer any of the questions, take a break, or stop your participation in this study at any time.

The research team will work to protect your data to the extent permitted by technology. It is possible, although unlikely, that an unauthorized individual could gain access to your responses because you are responding online. This risk is similar to your everyday use of the internet.

A limited number of research team members will have access to the data during data collection. Identifying information will be stripped from the final dataset.

Your participation in this survey is voluntary. You may decline to answer any question and you have the right to withdraw from participation at any time without penalty. If you wish to withdraw from the study or have any questions, contact the investigator listed above.

If you have any questions or wish to update your email address, please contact Taylor Edwards at [tedwards46@radford.edu](mailto:tedwards46@radford.edu).

This study was approved by the Radford University Committee for the Review of Human Subjects Research. If you have questions or concerns about your rights as a research subject or have complaints about this study, you should contact Dr. Benjamin D. Caldwell, Dean, College of Graduate Studies and Research, Radford University, [bcaldwell13@radford.edu](mailto:bcaldwell13@radford.edu), 540-831-5723.

**If you agree to participate, please answer yes to the following question. If you do not wish to participate, please answer no.**

Thank you.

## Appendix H: Survey Questions

You are invited to participate in a research survey, entitled Generational Difference: Millennial & Baby Boomer's Philanthropic Engagement. The study is being conducted by Taylor Edwards and Dr. Joan Dickinson, Radford University.

The purpose of this study is to examine the philanthropic engagement among baby boomers and millennials, the two largest alumni groups at Radford University. Investigating these two constituency groups will help to gain an understanding of the differences in their philanthropic engagement as well as to expand ways to cultivate relationships. Your participation in the survey will contribute to a better understanding of philanthropic engagement. We estimate that it will take about 7 minutes of your time to complete the questionnaire. You are free to contact the investigator at the provided address and phone number to discuss the survey.

This study has no more risk than you may find in daily life. You may refuse to answer any of the questions, take a break, or stop your participation in this study at any time.

The research team will work to protect your data to the extent permitted by technology. It is possible, although unlikely, that an unauthorized individual could gain access to your responses because you are responding online. This risk is similar to your everyday use of the internet.

A limited number of research team members will have access to the data during data collection. Identifying information will be stripped from the final dataset.

Your participation in this survey is voluntary. You may decline to answer any question and you have the right to withdraw from participation at any time without penalty. If you wish to withdraw from the study or have any questions, contact the investigator listed above.

If you have any questions or wish to update your email address, please contact Taylor Edwards at tedwards46@radford.edu.

This study was approved by the Radford University Committee for the Review of Human Subjects Research. If you have questions or concerns about your rights as a research subject or have complaints about this study, you should contact Dr. Benjamin D. Caldwell, Dean, College of Graduate Studies and Research, Radford University, bcaldwell13@radford.edu, 540-831-5723.

If you agree to participate, please answer yes to the following question. If you do not wish to participate, please answer no.

Yes

No



How satisfied are you overall with the experience you had as a student at Radford?

Extremely satisfied

Somewhat satisfied

Neither satisfied nor dissatisfied

Somewhat dissatisfied

Extremely dissatisfied

How would you describe your overall feelings about Radford University today?

Extremely positive

Somewhat positive

Neither positive nor negative

Somewhat negative

Extremely negative

With which do you identify most closely?

a. Radford University as a whole

b. A particular department or program at Radford University

c. A particular college at Radford University

d. None of the above

If you were asked, how likely would you be to recommend Radford University to a prospective [undergraduate/graduate student] of your own interests and background?

Not at all likely

Extremely likely

0

1

2

3

4

5

6

7

8

9

10

In general, whose perspective on the University's needs and challenges is of most interest to you?

a. Current students

b. The faculty

c. The President of the University

d. Alumni

e. The Dean of a particular college

f. None of the above

What degree(s) did you receive from Radford University?

Undergraduate

Graduate

Ph.D

Certificate

How do you feel after making a gift to Radford University?

Extremely satisfied

Moderately satisfied

Slightly satisfied

Neither satisfied nor dissatisfied

Moderately dissatisfied

Extremely dissatisfied

Not applicable

How would you rate your involvement with Radford University today?

Not involved

Rarely involved

Occasionally involved

Regularly involved

Prefer not to answer

Where do you get news and information about Radford University? [CHECK ALL THAT APPLY]

a. Email or email newsletters from Radford University	e. Newsletters or other printed material from Radford University
b. Traditional media (e.g., print or online newspapers, magazines, TV, etc.)	f. Fundraising mail, email, or phone calls
c. Friends, relatives, students, or alumni (in any way other than social media)	g. Social media such as blogs, Facebook, Twitter, YouTube, Instagram
d. Radford University websites	h. I do not get news and information about Radford University

How interested are you in the following ways to stay involved with RU?

	Very	Somewhat	Not Interested
a. Staying informed about campus news and what's happening at Radford University	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Online access to University resources (e.g., library databases, historical documents, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Socializing or networking with Radford University alumni	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Attending faculty talks or other events with an educational, intellectual, or cultural focus	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Attending events organized around Radford University sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Job and career services for alumni	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Mentoring current Radford University students or recent grads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Helping attract and recruit prospective students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When was the last time you were asked (by mail, email, phone, or in person) to make a financial donation to Radford University?

a. Within the past month

b. Within the past few months

c. Within the past year

d. More than a year ago

e. Never been asked

f. Not sure/Don't recall

How good of a job do you feel Radford University is doing at communicating to you....

	Extremely good	Somewhat good	Neither good nor bad	Somewhat bad	Extremely bad
a. Its fundraising priorities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The impact gifts have on Radford University	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Who the beneficiaries of gifts to Radford University are	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Where gifts go and how they are used	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If it were up to you to decide where money went, which three of these objectives would you allocate the most money to? (please select three)

a. Attracting and retaining the best faculty who can lead innovation and discovery

b. Building on Radford University's strengths in its leading research and academic programs

c. Assisting students to be day-one job ready when they graduate

d. Helping offset the impact of state budget cuts

e. Creating opportunities for students with financial need

f. Supporting Radford University's athletics programs and student athletes

g. Helping Radford University make an impact on issues of importance to Virginia

h. Helping Radford University make an impact on issues of global importance

i. Expanding study-abroad and other international opportunities for students

j. Building Radford University's endowment



What is your preferred method of making a donation?

Check in the mail

Credit card donation I make online

Credit card donation I make over the phone

In person

How much does each of the following considerations weigh in your decision when asked to make a gift to Radford University?

	A great deal	A moderate amount	None at all
1. I don't know where my contributions go or how they are used	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Giving to Radford University takes money away from my loved ones	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. My money has greater impact on other organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Money given to Radford University is wasted on non-essential programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I feel my obligation to Radford University was fulfilled by paying tuition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. I'm not sure how making a gift benefits me now	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Radford University just doesn't need my money as much as other organizations do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Radford University can always count on its wealthier alumni and friends to provide adequate support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. I don't support Radford University because I object to certain policies or decisions it has made	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Apart from Radford University, do you give money on a regular basis to any charities or other not-forprofit organizations?

Yes

No

Prefer not to say

What is your age?

a. Under 30

b. 30-39

c. 40-49

d. 50-59

e. 60-69

f. 70 and older

g. Do not wish to answer

How likely are you to attend a Radford University event?

Extremely likely

Somewhat likely

Neither likely nor unlikely

Somewhat unlikely

Extremely unlikely

After attending a Radford University event, how likely are you to make a donation?

Extremely likely

Somewhat likely

Neither likely nor unlikely

Somewhat unlikely

Extremely unlikely

Do you have any comments or suggestions about how Radford University could be more relevant to your life today?

## Appendix I: Informed Consent – Critique Sheets



### Informed Consent – Critique Sheets

Title of Research: Generational Differences: Millennial & Baby Boomer's Philanthropic Engagement

Researcher(s): *Taylor J. Edwards, Radford University*  
*Joan. I. Dickinson, Ph.D., Radford University*

We ask you to be in a research study designed to gain an understanding of the differences in philanthropic engagement among the two largest Radford University alumni groups, baby boomers and millennials, as well as to expand ways to cultivate relationships. If you decide to be in the study, you will be asked to complete a critique sheet of persona profiles created by the student investigator. This will take approximately 5 minutes of your time.

This study has no more risk than you may find in daily life. You may refuse to answer any questions, take a break, or stop your participation in this study at any time. There is no compensation from being in this study. There are no direct benefits to you for being in the study. You can choose not to be in this study.

If we present or publish the results of this study, your name will not be linked in any way to what we present. Participation in research may involve some loss of privacy. We will do our best to make sure that the information about you is kept confidential, but we cannot guarantee total confidentiality. Your personal information may be viewed by individuals involved in the research and may be seen by people including those collaborating, funding, and regulating the study. We will share only the minimum necessary information in order to conduct the research. Your personal information may also be given out if required by law, such as pursuant to a court order. While the information and data resulting from this study may be presented at conferences or published in a journal, your name or other personal information will not be revealed.

If you have any questions later, you may talk with Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson [jdickins@radford.edu](mailto:jdickins@radford.edu)

If this study raised some issues that you would like to discuss with a professional, you may contact Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson [jdickins@radford.edu](mailto:jdickins@radford.edu)

This study was approved by the Radford University Committee for the Review of Human Subjects Research. If you have questions or concerns about your rights as a research subject or have complaints about this study, you should contact Dr. Benjamin D. Caldwell, Dean, College of Graduate Studies and Research, Radford University, [bcaldwell13@radford.edu](mailto:bcaldwell13@radford.edu), 540-831-5723.

It is your choice whether or not to be in this study. What you choose will not affect any current or future relationship with Radford University.

Thank you.

# Appendix J: Critique Sheets

## Persona Profile Critique

Persona Name: **NICK**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

Persona Name: **DENISE**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

Persona Name: **JOSH**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

Persona Name: **LISA**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

Persona Name: **KAYLA**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

Persona Name: **ROBERT**

**Persona Accuracy**

Circle the number corresponding to the accuracy of the persona profile. (0 – not accurate at all, 5 – extremely accurate)

**Description Accuracy**

0 1 2 3 4 5

**Motivations Accuracy**

0 1 2 3 4 5

**Goals Accuracy**

0 1 2 3 4 5

**Preferences Accuracy**

0 1 2 3 4 5

Final Thoughts: Things to change

\_\_\_\_\_

**Overall accuracy of persona**

0 1 2 3 4 5

## Appendix K: Informed Consent – Workshop



### Informed Consent - Workshop

Title of Research:      Generational Differences: Millennial & Baby Boomer's Philanthropic Engagement

Researcher(s): *Taylor J. Edwards, Radford University*  
*Joan. I. Dickinson, Ph.D., Radford University*

We ask you to be in a research study designed to gain an understanding of the differences in philanthropic engagement among the two largest Radford University alumni groups, baby boomers and millennials, as well as to expand ways to cultivate relationships. If you decide to be in the study, you will be asked to participate in a workshop with other university advancement employees via zoom. The workshop will take approximately 45 minutes to 1 hour. The workshop will focus on idea generation and brainstorming about philanthropic engagement. Approximately 6 to 10 people from the university advancement department at Radford University will be asked to participate in the study.

This study has no more risk than you may find in daily life. You may refuse to answer any questions, take a break, or stop your participation in this study at any time. There is no compensation from being in this study. There are no direct benefits to you for being in the study. You can choose not to be in this study. If you decide to be in this study, you may choose not to answer certain questions or not to be in certain parts of this study.

If we present or publish the results of this study, your name will not be linked in any way to what we present. The data collected in this research study will be kept confidential. Participation in research may involve some loss of privacy. We will do our best to make sure that the information about you is kept confidential, but we cannot guarantee total confidentiality. Please note that participation in the workshop will be heard by other individuals in the workshop and thus will not be confidential. Your personal information may be viewed by individuals involved in the research and may be seen by people including those collaborating, funding, and regulating the study. We will share only the minimum necessary information in order to conduct the research. Your personal information may also be given out if required by law, such as pursuant to a court order. While the information and data resulting from this study may be presented at conferences or published in a journal, your name or other personal information will not be revealed.

We will collect your information through an interview conducted via zoom. You will not be audio or video recorded. You will not be directly quoted.

If at any time you want to stop being in this study, you may stop being in the study without penalty or loss of benefits by contacting Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson [jdickins@radford.edu](mailto:jdickins@radford.edu)

If you have questions now about this study, ask before you sign this form.

If you have any questions later, you may talk with Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson [jdickins@radford.edu](mailto:jdickins@radford.edu)

If this study raised some issues that you would like to discuss with a professional, you may contact Taylor Edwards [tedwards46@radford.edu](mailto:tedwards46@radford.edu) or Dr. Joan Dickinson [jdickins@radford.edu](mailto:jdickins@radford.edu)

This study was approved by the Radford University Committee for the Review of Human Subjects Research. If you have questions or concerns about your rights as a research subject or have complaints about this study, you should contact Dr. Benjamin D. Caldwell, Dean, College of Graduate Studies and Research, Radford University, [bcaldwell13@radford.edu](mailto:bcaldwell13@radford.edu), 540-831-5723.

It is your choice whether or not to be in this study. What you choose will not affect any current or future relationship with Radford University.

You will be given a copy of this information to keep for your records.

If all of your questions have been answered and you would like to take part in this study, then please sign below.

_____ Signature	_____ Printed Name(s)	_____ Date
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I/We have explained the study to the person signing above, have allowed an opportunity for questions, and have answered all of his/her questions. I/We believe that the subject understands this information.

_____ Signature of Researcher(s)	_____ Printed Name(s)	_____ Date
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Note: A signed copy of this form will be provided for your records.





Appendix M: Luma Institute Concept Poster Template

WHAT IS THE CONCEPT CALLED?

WHO IS IT FOR?



WHAT PROBLEM DOES IT SOLVE?

WHAT IS THE BIG IDEA?

ILLUSTRATE HOW IT WORKS

WHY MIGHT IT FAIL?

WHAT SHOULD WE PROTOTYPE AND TEST?

HOW MIGHT WE MEASURE SUCCESS?

HOW WILL WE MAKE THIS HAPPEN?





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# Generational Differences

## Millennial & Baby Boomer's Philanthropic Engagement

Taylor J. Edwards, Dr. Joan Dickinson, Kathleen Sullivan, & Bruce Parsons

RADFORD UNIVERSITY

Philanthropic engagement is a crucial part of the functioning and success of colleges and universities nationwide. Much research has been done to evaluate the generations and how they each operate, but little has been done to investigate baby boomers compared to millennials. These are the two largest groups at Radford University and serve as a major component of the giving process and the successful operation altogether.

Evolving and taking the time to understand the communication and donation preferences of these two groups will continue to be something high on the priority list within the Radford University Advancement Department. Millennials want to text; baby boomers prefer to sit down and meet with people in person. So how should we truly be cultivating relationships with these groups?

- Is it cut and dry?
- Are there preferred methods?

- Do they feel valued?
- Why don't they donate?

All of these things were investigated in this study.

This study was divided into three parts and used a convenience sample for the interviews and virtual workshop, and a purposive, but random, sample for the alumni donor survey. Participants for the interviews and virtual workshop included Radford University Advancement professionals within the advancement services, alumni relations, communications, major gift, and annual giving teams to gather information about current and future philanthropic engagement of baby boomers and millennials.



Interview participants across the board shared that they feel millennials would like having a text-to-give option and that they don't have the time or the means to give at this time in their lives.

**“** *They [millennials] are just figuring their lives out, getting acclimated in a career or establishing a family, they aren't focused on making things better for generations to come, they are just focused on making sure their lives are good right now.”*

While baby boomers are established in their lives and are reaching retirement age or already have, they have already figured out their means and boundaries.

**“** *They [baby boomers] have more discretionary income and are coming into or are at retirement age.”*

Finding a way to prepare a roadmap for the best ways to work with these two groups of individuals becomes increasingly more important over time to the fundraisers attempting to obtain scholarship funds and excess funding for emergency programs.

Results from the design thinking strategies provided a concept poster for both generation groups to serve as a “how to” for engaging, cultivating, communicating, and securing gifts.