Thank you for supporting this morning's program on Generational Strategies!



Success:

Generational Planned Giving Strategies

With Chuck Underwood

1

2

Generation

Generational Study Emerges: The Decade Of The 2000s

Generational Training, Knowledge, Strategies

3

4

The New Mis-Information Century: Generations That Aren't

 $G_{e_n Y}$

Sandwich Generation Echo Boomers

App Gen

i-Gen

GEN NEXT Business.

Government.

Education.

Religion.

Politics.

5

The Permanent Principles

4 Truths

- 1. Formative years mold core values.
- 2. Five living generations.
- 3. Core values guide our decisions.
- 4. Classroom years are PRE-generation

The Holy Grail

Generational Gearbox

Generational Workforce Strategies

Recruit Communicate **Onboard** Lead Train Inspire Manage Retain

MD Anderson Hospital

18-month onboarding program

9

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Workforce Strategies		
Recruit	Communicate	
Onboard	d Lead	
Train	Inspire	

Generational

Manage Retain

America's Living Generations			
NAME	AME BIRTH YEARS AGE, 2		
G . I.	1901 - 1926	97 +	
Silent	1927 - 1945	78 to 96	
Boomer	1946 - 1964	59 to 77	
Gen X	1965 - 1981	42 to 58	
Millennials	1982 – 2000	23 to 41	
Gen Z	2001 – 2005	18 to 22	

Generations tend to be nation-specific

"The Changing Face Of America"

Immigrants: how many formative years did you spend in the U.S.?

14

Everyone is an individual.

Don't unfairly stereotype.

A lighthouse to guide us.

15 16

Denver Foundation:Philanthropic Criteria And Values

	SIL	воом	Х	MIL
Volunteerism	yes	yes	weak	yes
Religion	trad'l	seek	seek	seek
Parent message	yes	yes	weak	yes
Make difference	yes	yes	weak	yes

Denver Foundation:Philanthropic Criteria And Values

	SIL	BOOM	X	MIL
Long-term cause	yes	yes	no	no
Trust organiz'n	prove	prove	prove	prove
Tax advantage	yes	yes	yes	later
Sense of cmnty	ves	ves	weak	ves

17 18

Silents	Silents
Birth Years: 1927 – 1945 Age in 2023: 78 to 96 How Many Born: 46,582,000 Formative Years: '30s to early '60s	"Surprise! The graying of the workforce is better news than you think"
Silents	Depression Bread Line Silents
Onents	D – Day: WWII
Most-Involved Grandparents	Formative Years: 1930s – early '60s
21	22
Formative Years: 1930s-early '60s Silents	Silents
Air Raid Drill The Happy Days	Soviet Military and Cold-War Threat

Silents "Never had American youth been..." 25

Silents A Time Of Extreme Conformity

Silents

26

28

Women, minorities: White men: smooth sailing not so smooth

Silents

"The book that defined a generation"

Silents

The PBS **Television Special**

"The Silents"

Silents' War G. I.s' War WW II - Victory Korea - Stalemate

"Somehow, we had lost OUR war"

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5

Silents

"A vague dissatisfaction..."

Silents

Jean Kirkpatrick: Former UN Ambassador

"We are the generation of women born too soon"

31

33

32

34

36

Silents

"It's so nice to have a man around the house, A knight in shining armor..." **Silents**

The Sexual Revolution Of The 1960s

Silents

Silents influence the before-and-after of the Women's Movement

Gloria Steinem **Silents**

Silents influence the before-and-after of the modern Civil Rights Movement

35

	Silents
Sony	"Generation Rich"
	Wealthiest retirees to date
	Free spenders
	Pent-up desire to live
	,
Silents	Generational Marketplace Persuasion
	-
	I. Identify target generation.
	2. Identify their current life stage(s).
	3. Select one or more Core Values.
Grandkids. Think Young.	
Travel. And More.	4. Message to core values & life stage.
Silents	
Wendy's	
stretches its	Disney
target demo to	

Celebrate the Silents!	5	Wendy' s	
44	4		43
] [
Energize	,	Fidelity	
46	4		45

Birth Years: 1927 - 1945

Age in 2023: 78 to 96

47

How Many Born: 46,582,000

Silents come of age during the glory days of American cars Formative Years: '30s to early '60s

Silents

BUILDING A RELATIONSHIP

- > They grew up less rushed than you.
- > There was more courtesy.
- > Conversation: more leisurely pace.
- > Let them talk. You listen.
- If they're talking, you're winning.

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BUILDING A RELATIONSHIP

- Use this seminar as conversation start
- > Discuss their "generation": it's safe
- > Take them back to their formative yrs.
- > They want a warm chat before "biz"

50

BUILDING A RELATIONSHIP

- > Empathy: they want to be understood
- > So, read books about their generation.
- Demonstrate that you understand their unique life passage.

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BUILDING A RELATIONSHIP

- > They are wary of solicitations
- > Targets of many unsolicited hustles
- They've been form-lettered to death
- > Do whatever it takes to earn their trust

52

BUILDING A RELATIONSHIP

Be sensitive to their age:

- ➤ Hearing loss: read body language.
- > Enunciate and project! Don't yell!
- > Eliminate all extraneous noise.
- > X'ers and Mils: talking too fast?
- > Slow down, especially on phone.

BUILDING A RELATIONSHIP

- Don't call Silent couples "you guys"
- ➤ Silent women are NOT guys!
- Phone: does a human answer your phone?
- Use land-line phones, not mobiles!

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Your Marketing Collaterals

- Use English language properly
- > Make print pieces reader-friendly
- > Put the important stuff first
- Get to the point, but tell whole story

Your Marketing Collaterals

- > Type size and color contrast
- > Attractive graphics, but not overdone
- Create Silent-specific mailers
- Create Silent page(s) on your website

55 56

Understanding Silents

- Donor surveys: can you capture their age or generation?
- > Any Silents on your staff?
- Silent advisory committee?
- Bring me in for a Q/A or to train your entire team.

Silents at 70

57

Boomers

Never give up. Never too old. Dream. Team.

Boomers

U.S. drops 2 atomic bombs on Japan. WWII ends a month later: Sept. 2, 1945.

60

58

WE WIN!

Boomers

Boomers

THE \$3 BILLION WEDDING BUSINESS !!!

61

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Boomers

Birth Years: 1946 - 1964 Age In 2023: 59 to 77 How Many Born: 79,907,844 Formative Years: '50s-early '80s

64

63

"It is, I believe, the greatest generation society has ever produced."

Tom Brokaw

Boomers

Boomers

Jonas Salk: USA: first polio vaccine on the moon

G.I. Leadership Era: Bold, Ethical

America is getting so much RIGHT!

65 66

Boomers

G.I. Core Value: "We're all in this TOGETHER."

67

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Americans finally confront their own worst prejudices

68

America:

The World's Noble North Star

America: as magical as magical gets....

70

Boomers

Kent State - 1970 Boomers

Optimism Right-Wrong
Idealism Patriotism
Empowerment Make USA Perfect
Engagement The Power To Do It

The Consciousness Movement: 1961 - 1975

71 73

Kent State - 1970	Boomers

The Consciousness Movement: 1961 - 1975

3

"Tin soldiers and Nixon's comin'...

We're finally on our own.

This summer I hear the drummin'...

Four dead in Ohio."

Crosby, Stills, Nash, & Young

The Consciousness Movement

CIVIL RIGHTS Movement
WOMEN'S Movement
WAR PROTEST Movement
ECOLOGY Movement
SEXUAL Revolution
DRUG Revolution
RELIGION Revolution
YOUTH EMPOWERMENT

2^{nd-Wave} Boomers

Boomers

Some don't feel like Boomers

Miss the social protests

Some values different, most similar

75

2nd-Wave Boomers

76

The Seventies: "sex, drugs, and rock 'n roll"

Boomers

Forever Young!

Boomers

- √ Exuberant
- ✓ Outgoing
- √ Assertive
- ✓ Aggressive
- ✓ Comfy in spotlight✓ Forever Young!

Boomers Walt Disney World

79

81

80

Boomers

Vietnam: America is at war with war

82

Boomers

Fort Worth

00-RAH!

Boomers In Adulthood

> The Career Generation

Anheuser

Busch

- > Skyrocketing Divorce Rate
- > Permissive Parenting
- > Brilliant In The Workplace
- > Continue The Quest...

83

Retire? WHY?!

"Scientists are on the brink of radically expanding the span of a healthy life."

85

86

Boomers

Ameriprise

AS DONORS, VOLUNTEERS Boomers

- Possess all basic giving core values
- "We want to save the world"
- Control 50%+ of U.S. wealth
- Don't know how long they'll live
- How much \$ do they need to retire?
- Bailing out adult kids, grandkids

88

AS DONORS, VOLUNTEERS Boomers

- Wellness-oriented
- Personal touch, courtesy important
- Emotional appeals work
- Boomer Advisory Committee?
- (Giving USA): faith-based+education

AS DONORS, VOLUNTEERS Boomers

- Assertive about use of their funds
- Demanding, selective, creative
- Want to make smartest decision
- Anticipate/answer questions fully
- Can you help them create new ideas?

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AS DONORS, VOLUNTEERS Boomers

- Have increased online giving
- Have increased giving via website, smartphone, tablet
- Giving via text messaging is growing
- Direct mail is persuasive

91

Prefer to give occasionally, not monthly

AS DONORS, VOLUNTEERS Boomers

- Want efficiency, skill, courtesy, thoroughness
- Demonstrate your knowledge of their generation
- Remind them: they care for less fortunate
- Younger consultants: talk slower
- Use language properly

92

THE NEW WORKPLACE REALITY

- There is no "normal retirement age"
- Will work past traditional retirement
- Love to work: "The Perennials"
- Want to remain productive, vital

THE NEW WORKPLACE REALITY

- They'll stay put or launch Career Next
- Fulltime, parttime, project, consulting
- Younger bosses: confront your ageism

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THE NEW WORKPLACE REALITY

- Want to help company and younger workers
- Not enough Xers to replace Boomers
- So: recruit and retain Boomers

THE NEW WORKPLACE REALITY

- Excellent work ethic; go the extra mile
- Care about organization, coworkers
- Ethics are important
- Assertive, aggressive; expect same from you
- Will play by rules, but will challenge them

95 96

THE NEW WORKPLACE REALITY

- Usually willing to try new things (AARP)
- As mentally quick as younger gens (Sloan Mgt.)
- Waste less time on the job (Salary.com)
- Motivation is increasing w/age (Towers Watson)

THE NEW WORKPLACE REALITY

- Create a pro-Boomer culture
- Respect their track record
- Respect their knowledge, values, work ethic
- Don't shut them out

97 98

The Boomer Leadership Era: 2010s through 2020s

"The country is starved for integrity."

Boomer Colleen Rowley THE BOOMER LEADERSHIP ERA: 2010s and 2020s

99 100

The leadership culture Boomers inherited from Silents What Boomer leaders have done thus far

Birth Years: 1946 - 1964 Age In 2023: 59 to 77 How Many Born: 79,907,844 Formative Years: '50s-early '80s

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GenX: 58,541,842 Armies Of One

Birth Years: 1965 - 1981Age In 2023: 42 to 58 How Many Born: 58,541,842

Formative Years: 1970s to early 2000s

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GenX Leaders Will Have To Handle The Worker Shortage

- 1. Retain Boomers.
- 2. Recruit All generations... and immigrants... better.
- 3. Help Higher Education to prepare students for your industry by using **Generational Education Strategies.**

105

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The GenX Formative Years: extreme highs, extreme lows

GenX

"A New Breed of Whiz Kids"

GenX

Women, minorities advance. Household income rises.

108

GenX

All About Survival

- 1. Divorced parents
- 2. Time-poor parents
- 3. Permissiveness
- 4. Mobile Society
- 5. Poor Leadership
- 6. Middle Class ravaged

109 110

GenX

Divorce Rate Skyrockets

GenX

112

"Adult Children of Divorce and the Healing of Our Pain"

111

GenX

Career Moms Join Career Dads

And So: Latchkey Kids

GenX

The
Momentous Loss
Of
The Nightly Family
Sit-Down Dinner
At Home

GenX

Guilt-ridden, permissive parenting

GenX

GenX

Our more mobile society and the uprooting of many X'er kids

Leaders, Heroes Fall In Disgrace

GenX

GenX

Whom, and what, can we trust?

Nobody. Nothing.

America begins to unravel

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118

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CORE VALUES

- > Independent and self-reliant
- > Cynical and distrustful
- > Weaker sense of nation, patriotism
- > Self-focus: what's in it for ME?
- > Survival of the fittest
- Not a "joiner" generation

GenX

Membership and Volunteerism Crisis: They don't "participate"

GenX

GenX "This is so us!" 121

More Isolation. Less Sharing. And So: Stronger Self-Focus.

- Low birth rate: fewer brothers and sisters
- More household income: bigger houses
- Unshared bedrooms
- Multiple: bathrooms, phones, TV's
- > The loss of the nightly family dinner
- The early video games are solitary, not group
- Latchkey: "home alone"

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GenX

1970s video arcade

Females: surging. Males: searching. 🕽 "I am woman, hear me roar" 🕽

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GenX "You taught us How kick butt."

TV spot - Secret Deodorant

125 126

21

GenX

3/15/2023

GenX TV spot - Hummer 127 128

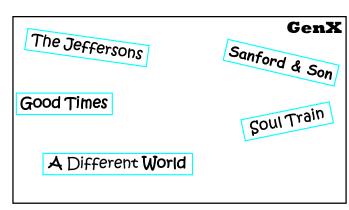
GenX TV spot - Chevy Monte Carlo

GenX Print Ad - Miller Beer

GenX African-American X'ers o Post-Civil Rights o Better jobs Better income Suburbs Legislation

129 130

GenX **Busing: Not Easy** But it intermingles X'ers



131 132

"I have a dream!"	GenX
1986:	We finally got
Congress creates a national MLK holiday	We finally got a piece of the pie
33	134
GenX	GenX
The guys	
Aust to	
figure it out	
- 2	
	The hard-earned celebration of
	women and minorities
135	136
GenX	GenX
	Generational core values influence employer perks
The Family-First Generation 137	138
±0,	200

It's An Experimental Era With Perks

AS DONORS, VOLUNTEERS

GenX

- Must earn their trust
- Self-focus: what's in it for me?
- Appeal to their pragmatism, sensibility
- o They'll do their homework

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AS DONORS, VOLUNTEERS

GenX

- Might not like chit-chat, small talk
- o Remember Family-First core value
- o They like choices
- o All generations like matching grants
- GIVING USA: strong in Faith-based and U.S. Health/Medical

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AS DONORS, VOLUNTEERS

GenX

- Many are still time-poor
- But oldest are empty-nesting
- Your collaterals: brief and visual
- Your skill and knowledge are vital
- Use technology fully

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COMMUNICATING WITH THEM GenX

- Husbands, wives are equal partners
- Speak to both, equal eye contact
- Let them see you "get" their passage
- o Give them big picture, let them talk
- Ask how they plan to empty-nest

X'ers As Your Employees

- o Creative, entrepreneurial
- Self-reliant, independent
- Don't need a lot of guidance
- o "Give me a target & leave me alone"
- Adaptive, handle change well
- Excellent at finding solutions

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X'ers As Your Employees

- Results-oriented
- Efficient
- Linear mind-set: can be good or bad
- o Can you earn their loyalty?

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X'ers As Your Employees

- Work-life balance has always been important
- High-risk, high-reward jobs in earlier career years
- o But now: stability, security look good

146

X'ers As Your Employees

- Seek bosses who let them selfmanage
- Seek bosses who delegate authority
- Have never seen long-term security
- So, they like constant training in hard and soft skills

147

X'ers As Your Employees

- Prefer advancement based on merit
- Women seek mentoring, equal pay
- Women: demonstrate MeToo sensitivity
- They seek creative opportunities

148

X'ers As Your Employees

- Help them with the Human Factor
- Compassion, interpersonal skills
- o Patience, especially with Millennials
- Strengthen their outward focus
- Strengthen team/group performance
- Beware "efficiency to an extreme"

X'ers As Your Employees

- Assure them space to grow
- Reward individual achievement, not just team
- Key benefits have been cash and flextime
- But now? Retirement savings and healthcare

149

GenX will lead America in the 2030s and 2040s.

How will they lead?

Mils

The New World

Birth Years: 1982-2000 Age in 2023: 23 to 41 How Many Born: 74,191,948

Formative Years: 1980s to (c.) 2018

151 152

Mils

"Overparenting got way out of control in the past generation."

Mils

Blackhawk Parents

153 154

Mils

Mils

U.S. Army recruitment ad

"The most important decisions start with the most important people."

> More "present".
> More guidance.

156

155

Parents:

Mils

Mils

- > Team players
- > Community active
- Declining teen social pathologies

TV Spot – todaysmilitary.com

157 158

Mils

Mils

The TIMES change, so the CORE VALUES change.

The TEACHINGS change, so the CORE VALUES change.

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160

Mils

59 of the 60 7th & 8th graders made it up the hill

Dr. Todd Marrah - Superintendent Tree Of Life Christian Schools - Ohio Mils

- **✓** Optimistic and enthusiastic
- ✓ Less certain about their nation
- \checkmark Respectful of elders' wisdom
- **✓** Focused on their education
- ✓ Close relationship with parents

161 162

3/15/2023

Mils

Mils

SUMMER JOBS: "Once a rite of passage, fewer teens are now looking"

TV Spot - coca cola

163

165

164

Mils

The human race's first constantly connected kids

Mils **TECH'S DAMAGE**

- > Sense of immediacy = impatience
- > Short attention spans
- Crave variety and change
- > Knowledge: remarkably superficial
- Learned in "mini-blasts"
- Tech addiction

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TECH'S DAMAGE TO SOFT SKILLS

Punctuality Communication **Critical Thinking Social Savvy**

Empathy Creativity

Organization Adaptability

Silent Fluency Phone Skills Mils

"Technologists know how phones really work, and many don't want their own children anywhere near them." NY Times 2018

Mils	Mils
"On the scale between candy and crack cocaine, tech is closer to crack cocaine." Chris Anderson, WIRED	"A wariness that has been slowly brewing is now turning into a Silicon Valley consensus. The benefits of screens as a learning tool are over-blown." NY Times – Dec. 2018
103	170
Mils	Mils
9/11: ages 1 to 19	Katrina: Mils are age 5 to 23
171	172
Mils	Mils
"33 Killed, 15 Wounded; Killer walked into classroom and opened fire" The School-Shootings Generation	Tsunami Gulf Oil Spill Haiti 'quake

Mils

Patriotic

Empowered

Engaged

Participate

Compassion

"They really care about their community."

Robert Bisi – Director, Youth Service America

175

Mils

Mils

"Extended Adolescence"
Job Sampling
Try various professions
Work for different employers
Have fun, travel

Fewer are marrying.

Marry later: around age 30.

Have children later.

Women bear children, don't marry.

177

178

180

Mils

Mils

Graduated college with highest-ever credit-card debt and college debt

179

Mils' experience with corporations, executives

Mils

Mils

Mils

"Sorry, corporate America. We're just not interested."

"We saw how you treated our parents, grandparents, and the **Bottom Percents...**"

181

182

Mils

"That sucks."

RADIO SPOT: anti-smoking and anti- executive

183

✓ Executive greed and crime

✓ Big fines

✓ Poor treatment of employees

✓ "Executives rarely take fall"

184

AS DONORS, VOLUNTEERS Mils

- ✓ Possess key core values for giving
- ✓ Few have money to give now
- ✓ But they will give their time
- ✓ A "group-think" joiner generation
- ✓ Giving USA: Have surpassed GenX in average household giving

AS DONORS, VOLUNTEERS Mils

- **✓ 45% attend religious services** regularly
- ✓ Like all generations, are giving less to places of worship
- ✓ But giving strongly to faith-based organizations & nonprofit hospitals

185

AS DONORS, VOLUNTEERS Mils

- ✓ Most likely generation to respond to direct mail
- ✓ Younger generations like at least a monthly letter from charities
- ✓ Will respond to direct mail & email
- ✓ Social media motivate younger generations more than older ones
- ✓ Same with use of QR codes

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AS DONORS, VOLUNTEERS Mils

- ✓ Might want to "give" differently
- √ So, listen and be open to their ideas
- ✓ Remind them: their generation thinks big and philanthropy is big

188

AS DONORS, VOLUNTEERS Mils

- ✓ They're dabbling with crypto
- ✓ Crypto is viewed by minorities as an "opportunity

189

COMMUNICATE WITH THEM Mils

- ✓ Very heavy users of mobiles
- ✓ Less use of desktop computers
- ✓ So, "mobile-optimize" your messages and platforms
- ✓ Website: make it easy and fast to navigate

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MILS' RECRUITING HOT BUTTONS

- ✓ Prefer a team/group culture
- **✓ Prefer entrepreneurial culture**
- ✓ Collaborative: like to share info
- ✓ Prefer decisions by consensus
- ✓ Seek challenging roles
- ✓ Seek advancement opportunities

MILS' RECRUITING HOT BUTTONS

- ✓ Work-life balance influences job choice and loyalty
- ✓ So does benefits package
- ✓ Key benefits: health insurance; paid vacation
- ✓ Retirement savings plan must wait until debt is erased

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MILS' RECRUITING HOT BUTTONS

- √ Stress organization's stability
- ✓ Stress commitment to individual
- ✓ Stress civic involvement
- **✓** Stress culture of transparency
- ✓ Be ready to involve parents

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MILS' RECRUITING HOT BUTTONS

- ✓ Stay in touch with Mils who leave
- ✓ Provide access to senior managem't
- ✓ Don't let social media replace eye-to-eye contact

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MILS' RECRUITING HOT BUTTONS

- ✓ Can you offer rotations?
- ✓ Mentorships? (Mils: do your part!)
- ✓ Special Projects?
- ✓ Offer a career "tree"
- ✓ Offer strong candidates a path to leadership

195

ONBOARDING MILS

- ✓ Be alert for "ghosting" (young Mils)
- ✓ Fast start to immerse them in the process
- **✓** Make their first day unforgettable
- ✓ Clear instructions for their tasks

196

MANAGING MILS

- ✓ Enable them to contribute asap
- ✓ Reward them with more responsibility
- ✓ Lots of feedback, lots of training
- ✓ Allow them to give input and listen

MANAGING MILS

- ✓ High levels of supervisor attention
- ✓ High levels of performance feedback
- ✓ High levels of positive reinforcement

(From research by Government Business Council)

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MANAGING MILS

- **✓** Give them clear job expectations
- ✓ Make training vibrant and relevant
- **✓** Give freedom within DETAILED framework

MANAGING MILS

- ✓ U.S. crisis: incivility. Confront it.
- ✓ Mils are not combative, might need protection/help
- ✓ Flextime can cause resentment

199 200

So That's How This Works:

- 1. Understand unique formative years.
- 2. Understand unique core values.
- 3. Connect with each generation in the workplace, marketplace, and living room.

2. No control over parents to whom we

1. No control over year we were born.

No Control

- 3. No control over the years that would be our formative years.
- 4. No control over the generation to which we belong.

201 202

What ALL Employees Want

- 1. Ethical, compassionate, smart leaders
- 2. Stimulating, meaningful work
- 3. Opportunity for advancement
- 4. Or, opportunity to stay put
- Security, stability, relevant benefits
- 6. **Quality of life**

What ALL Employees Want

- 7. Flexible work arrangements
- 8. Multigenerational input on policies
- 9. Give them a voice
- 10. Positive relationship with co-workers
- 11. Respect, recognition, transparency from boss
- 12. Inclusion and sense of ownership
- 13. Pride in their organization

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What ALL Generations Of Donors Want

- 1. Make a positive difference.
- 2. Know that, when they're gone, their philanthropy and their name will be alive and carry on their core values.
- 3. Hope that their charity will influence others to do the same.

Unstoppable...

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Additional Content America's Generations SILENTS BOOK and PBS DVD's Www.genimperative.com

CONTACT ME AT ANY TIME.

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And Thank You!

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