

Kari Dunn Saratovsky Derrick Feldmann

FOREWORD BY JEAN CASE

CAUSE FOR CHANGE

THE WHY AND HOW OF
NONPROFIT MILLENNIAL ENGAGEMENT



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Praise for *Cause for Change*

"Cause for Change is well researched and clearly and colorfully written. Kari Saratovsky and Derrick Feldmann provide a point-by-point action plan for nonprofits (and commercial businesses) to utilize the numbers, energy, dedication, and idealism of Millennials—America's next great generation—to change the nation and the world for the better in the decades ahead."

—**Morley Winograd and Michael D. Hais**, authors, *Millennial Makeover: MySpace, You Tube, and the Future of American Politics* and *Millennial Momentum: How a New Generation Is Remaking America*

"Cause for Change is a timely and compelling book that offers a critical guide for anyone working in philanthropy today. As organizations grapple with how to engage the rising generation of Millennials, Saratovsky and Feldmann offer executive leaders a straightforward approach and a road map to success in the twenty-first century."

—**Dottie Johnson**, president emeritus, Council of Michigan Foundations; trustee, W. K. Kellogg Foundation

"Millennials are at the nerve center of a growing movement of people who are passionate about their ability to make a positive impact on the world. Harnessing their talent, passion, and unique power is not just *a* priority for those in the social change business—it is *the* priority. Saratovsky and Feldmann have created an indispensable guide for leaders across all sectors who not only recognize but are ready to unleash the potential of a generation that is poised to change our communities and our world in the twenty-first century."

—Lynn Schusterman, chair of the Charles and Lynn Schusterman Philanthropic Network

“The generational divide within organizations and between nonprofits and their communities is the biggest threat to the future success of most organizations. *Cause for Change* is a gem of a resource for leaders of organizations struggling to bridge the gap between older leadership and Millennials who think and operate in very different ways. Pick this book up, don’t put it down, and put it into action!”

—Allison Fine, coauthor, *The Networked Nonprofit*

“Saratovsky and Feldmann present a people-oriented approach to adapting organizations toward the needs and engagement of Millennials. Building on the model of relationship-based fundraising that successful development officers and nonprofit leaders have used for years, *Cause for Change* reveals ways to engage Millennials and maximize their unique circles of influence to make a meaningful difference in the world.”


—Eugene R. Tempel, founding dean, IU School of Philanthropy

“The Millennial generation is inheriting an extraordinary set of social and environmental problems. But more, it’s inheriting the institutions, resources, and roles to solve them. Saratovsky and Feldmann offer an open hand for those trying to manage that inheritance. *Cause for Change* is not just a guide to understanding the sometimes curious behavior of Millennials but an actionable plan to engage them and capture their talents.”

—Jacob Harold, president and CEO, Guidestar

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Cause for Change

THE WHY AND HOW OF NONPROFIT
MILLENNIAL ENGAGEMENT

Kari Dunn Saratovsky
Derrick Feldmann

Foreword by
Jean Case

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*To Bis and Elias, whose encouragement, love, and good
humor
have anchored us through our writing—and always.
And to our “Generation Z” kids—Paige, Blair, and Liya—who
are a
daily reminder that the world they inherit is
only as good as the one we leave them.*

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FOREWORD: THE NEXT “GREATEST GENERATION”

Before transitioning to philanthropy, I spent nearly two decades helping to build a revolutionary new medium—interactive communications and the consumer Internet. Because these efforts were part of the broader burgeoning technology sector, there was a tendency to adopt an attitude of “If you build it, they will come.” Having led marketing efforts at the earliest online startups, I knew that even though we were taking something new to the market, some of the old rules for understanding and segmenting marketing efforts definitely would apply if we were to achieve mainstream success. By the time we launched the AOL service in 1989, it was clear that we needed to understand our audience beyond just “anyone with a modem.” We needed to know the characteristics of those who might find appeal in the service—and it became my job as chief of marketing to know the age group most heavily solicited by advertisers (which for many retail companies was and is eighteen to thirty-five, as these consumers are trendsetters and have a disproportionate influence on brand perception). To succeed at my job, I had to know exactly how to present an attractive, personalized appeal, what content influenced their decision to join, and what actions they would take once they were AOL members. I needed to know what issues they cared about, what times of day they were most likely to be in front of a computer screen, and whether they preferred to pay for things with cash or credit cards.

Now, as CEO of a philanthropic organization that invests in people and ideas that change the world, it has become even more important for me to know how market segments tick,

especially twenty- and thirty-something Millennials, who are so-called “digital natives” and are idealistic about the future. But this time I have a different purpose. At the Case Foundation, our employee ranks consist largely of this important youth demographic. Many of our initiatives are about Millennials and created by Millennials. They have helped our organization dismantle silos, resist hierarchy, and embrace and buck trends as quickly as they come, and they’ve helped us make “having fun and being social” key organizational goals. They’ve also helped us stay true to our desire to seek solutions and partners irrespective of sector or pedigree. Millennials—both in our workplace and in the broader world—have helped us innovate and grow. So naturally, given our deep involvement with and appreciation of Millennials, other nonprofit leaders often ask me why I believe so much in this generation. My answer is simple: *we can’t afford not to.*

Five years ago, *Cause for Change* coauthor Kari Saratovsky (Kari Dunn at the time) helped to lead the Case Foundation through the launch of an initiative examining the unique characteristics of what we termed “social citizens”—Millennials who were using new technologies and the unique characteristics of their generation to reshape activism and engagement. What we learned—and continue to see in our work in this space—is that this generation represents an epic shift in the way young people get involved, spend money, work together, and negotiate systems. They are transparent and collaborative; they don’t care about hierarchy or silos; they want solutions; and they use a revolutionary set of interactive, instant, and personalized technologies to navigate the world.

One of the most important lessons we have learned in our studies of this generation is that although many try to generalize the characteristics that epitomize Millennials (collaborative, transparent, tech-savvy), Millennials continue

to defy any one particular label. When Millennials think about changing the world around them, they don't think about it the way my generation (even in our twenties and thirties) thought about it. If government or nonprofits aren't moving fast or being effective, Millennials will channel their efforts through corporations or communities. And if corporations and communities aren't working, they'll use their dollars, followers, and friends to demand change or to support those institutions that are making change happen on their terms.

A decade of war sparked by a devastating attack on American soil, and a fragile economy have spurred Millennials to live in the moment and squeeze every last bit out of the here and now. These same experiences are also at the root of what makes this generation so incredibly special and unique. We know that bear markets have produced some of America's greatest innovations and most successful companies (IBM, FedEx, and Microsoft, to name a few), and I believe that the economic downturn that began in 2008, the lingering high unemployment rate despite the market recovery, and the unclear path forward, combined with unprecedented innovations in technology, have produced a generation that will create and mold dynamic new organizations, models, and approaches that will undoubtedly change the world. Add to this the remarkable number of those who have served our country and come home ready to roll up their sleeves in their communities, and the stage is set for something extraordinary to happen.

The generation that began about a hundred years ago—a generation defined by the Great Depression, two wars, an attack on our homeland, and a shift from farms to cities; that planted the seeds of the civil rights movement, launched scientific breakthroughs, and built great companies—has been called the “greatest generation.” We believe that the Millennials are America's *next* greatest

generation, and we had better make sure we know how to leverage, champion, and embrace them along their way.

At the Case Foundation, we've recently been thinking about two words quite a bit: *be fearless*. In this ever-changing world, if we want to be truly effective in solving social challenges, we must all take a fearless approach—we must take risks, be bold, and make failure matter. Bold young leaders are rising from the Millennial generation, which is collectively embracing this mantra. Millennials make big bets; they embrace experimentation; they don't let failures slow them down; collaboration beyond silos and sectors is second nature to them; and a spirit of urgency motivates everything they do. They are fearless.

Those of us charged with creating change have much to learn from this generation. We too must be fearless as we abandon ineffective traditions and norms to embrace the spirit of a generation that will forever rethink, retool, and redefine how giving back and doing good is done.

With nearly eighty million Millennials around the world who represent a combined \$300 billion in purchasing power, their impact will be unparalleled. If you and your organization want to innovate and be innovative, it is important to recognize the value that Millennials bring to the table. And if you don't already know it, you will learn in this book that Millennials don't simply want to be served or asked to serve. They want a meaningful seat and voice at the table. They want to roll up their sleeves and have a role in developing solutions. If you're smart, you'll listen and make room for them as you or your organization go forward.

In a 1936 speech to the DNC, President Roosevelt told the gathered crowd: "There is a mysterious cycle in human events. To some generations much is given. Of other generations much is expected. This generation of Americans has a rendezvous with destiny." Today, Millennials have certainly been given much—a flatter, more diverse world

with technologies that science fiction writers could have only dreamed of. At the same time, so much is expected of them—harnessing an ever-shifting global economy and keeping peace in times of rising conflict and obscure enemies. President Roosevelt’s words ring true for this generation—they unquestionably have a rendezvous with destiny, and they have the tools, the character and characteristics, the passion and the purpose to transcend boundaries and transform challenges into opportunities . . . to become America’s next greatest generation.

*January 2013
Washington, DC*

Jean Case
CEO
Case Foundation

PREFACE

Full disclosure: In 1979, when the majority of today's nonprofit executives were finishing college, starting their first jobs, and choosing career paths that would allow them to rise and ultimately sit at the helm of some of today's leading nonprofit organizations, the authors were in diapers, feasting on Cheerios, and happily watching *Sesame Street*. Thirty-three years later, as we sat down to write this book, each having spent more than a decade immersed in the public and nonprofit sectors, we were grateful to be able to watch our own children enjoy a very similar routine.

We don't typically offer up our age so quickly or so proudly. In fact, we usually qualify ourselves as "cuspers," as our birth dates fall on the cusp between Generation X and Generation Y. But we felt it was important to note this is a book about Millennials by Millennials for everyone seeking to better understand, well, Millennials.

Let's be clear: we're not here to defend our generation, nor are we cheerleaders for it. Like the generations that came before ours, we are pegged by generational generalities—oversimplified stereotypes that seek to place all eighty million of us in a nice little box with words like *coddled*, *narcissistic*, and *entitled* emblazoned on the sides. And although we can't deny that we have peers who fit these broad stereotypes, we also believe our generation is far too large and too complex to be constrained or defined by such labels.

The chapters that follow offer an honest assessment of the emerging trends we are witnessing across the nonprofit sector—and beyond—that we believe are being influenced in large part by our generation's eighty million members.

Here's how we see it: If the goal of our Baby Boomer parents was to beat the system, and the goal of Generation X was to defy the system, we'd say that the Millennial generation's intention is to do neither. We prefer building our own system, on our own terms, and we enthusiastically bring along others who share our vision and can help.

It's because of this approach that we think organizations can be opportunistic and use these qualities to their advantage when trying to engage the emerging generation of Millennials. Right now, the old way of working isn't exactly working. The problems are too vast, and organizations are not structured to react in ways that keep up with a generation who grew up in a twenty-four-hour news cycle.

There are already more than 1.8 million nonprofits out there competing for limited dollars, limited resources, and our limited attention spans. We see a struggle for survival coming between those organizations that can adapt and are willing to, versus those stuck in yesterday's reality. Because if Millennials can't shake things up from within, they will go at it alone—with an army of Facebook friends and Twitter followers rallying behind.

So rather than perpetuate the creation of new institutions that are in many ways duplicative and ineffective, what if we instead find new ways to get our institutions and the rising generation to mutually support one another? After all, although the world is flatter, faster, and more interconnected than ever before, individuals also have more power to achieve and to create change on their own terms than ever before, with a new ability to deliver their ideas to millions in an instant. We must work collectively and decisively in new ways if we are to affect our communities and society in the way we wish to.

Moreover, the problems that face our local and global communities call for exactly the values that Millennials

believe in—collaboration, teamwork, openness, and transparency. We believe the rising generation has an opportunity to recreate our systems and institutions from the inside out. That's going to take a new way of thinking. It's going to take a new way of organizing. And it's going to take a new acceptance of approaches that may seem a bit overwhelming to traditional institutions—many of whom have been operating in much the same way since the mid-twentieth century.

That's why we've written this book. We believe the best way to bring others along with us is to help them understand who we (Millennials) are—what drives us, what motivates us, and what turns us off and makes us run the other way. As the data and feedback reveal, we are a generation primed to give it our all, but we also have certain expectations of organizations and institutions. And we will consider those factors when choosing to engage as a volunteer, employee, or donor.

The Millennial story is still unfolding, as ten thousand Millennials turn twenty-one years old each day. What follows are stories, woven together with new research, articles, and personal experiences, that help uncover how Millennials—our peers—are driving much of the change within institutions and beyond.

WHY SHOULD YOU READ THIS BOOK?

If you lead an organization, you should read this book from two vantage points. First, read it to learn *how* to engage Millennials. Gone are the days of questioning whether or not you should start a Millennial engagement program or wait to do something in the future. This generation is today's workforce, today's donor base, today's volunteers, and

today's constituents. What better time than now to embrace it?

Second, read this book with an eye toward openness. Everything presented is based on the fundamental premise that your organization must be open to changing its current approach. Trying new ideas and methods is essential for succeeding with Millennials. This will challenge some traditional organizations, but it's a necessity if you want Millennials at the table with you solving today's social problems, rather than going at it on their own.

HOW *CAUSE FOR CHANGE* IS STRUCTURED

This book examines various strategies for engaging Millennials as constituents, volunteers, and donors, and focuses on how organizations can realign themselves to better respond to Millennials. The crux of *Cause for Change* is the Millennial Engagement Platform, an action-based rubric included in each chapter to help your organization create the infrastructure for a long-term Millennial engagement strategy.

After giving you a broad overview of the context and trends affecting the Millennial generation, we'll move through a series of specific behaviors and attributes. We'll examine how Millennials communicate, volunteer, take action, influence their peers, and choose to give their time and money.

We'll also look at how Millennials view their role in the workplace, and how their approach is reshaping nonprofit culture from within. Last, we'll profile Millennials who have emerged as dynamic leaders to create and manage movements in their communities, and we'll reveal how they

are thinking and acting in today's rapidly changing nonprofit environment.

Overall, we have structured this book to take you through a process of developing your Millennial engagement plan. Your Cause for Change platform should be coupled together with your strategic, marketing, and development plans and used as a strategy document to help guide your organization through the generational transformation happening today. No one has all the answers about Millennials (not even the authors), but we can provide a solid launch pad for decision making and adaptation. The conversation doesn't have to end here, either; we encourage you to join us at www.causeforchangebook.com to share your stories and lessons learned.

Cause for Change highlights a movement and a cultural shift that requires more than just the will of one person. We encourage you to use this book collaboratively by taking each chapter and dissecting it, discussing it, and using it to create your own Millennial Engagement Platform. We hope you'll do this as a team with your peers, colleagues, and volunteer leaders. The best movements start with ideas created by one, strategies developed by a team, and the commitment of group of people.

Now let's get started—Millennials are waiting to be engaged.

January 2013

Kari Dunn Saratovsky
Houston, Texas

Derrick Feldmann
Indianapolis, Indiana

ACKNOWLEDGMENTS

As two Millennials growing up during a time when the term “social network” came to mean something that exists only online, we would be remiss if we didn’t thank our extensive social networks. We mean those whom we’ve come to know both on- and offline, personally and professionally—all of whom have served as the inspiration and foundation for the ideas and concepts threaded throughout this book.

The beauty of the world we find ourselves in today is that we are in a constant state of learning with and from one another. We are amazed by the people we have encountered during the journey of writing this book. The generosity, candor, and creativity of both those we have known for many years and those we have come to know more recently have fueled us as well as these pages.

To be honest, writing a book was not exactly at the top of the bucket list for either of us. However, when our publisher, Alison Hankey, reached out shortly after the 2011 Millennial Donor Summit and told us that she could see the summit’s program as the table of contents for a book on Millennial engagement, we quickly agreed and began writing. Thank you Alison, Dani Scoville, Mary Garrett, Kristi Hein, and the rest of the team at Jossey-Bass/Wiley for taking a chance on us and our ideas and for helping us see this book through.

Thanks to the dynamic team at Achieve (the creative fundraising agency of which Derrick is CEO)—Joanna Nixon, Justin Brady, and Lara Brainer-Banker—for their creative thinking, passion, and savvy design skills that helped bring the pages of this book to life. And our thanks to Julia Rocchi, whose patience and guidance (not to mention her editing prowess) played a critical role in early drafts of our manuscript.

A special thank-you to our friends and colleagues at the Case Foundation, who have advanced the Millennial movement in the nonprofit sector and beyond. Your willingness to be fearless and take a chance on Millennial engagement through programs like Social Citizens and your investment in the virtual MCON Summit are a model for philanthropy. In particular, we extend special recognition to Jean Case for her visionary leadership and to Emily Yu and Michael Smith for their consistent dedication to strengthening the Millennial voice within the social sector.

In addition, we want to thank everyone who provided their stories, thoughtful ideas, challenges, and achievements that we included throughout the book: Maya Enista Smith, Brian Elliot, Ryan Brady, Marty Posch, Michael Manness, Michael Brinker, Dvorit Mausner, Zach Maurin, Jonny Dorsey, Ben Rattray, David Smith, Erica Williams, Jeff Slobotski, Aaron Hurst, Jake Wood, Lana Volftsun, and Amy Sample Ward, among many others. Whether you know it or not, your stories and your willingness to open yourselves and your organizations up to us are greatly appreciated.

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Lastly, we want to thank our most important social network—that of our closest family and friends. Although many of you still wonder what it is we do all day, we know that without your support, patience, and good humor this book would have never become a reality.

ABOUT THE AUTHORS

Kari Dunn Saratovsky is principal of KDS Strategies. She has spent her career working in both the government and nonprofit sectors building alliances, directing programs, and facilitating national efforts that advance social change. She established KDS Strategies to provide solutions to national and local organizations, with a focus on innovative program design, strategic communications, and social media strategy—all with a unique understanding of next-generation engagement.

Prior to establishing KDS Strategies, Kari served as vice president of social innovation at the Case Foundation and helped set the programmatic direction of the foundation as a member of its senior leadership. She also served as publisher of the highly regarded Social Citizens blog. Kari writes and speaks extensively on the rising generation of Millennials and how they are changing the nature of nonprofits and institutions.

Prior to her work in the philanthropic world, Kari was executive director of the President's Council on Service and Civic Participation, a presidential commission to support and expand volunteer service throughout the country and around the world. She also served as a senior advisor and White House liaison at the Corporation for National and Community Service. Kari is an avid volunteer and currently serves as chair of the board of Mobilize.org, board member for Repair the World, and advisor for startup Fuse Corps.

Derrick Feldmann is the CEO of Achieve, a creative fundraising agency. He is responsible for providing strategy to clients, overseeing the creative development of client work, and leading the full execution of fundraising efforts for clients. He leads the research team on the Millennial Impact

Project (www.themillennialimpact.com)—an annual research initiative to understand how Millennials connect, involve, and give—and leads the planning team for the Millennial Engagement Summit (MCON).

When not working closely with Achieve clients, he is a speaker on the latest trends in fundraising, online engagement, and Millennial donors. Prior to founding Achieve, Derrick was responsible for national fundraising efforts at the LEAGUE and Learning to Give organizations. During his time at these organizations, he led successful expansion efforts into six new markets, acquired national TV partners for awareness campaigns, and saw an increase of 200 percent in fundraising efforts under his guidance.

Derrick is a graduate of Southeast Missouri State University. He received his graduate degree from the Center on Philanthropy at Indiana University. Derrick is a board member of the International Association of Fundraising Professionals and the Starfish Initiative. He also serves on the Editorial Board of the Nonprofit Board Report.

Chapter One

The Importance of the Next Generation and Why They Matter to You

The world demands the qualities of youth. Not a time of life, but a state of mind.

—Robert F. Kennedy

How do you define young alumni engagement?”

Derrick posed this question to the president of a mid-size university with more than fifteen thousand alumni between the ages of twenty and thirty-three. The president spoke for fifteen minutes, but her response came down to this: “We want our young alumni to be present. To be a part of the university community on and off campus—to be here and show pride, to be dedicated to their alma mater, and to assist us in making the institution better for the long term.”

Great sound bites, to be sure, but they didn’t really answer the question. This was the answer you might hear in the boardroom if a trustee asked about the importance of young alumni engagement. It’s an answer we hear all too often from institutions that have probably not been proactive in their efforts to truly engage Millennials. Derrick wasn’t satisfied. So he followed the president’s answer with a much more direct question: “How do you *know* the university is connecting personally with young alumni?”

This was a critical moment. Not because Derrick was trying to trick the president of this very well-established institution, but because he was trying to understand the