THE MILLENNIAL MGO
How to be successful when everyone sees you as their kid
Wednesday, January 16, 2019
TONY BEALL
Trainer, Sanford Institute of Philanthropy
fund-raise

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#SIPwebinar
Meet today’s presenter

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IN THIS SESSION

What are millennial fundraisers thinking and feeling?

The Multigenerational Office

Overcoming fears with donors

The MAP to your career

Thoughts & Questions
Do you identify as a Millennial?

- Yes
- No
- I’m not sure...
- Other

*(submit via chat)*
What is a Millennial?
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The U.S. Bureau of Labor is projecting a 15% growth in fundraising jobs.

The current rate of Baby Boomers retiring each day.

http://www.pewresearch.org/topics/generations-and-age/

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What are Millennials Thinking & Feeling?
81% feel **anxious, nervous, or worried** before meeting a donor for the first time because of their age or perceived lack of experience.

70% interact with seasoned fundraiser colleagues at their organizations at least weekly.

85% do not seek out advice from seasoned fundraising professionals at their organization.

Association of Fundraising Professionals. (2016) Survey – Millennial MGO: How to be successful when everyone sees you as their kid.
6.5 of 10 say that using the phone is the least comfortable form of communication for them.
Survey Results

Association of Fundraising Professionals. (2016) Survey – Millennial MGO: How to be successful when everyone sees you as their kid.

81% not planning beyond 5 years

- 10+ years: 7.0%
- 5-10 years: 12.0%
- 3-5 years: 35.0%
- 1-3 years: 41.0%
- <1 year: 5.0%
HOW DOES AGE IMPACT YOUR CAREER?
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“I REALLY have to prove myself to obtain new projects and credibility”

“The perception that I am “cute” or an assistant when I have trained to be a development professional and am hardworking”

“Innovative and embraces technology to streamline internal processes”

“Many of my older board members will view me in the same regard as their children”

Association of Fundraising Professionals. (2016) Young Professional Survey
Overcoming fears and building relationships with donors
Mastering the Phone

- Ask a colleague/mentor if you can listen in when they make phone calls.
- Have a plan for the conversation.
- Practice, practice, practice!
- Block off time on your calendar to make phone calls. Reward yourself for success.
- Include phone calls in your metrics because what gets measured, gets done.
Mastering the Phone

**Things to Consider:**

What type of call is it?

Stewardship / Qualification / Scheduling / Solicitation / Donor Services

Constituency: *Who are you calling?*

Service Recipient / Grantor / Board Member / Longtime Donor / New Prospect

Factors: *What do you need to know prior to your call?*

Timing / Gatekeepers / Potential Questions / Giving History / Past Interactions
Navigating Prospect Meetings
Meeting Prep

Always prepare for a meeting

What is your meeting purpose?

What do you know about the donor?

How does this meeting help move the donor towards a gift?
RITE Discovery Meeting

Relate - Find commonalities between yourself and the donor

Invite - Be prepared with ways to get your donor involved

Take Away - Always leave the meeting with a follow-up item

Engagement Plan - After the meeting, develop the next steps

Download the handout! On the GoToWebinar control panel
Making the Ask

You need to have the Right P’s

✔ The **Right Prospect**
✔ The **Right Project**
✔ The **Right Person** making the ask

Timing is critical

“No” is not the end of the conversation
The Multigenerational Office
Set the Tone for Your Office

Balance flexibility and professionalism

Treat your colleagues like your donors

Confidence. You know what you’re talking about.

Be ready with a compelling story: Why you do what you do and why you are qualified to do it.

Believe your own story!
Set the Tone for Your Office

Read!

Get involved with the fundraising community outside of your workplace

Don’t be afraid to show your credentials!
The MAP For Your Career
Where are you now?

What is your fundraising experience?

What’s missing?

Opportunities for new experiences outside of your job?

Credentials?
Finding Strategic Mentors

A Good Mentor...

- Helps you learn the business
- Has been in your shoes and can provide great career advice
- Builds your network
Mentoring Action Plan (Map)

1. Evaluate your career goals
2. Find an aspirational mentor
3. Ask for a meeting
4. Prepare for the meeting
5. Meet your potential mentor
Make the Most Out of Your Meeting

- Come with an agenda in mind
- What do you want to get out of this conversation?
- What should your potential mentor get out of this conversation?
- If it feels right, ask for another meeting!
- Pay the bill
Maximize Your Network

ADVOCATES
The next level of professional contacts who help you make career moves

MENTORS
Close professional relationships who can provide advice

YOU
DEVELOPING A CAREER PLAN

- What do you want to be when you grow up?
- Work with your mentors to create a career strategy plan
- Inform your advocates of your career goals
- Work and trust your career strategy plan
Questions?

Please send them in the chat!
THANKS FOR HAVING ME

I want to hear from you!

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Wednesday, February 20
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THANK YOU!

We’d love to hear your feedback.

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