

DonorVoice

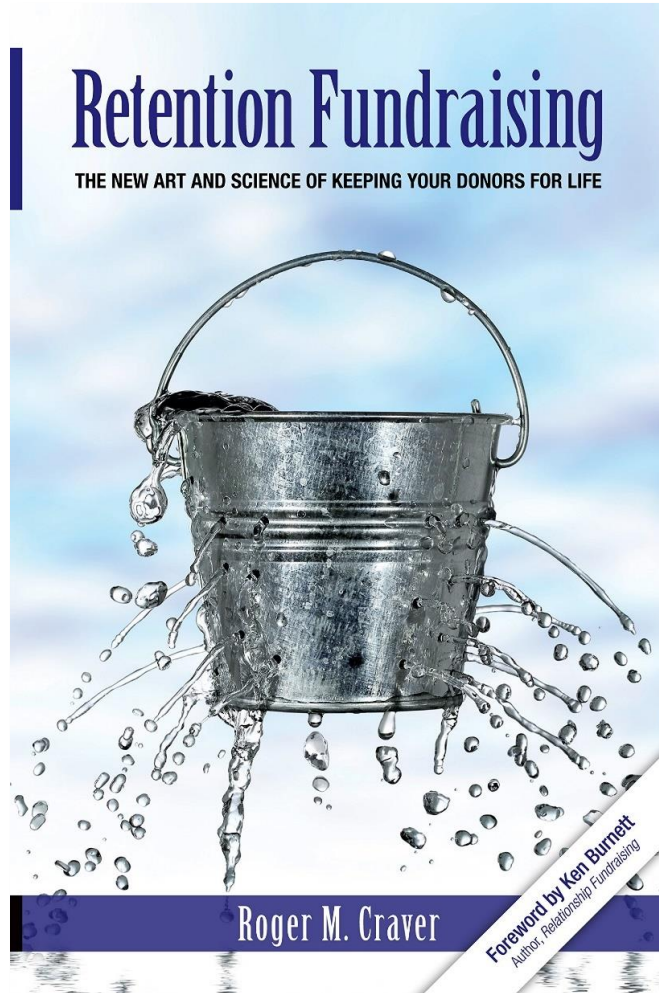
The Experience and Relationship Company

Why
of Human Behavior to Legacy
Marketing

- **Kiki Koutmeridou, Ph.D.**
- *Behavioral Science Strategist*
 - MSc Neuroscience
 - PhD, Cognitive Psychology
- **Applies Behavioral Economic Principles to Fundraising and Marketing**



DonorVoice work serves as the foundation for #1, best-selling fundraising book,
“Retention Fundraising, The New Art and Science of Keeping Your Donors for Life.”



“It’s Kevin’s work through DonorVoice that provided a new view, through a much improved lens that provides the empirical background for this book.

Few people in my career have had a greater impact than Kevin.”

Roger M. Craver, Author and Agitator

Why do people leave a legacy gift?



Gender

Religion

**Sports
team**

**Disease
survivor**

Hobby

**Alma
Mater**

identity

Parent

Profession

**Political
Affiliation**



Identity effects in charitable giving

Identity 1

Identity 2

Control

We had another female in your community who gave X dollars. How much would you like to give today?"



Immediate Results

↑15% increase in conversion rate

↑£10 more in donor value

And the information about the donor is even more valuable

Introduction

Good morning/afternoon/evening, you're through to <AGENT NAME>, on behalf of the RSPB. Are you calling for your Big Garden Birdwatch pack today?

Thanks so much. To make sure I get you exactly what you need I just need to take a couple of details, is that ok?

First can I ask which of the following best describes you?

- I am, first and foremost, a bird enthusiast
- I am, first and foremost, a nature enthusiast
- I would not describe myself as a bird or nature enthusiast

**Identity
Capture**

*[NOTE TO CALLERS – **BRIEFLY** BUILD RAPPORT BY RESPONDING TO THEIR STATED IDENTITY, IDEALLY BY MIRRORING IT WITH PHRASES LIKE 'ME TOO', OR 'DO YOU HAVE A FAVOURITE? MINES THE XYZ...']*

As a [IDENTITY], do you think it is necessary to be outdoors in order to really enjoy [birds/nature]? (yes/no)

*[NOTE TO CALLERS – **BRIEFLY** BUILD RAPPORT BY RESPONDING TO THEIR STATED PREFERENCE]*

It's great you want to join all the others who are getting involved with this years Big Garden Birdwatch...

If prospect identifies as 'Bird': ...since Birdwatch started results show **80% fewer starlings** **fewer house sparrows in our gardens**, so our work to preserve wildlife is important now more than ever...

**Identity
Reinforced for
Member Ask**

One of the aims of the Birdwatch is to get a snapshot of how [birds/wildlife] in the UK are doing; it helps us see which are doing well and which might be in trouble.

We've so many ongoing and upcoming projects aiming to help stop and hopefully reverse these declines that are only possible through working together to help nature thrive. If you're someone who cares about [STATED IDENTITY] I know you'll be encouraged to **hear [ONE OR TWO SENTENCE/S ON IDENTITY SPECIFIC PROGRESS]**. But of course the need continues to be great.

As someone who [REFERENCE IDENTITY] and wants to [PREFERENCE] why don't you join the many others like you who've become members?

QUICK TIPS

Identity “Light” Use Nouns Not Verbs

- Supporter not supporting
- A Considerer (of PG) not considering

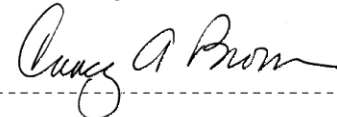
Dear Carol A Monte,

Thank you for your recent donation of \$10.00 to support the American Heart Association. Your ongoing work to improve cardiovascular health in communities across the country. Below are ways your support is making an important difference:

- Last year we funded more than \$17.7 million in research focused on children’s health and congenital cardiovascular defects. We also joined with the Children’s Heart Foundation in an initiative that will provide \$22.5 million in research funding through 2021.
- We train more than 18 million people each year in the lifesaving techniques of cardiopulmonary resuscitation, and our advocacy efforts have helped to advance legislation requiring CPR training in high schools in 28 U.S. states (as of March 2016).
- For cardiovascular disease and stroke patients and caregivers, we’ve created an online Support Network that has more than 14,000 registered users sharing their inspirational stories of survival, recovery, and hope. You can share your story, find valuable resources, and submit questions to our medical experts at supportnetwork.heart.org.

These are just a few ways the American Heart Association is working to build healthier lives, free of cardiovascular diseases and stroke. Thank you again for all you do on our behalf.

Sincerely,



Nancy Brown
Chief Executive Officer

Thank you for
being a
supporter and
your recent...

April 22, 2016

ical to our
of how your



American
Heart
Association

American
Stroke
Association

What if



identity

Includes

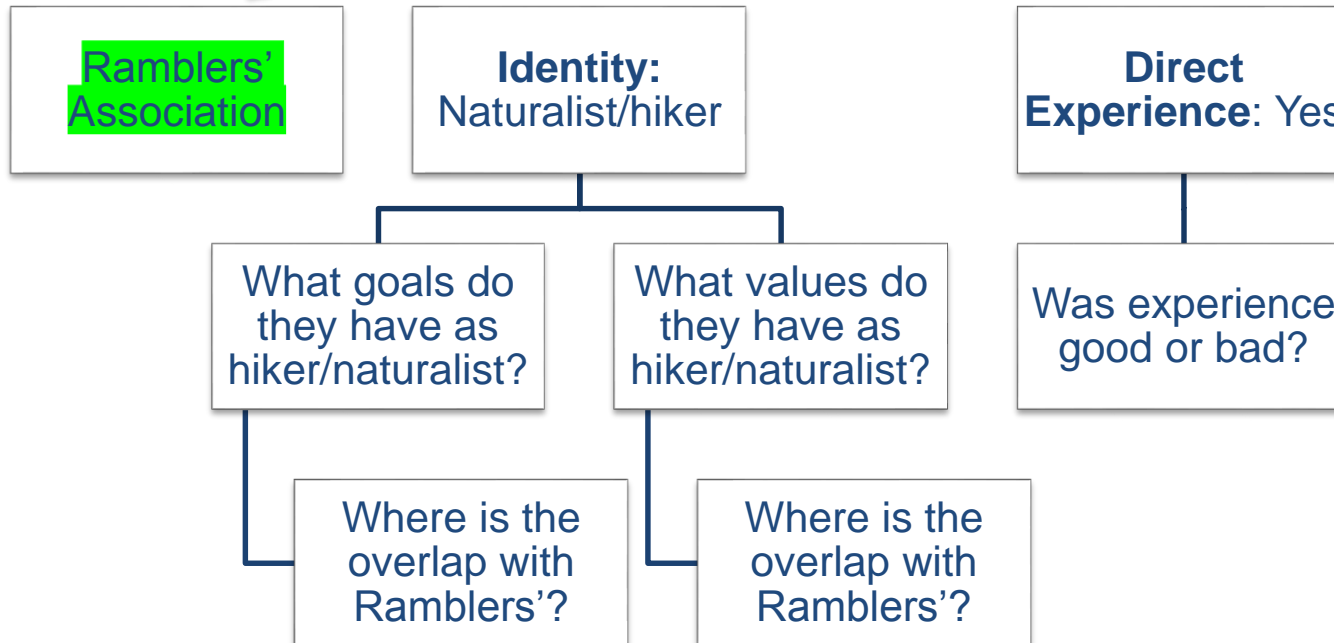
**First-hand
experience**

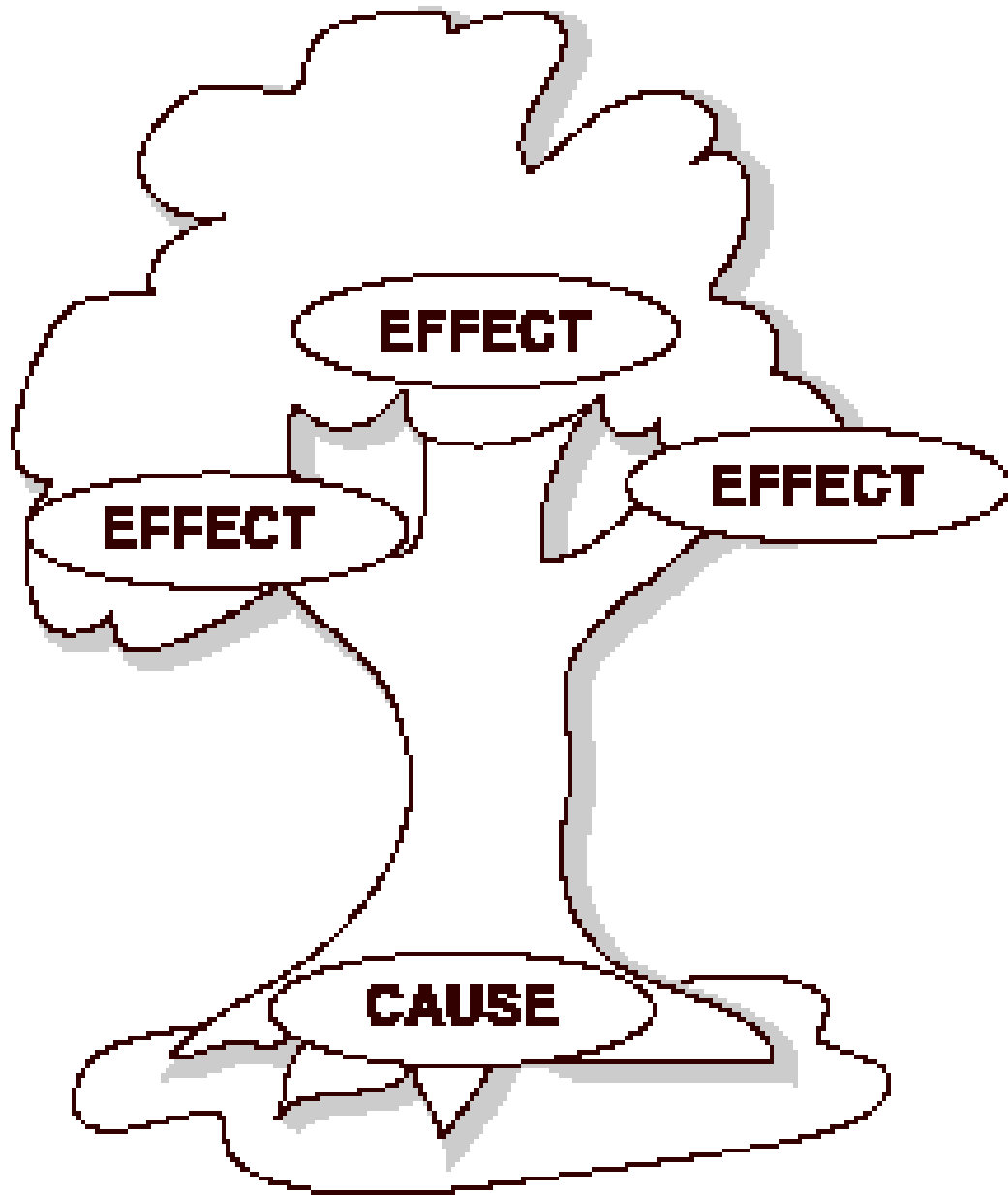


Identity	Experience Rating	Total Past Giving	% Considering PG	Commitment Score
Direct Beneficiary	Positive	£489.27	23%	8.6
Direct Beneficiary	Negative	£286.02	4%	6.8

“[In my will] there’s the Youth Hostel Association, first of all...it’s where my wife and I met....Then there’s the Ramblers’ Association. We’ve walked a lot with the local group...Then Help the Aged, I’ve got to help the aged, I am one... The there’s RNID because I’m hard of hearing...Then finally, the Cancer Research. My father died of cancer and so I have supported them ever since he died.’
Male, 89, married,

(Routley, 2011, p. 220-221)





Are you in the business of:

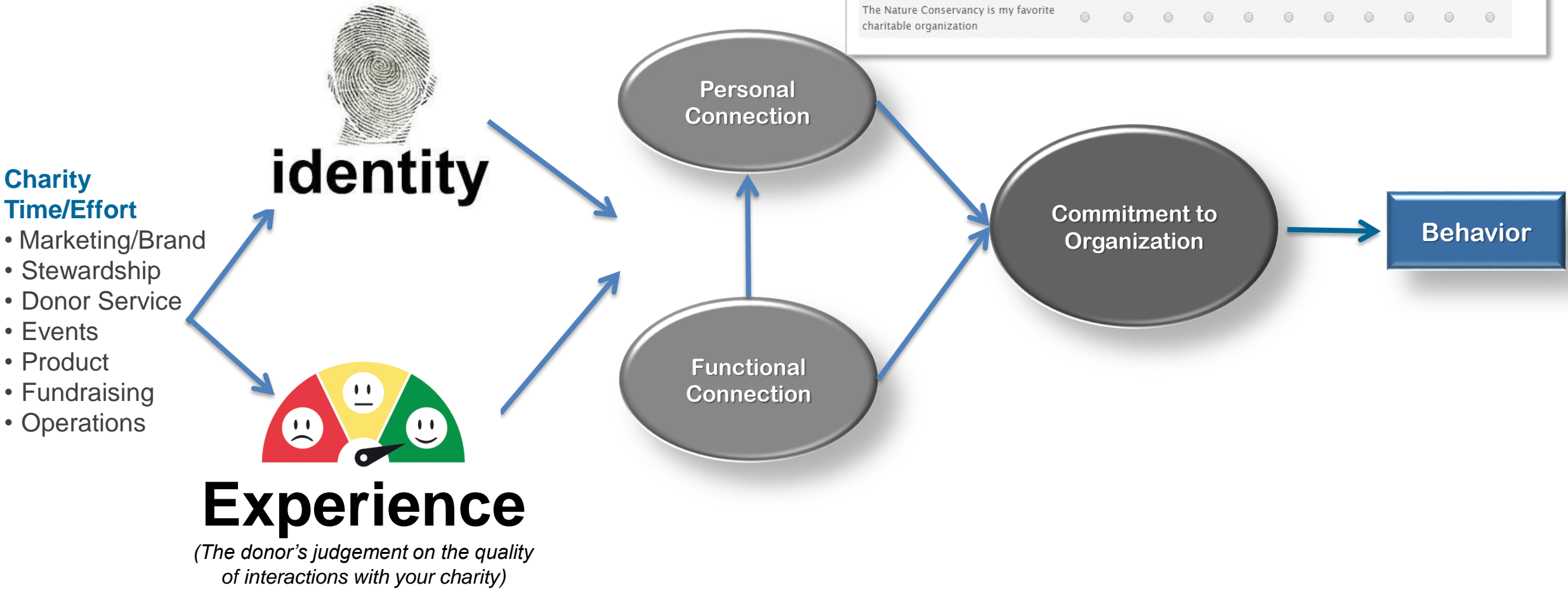
Creating legacy prospects (cause business)

OR

Just identifying them (effect business)

On a scale of 0 to 10, please indicate how much you agree with each statement with "10" being "strongly agree" and "0" being "strongly disagree".

	Strongly Disagree, 0	1	2	3	4	5	6	7	8	9	Strongly Agree, 10
I am a committed Nature Conservancy donor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel a sense of loyalty to The Nature Conservancy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Nature Conservancy is my favorite charitable organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



If in the effect business...

<i>Russell James: consideration question</i>	Frequency	Commitment Score	Amount donated per year	Years on file/tenure	# donations per year
I have left a gift in my will or trust or by beneficiary designation.	14	8.81	\$4,714.62	12.86	2.38
Leaving a gift to American Heart Association is something I intend to do.	17	9.27	\$4,552.84	5.41	4.50
Leaving a gift to American Heart Association is something I am considering doing.	118	8.56	\$2,092.83	5.66	2.36
Leaving a gift to American Heart Association is not something I will do.	145	7.07	\$1,878.37	6.02	2.23

Commitment Score	Capacity Model Score
10	8 - Less than \$2,500
10	8 - Less than \$2,500
10	8 - Less than \$2,500
9	8 - Less than \$2,500
9	8 - Less than \$2,500
9	8 - Less than \$2,500
9	7 - \$2,500 to \$9,999
9	7 - \$2,500 to \$9,999
8	7 - \$2,500 to \$9,999
8	6 - \$10,000 to \$24,999
8	4 - \$100,000 to \$249,999
7	8 - Less than \$2,500
7	6 - \$10,000 to \$24,999
7	5 - \$25,000- \$99,999
6	7 - \$2,500 to \$9,999
5	5 - \$25,000- \$99,999
5	8 - Less than \$2,500
5	8 - Less than \$2,500
5	7 - \$2,500 to \$9,999
4	4 - \$100,000 to \$249,999
3	7 - \$2,500 to \$9,999
2	7 - \$2,500 to \$9,999

No meaningful difference on RFM

The danger of proxy data and not understanding why of human behavior

SCORE DECILES	COUNT	NUMBER OF GIVERS	PERCENTAGE OF GIVERS
1	726	12	1.7%
2	730	27	3.7%
3	758	48	6.3%
4	743	115	15.5%
5	736	146	19.8%
6	742	222	29.9%
7	739	340	46.0%
8	740	414	55.9%
9	740	523	70.7%
10	739	649	87.8%

Factors that triggered dropping the charitable plan

1. **Becoming a grandparent** 0.7226* (0.2997)
2. **Becoming a parent** 0.6111[†] (0.3200)
3. Stopping current charitable giving
0.1198* (0.0934)
4. A drop in self-rated health 0.0768[†] (0.0461)

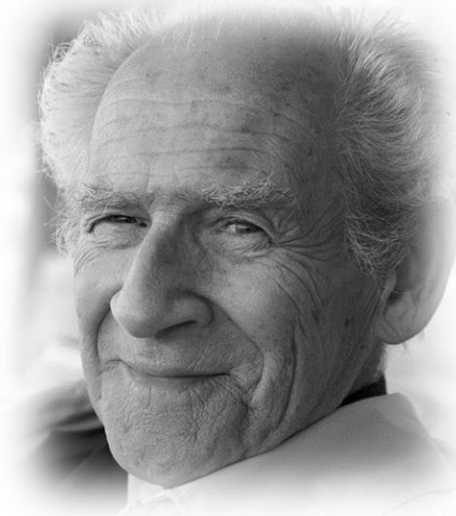
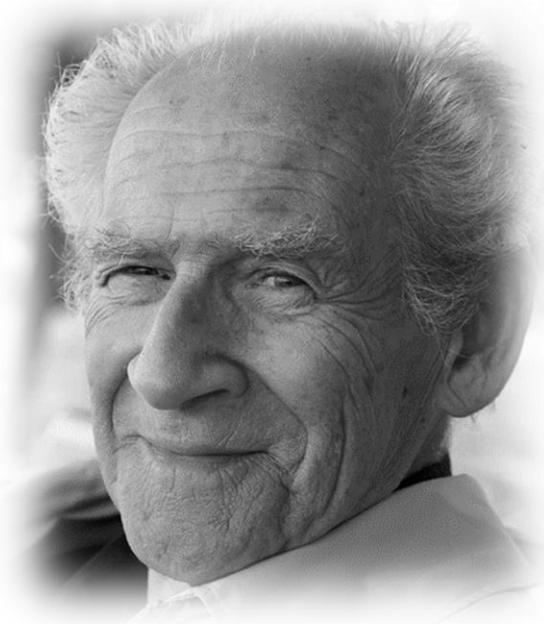
**Fixed effects analysis including 1,306 people who reported a charitable plan and later reported no charitable plan. Coefficients show relative magnitude of factors.*

NETFLIX

“There’s a mountain of data that we have at our disposal. That mountain is composed of two things. Garbage is 99 percent of that mountain. Gold is one percent... . Geography, age, and gender? We put that in the garbage heap. Where you live is not that important.”

- Todd Yellin, Netflix’s VP of product innovation.

Which Pair Belongs Together?



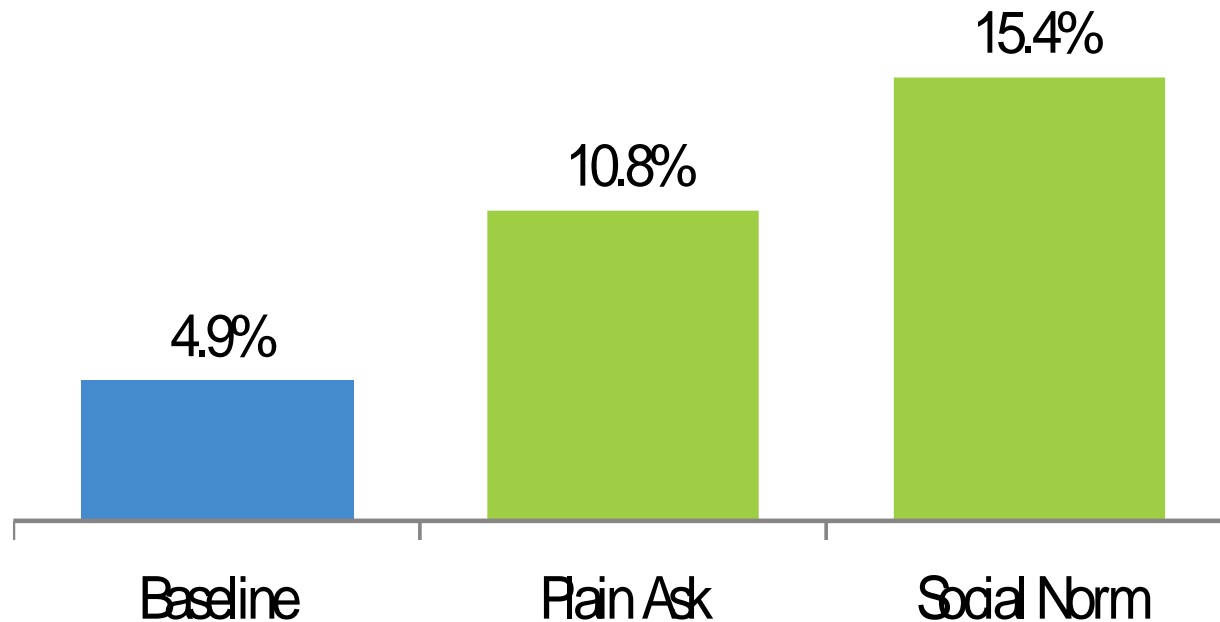
What if these two are:

- People who like romantic comedies...OR
- Cancer caregivers who received direct support from Charity X
- Alumni and had good experience at College X
- Conservationists who talk regular walks in Charity X nature preserve

DonorVoice

The Donor Experience and Relationship Company

Trial 5: Signing up to legacy giving



People with children slightly decreased their giving (-0.6%) in both conditions

Social norm message:

"Many of our clients like to include a charity in their Will. Are there any charities that you would like to include in your Will?"

Family Message :

“Would you like to leave any money to a charity that you and **your family** are passionate about in your will”

14%
better

People
without
children

Priming with
negative
consequence
s
for those with
kids

Priming with
negative
consequence
s
for those
without kids

Posthumous Message:

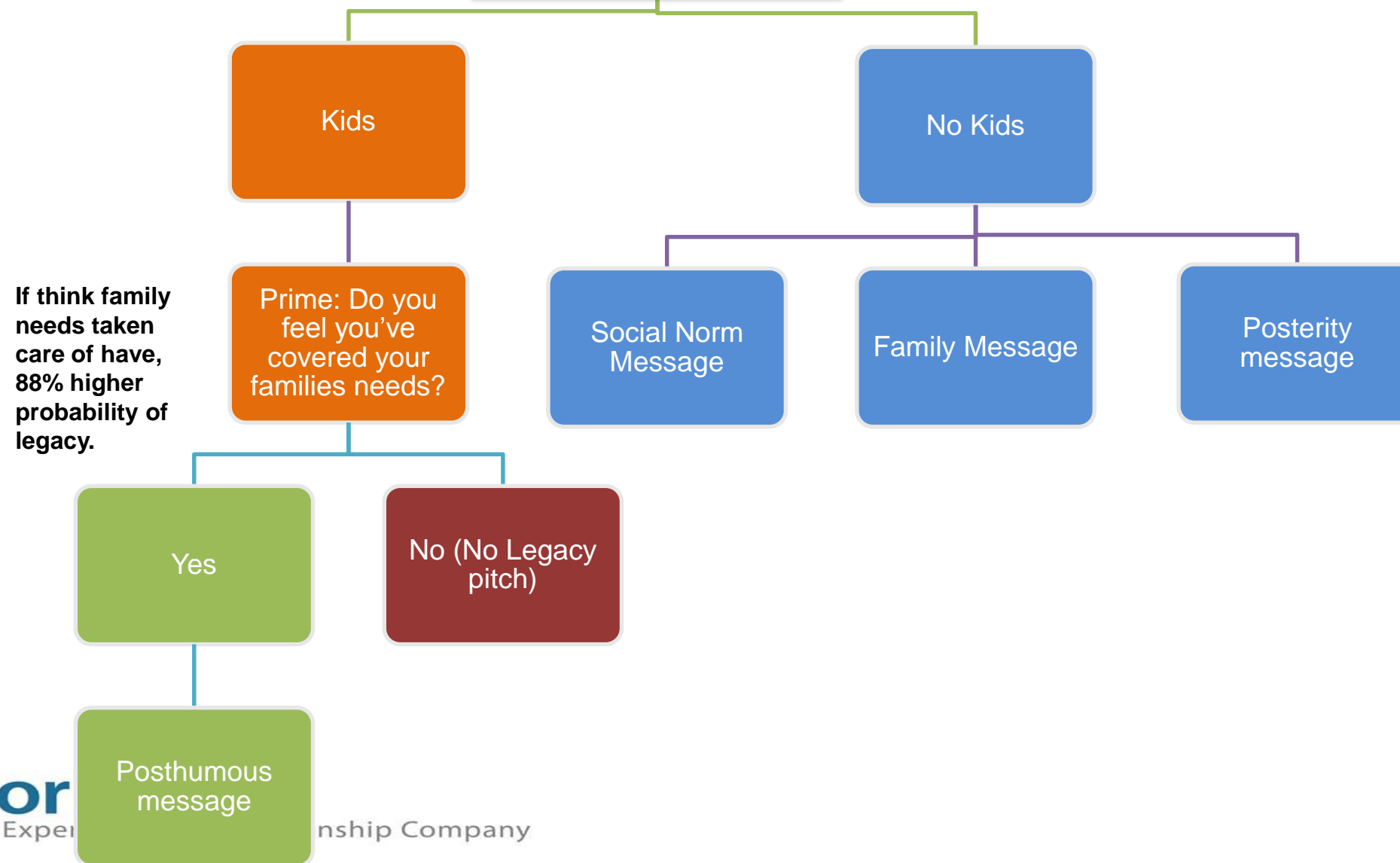
“Would you like to leave any money to charity in your Will to help the charities you care about carry on their work **after you're gone**”.

13%
better

People
with
children



Free will
service to lower
hassle factor



QUICK TIPS

Stories of legacy donors:

Living donor stories outperformed all other messages for 40 out of 40 charities tested including stories of deceased legacy donors.



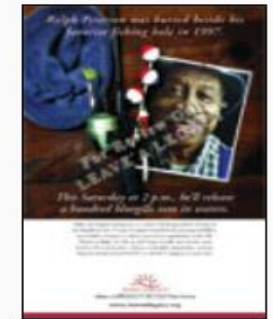
Carpenter



Coach



Doctor



Fishing



Janitor



Pet Groomer



Symphony



Bonus Offer – Free Audit

kkoutmeridou@thedonorvoice.com



Janice promised that older people wouldn't have to go for weeks without seeing a friendly face.

“When I moved away from my mother 8 years ago, I never really thought about her old age. Then when my father passed away 4 years later, I realised that my mother was not only getting older, she was getting lonely. That's when I started thinking about the importance of organisations like Royal Voluntary Service.”

ROYAL
VOLUNTARY
SERVICE
Together for older people



Connection to
cause
Social Proof

Family Need
Posterity

FAMILY AND FRIENDS FIRST

Leaving a gift in your Will can change the lives of many people. We understand that your loved ones should come first but leaving even 1% of your estate to charity can make a huge difference to the lives of many more people.

EVERY GIFT WILL MAKE A DIFFERENCE

We're immensely grateful for every gift we receive, whether it is a specific sum, an item, or a small percentage of whatever is left once you have thought about those close to you.

WE PROMISE TO USE YOUR MONEY WISELY

Gift in every £1 we receive goes directly towards helping older people all over the country. The remaining 9p goes towards raising more funds and helping us manage the charity effectively.

THREE WAYS TO LEAVE A GIFT IN YOUR WILL

A SHARE OF YOUR ESTATE

This is also known as a residuary gift. It's the most valuable way to leave a gift as it's protected from inflation.

A FIXED AMOUNT OF MONEY

Donating a gift of money is also known as a pecuniary gift.

A SPECIFIC GIFT

You may have something valuable that you would like to donate to us in your Will, such as items of jewellery, shares or a property.

SUGGESTED WORDING FOR YOUR WILL

Having an up to date and valid Will is the only way of ensuring your wishes are carried out. We recommend that you prepare your Will with a qualified solicitor, who will be able to advise you on the best gift for your circumstances.

Your solicitor will need our registered charity number in your Will, which is Royal Voluntary Service, 1 Business Park, Cardiff CF23 8AP, registered charity SC038924. We also have some suggested clauses which are available on our website at www.royalvoluntaryservice.org.uk/legacies or by returning the attached form. If you would like to leave a legacy to benefit your area, please get in touch so we can discuss how to make best use of your gift.

Hassle

GET IN TOUCH

If you are considering leaving a gift in your Will to Royal Voluntary Service, we would love to hear from you. Knowing your intentions will give us confidence that we can continue to be there for lonely older people in the years to come.

For more information or to let us know of your intentions, please complete the form below and send it in an envelope to the freepost address on the reverse.

0122
service.org.uk

Trust
Effectiveness

Address

Postcode

Home telephone

Mobile

Email

Tick to indicate your intentions

- ☐ I intend to leave a gift in my Will to Royal Voluntary Service
☐ I have already left a gift in my Will to Royal Voluntary Service
☐ I am unable to support you in this way, please do not contact me again.

Tick to request further information

- ☐ Please send me information about
☐ I would like to speak to someone

RESPECTING YOUR PRIVACY

We understand that your Will is a private document and we want to tell you your decision. However we can say thank you and to help with any questions you may have. If you do get in touch we assure you complete confidentiality and you are free to change your mind at any time.

We would like to keep you informed about our work that you are helping to make possible. If you don't wish to receive any further information from us please tick this box. ☐

Intend vs
Consideration

ROYAL
VOLUNTARY
SERVICE
Together for older people

Urgency