SUSTAINABLE PHILANTHROPHY
WITH PLYMOUTH UNIVERSITY

The Science of Legacy Fundraising
Final Report August 2015

A joint project with

Listen

CONTENTS

INTRODUCTION

Listen and the Centre for Sustainable Philanthropy have been working together to test how the latest academic thinking can be applied to telephone legacy fundraising.

We aim to achieve three objectives in this project:

1. Understand what psychological factors drive legacy decisions;
2. Optimize the application of this understanding during telephone conversations; and
3. Identify the most meaningful and positive way to support legacy decision-making.

To date, we have run tests with:

Test 1: A community focussed international development charity

Test 2: A UK charity working with disadvantaged children and young people

Test 3: A humanitarian charity with both a UK and International presence

Test 4: A UK children's charity tackling abuse and neglect

Test 5: A Christian international development charity

Test 6: A UK health charity

The test conditions applied to each campaign are summarised in Appendix 1.

All information we used in scripts is factually correct and validated by the charities. There is no deception in any tests. Only anonymized data is shared by Listen with the Centre for Sustainable Philanthropy: donors' anonymity is strictly protected.

TEST 1

OUTCOME

The overall results of the campaign are given below. There are five types of responses. Hard no and Soft no are considered as a NO response, while the other three are considered as a YES response. These are the most often used categories of responses in our tests. Different organizations however sometimes choose to use different response categories.

Table 1: Overall number and percentage of responses in the campaign

Type of Responses	Percent of Responses
Hard no	63.3%
Soft no	17.4%
Considering a legacy	14.56%
Intender	1.22%
Pledger	3.52%
TOTAL	100%

OUTCOME BY TEST

SOCIAL INFORMATION

Social information was shown to influence life-time giving during telephone fundraising in the US (Shang and Croson 2008; Shang, Reed and Croson 2008). This finding was applied to legacy fundraising by the Behavioural Insight Unit in the UK (Cabinet Office 2014). This research extends previous research by understanding the precise nature of what social information influences legacy giving and during which stage of the telephone conversation. It aims to optimize the way social information is used during legacy conversations.

- Konkoly and Perloff (1990) show how beliefs about subjective norms were important in the intention to leave a legacy to one's college. They argue that subjective norms are particularly important when supporters engage in an unfamiliar activity such as writing a will.

- Terror management theory (Greenberg, Pyszczynski, and Solomon. 1986; Solomon, Greenberg, and Pyszczynski 1991) indicates that when we are sensitised to our own mortality, we cling to our own community and its values and norms. This theory argues that discussion about writing a will may make mortality salient in our minds. In those situations, subjective norms are particularly important when we engage in an activity that a majority of others engage in.

Both theories predict that social information may influence legacy decision-making, but they disagree about what social information may be effective. We thus test minority versus majority social information in the following scripts.

- 1/3 of our most loyal supporters haven't made a will. Many of them are taking advantage of the Will Aid scheme

- 2/3 of our most loyal supporters have made a will. Many of them took advantage of the Will Aid scheme

The exact same social information is presented, yet one highlighted minority behaviour while the other highlighted majority behaviour. Regardless of whether people answered YES or answered NO to these questions, their responses to legacy asks differ.

To understand their effects, we first conducted a logistic regression. It shows that there is a significant difference between the two tests. In fact, the probability of these differences being caused by chance is close to zero. This effect exists whether we include control variables or not. In this analysis, we combine the Hard No and the Soft No responses into the NO response. We combine the considering, intending and pledging conditions into the YES response.

Of all the people in the 1/3 supporter condition, 76% of them said NO and 24% of them said YES. In the 2/3 supporter condition, 84% of them said NO and 16% of them said YES. This means in the 1/3-supporter condition, one out of every four people accepted a legacy ask, while in the 2/3 supporter condition, one out of every five people accepted a legacy ask. This result is statistically significant even when gender, last gift amount and length of support are controlled for.

Table 2: Percentage of Yes and No responses per condition

	1/3 of our most loyal supporters haven't made a will. Many of them are taking advantage of the WillAid Scheme.	2/3 of our most loyal supporter have made a will. Many of them took advantage of the Will Aid scheme.
NO%	76%	84%
YES%	24%	16%
Total	100%	100%

Further multinomial logistic regression analysis reveals that the difference between the two tests lies primarily in those donors who are considerers and intenders.

Table 3: Percentage of responses by type per condition

	1/3 of our most loyal supporters haven't made a will. Many of them are taking advantage of the WillAid Scheme.	2/3 of our most loyal supporter have made a will. Many of them took advantage of the Will Aid scheme.
Hard No	60.45%	65.47%
Soft No	15.58%	18.79%
Considering	18.34%	11.68%
Intender	1.81%	0.76%
Pledger	3.82%	3.29%
Total	100%	100

In the 1/3 condition, 18% of donors say that they would consider leaving a legacy to Charity X, while only 11.68% of donors in the 2/3 condition say the same. This is an about 1.5 times higher response rate. In the 1/3 condition, 1.8% of donors say that they intend to leave a legacy for Charity X, while only 0.76% of donors in the 2/3 condition say the same. This is about 2.4 time's higher response. Both of these differences are statistically significant even when gender, last gift amount and length of support are controlled for.

TEST 2

OUTCOME

The overall results of the campaign are given below. There are five types of responses, the same as Test 1. Hard no and Soft no are considered as a NO response, while the other three are considered as a YES response.

Table 4: Overall number and percentage of responses in the campaign

Type of Responses	Percent of Responses
Hard no	56.57%
Soft no	16.07%
Enquirer	14.30%
Considerer	12.79%
Intender	0.27%
TOTAL	100%

OUTCOME BY TEST

SOCIAL INFORMATION

We built on our learning from Test 1 and tested here not just the effect of "what" others did in the past, but also "what changed" in others' actions. We also changed the position of where we inserted social information from where callers discuss Will Aid with supporters, to where callers discuss leaving a legacy with supporters. We tested the effectiveness of the following two scripts to mimic the structure of our previous tests: a minority (i.e. a decline in others' actions) and majority action (i.e. an increase in others' actions).

- **But in recent years, we have seen a <u>drop</u> in the number of legacies we are receiving. That's why we feel it's so important to learn what our supporters think about them.**

- **Recently, we have seen an <u>increase</u> in the number of our supporters enquiring about gifts in Wills. That's why we feel it's so important to learn what our supporters think about them.**

Firstly, a logistic regression shows us that there is no significant difference between the two tests. Here we combined the "Soft No" and the "Hard No" conditions into the "No response" and the rest of the positive responses to the "Yes" response. The percentage of supporters saying yes to the "increase" condition is statistically the same as the percentage of supporters saying NO.

Table 5: Percentage of Yes and No responses per condition

	But in recent years, we have seen a drop in the number of legacies we are receiving. That's why we feel it's so important to learn what our supporters think about them.	Recently, we have seen an increase in the number of our supporters enquiring about gifts in Wills. That's why we feel it's so important to learn what our supporters think about them.
NO%	71.05%	74.74%
YES%	28.95%	25.26%
Total	100%	100%

Further investigation using multinomial logistic regression reveals that the "increase" condition has fewer "Soft Nos" as well as "Considerers." Both of these two categories of respondents seem to have been moved to the Hard No condition. When it comes to making the legacy decision, supporters seem to use "the drop in the number of legacies" as a signal that their own help is needed. As a result, when there is a drop, people are less likely to say "Hard No."

Table 6: Percentage of responses by type per condition

	But in recent years, we have seen a drop in the number of legacies we are receiving. That's why we feel it's so important to learn what our supporters think about them.	Recently, we have seen an increase in the number of our supporters enquiring about gifts in Wills. That's why we feel it's so important to learn what our supporters think about them.
Hard No	51.64%	63.04%
Soft No	19.41%	11.7%
Enquirer	13.93%	14.78%
Considerer	14.71%	10.27%
Intender	0.31%	0.21%
Total	100%	100%

The effect of social information we tested in Test 1 and Test 2 seem to suggest that "minority" and "declining" social information encourages legacy consideration and intention. Both seem to point to the same underlying psychological motivation of why people leave a legacy to charities: a phenomenon called Bystander Effect by psychologists (Darley and Latané 1968). Researchers found that when people think there is a need for them to help and yet others haven't helped yet, they are more likely to stand up to their responsibility and help. What this research suggests is that if we directly prime people's perception about the need for them to help, we may obtain the same effect as what we obtained by priming "minority" and "declining" social information. In order to identify the most personally meaningful and positive way of supporting legacy decisions, we aim to answer two questions in our follow-up tests:

1. **What might be the best way to directly encourage supporters to think about the need for their legacy gifts? Might it be through feelings or thinking towards or about the charity? Might it be through the consideration of the actual needs themselves or the values they aim to promote through the fulfilments of those needs?**

2. **Is there any way "positive" social information (majority or increasing social information) may be used during legacy conversations?**

TEST 3

OUTCOME

The overall results of the campaign are given below. There are seven types of responses. Hard no and Soft no are considered as a NO response, while the other five are considered as a YES response. In Test 3, we differentiated those who would consider a legacy gift but would prefer not to receive a legacy booklet from those who would consider a legacy gift and would like to receive a legacy booklet.

Table 7: Overall number and percentage of responses in the campaign

Type of Responses	Percent of Responses
Hard no	63.16%
Soft no	3.28%
Interested	2.56%
Considering a legacy	7.96%
Considerer with information (Enquirer)	21.2%
Intender	0.75%
Pledger	1.08%
TOTAL	100%

OUTCOME BY TEST

SOCIAL INFORMATION

We learned from our previous tests that "minority" and "declining" social information encourages legacy consideration and intention. Once supporters identify themselves as a considerer of a legacy gift, this next test studies whether "positive" social information may be used to encourage them to receive legacy booklets and potentially make a more informed decision about leaving a legacy. This sentence below was inserted into half of the conversations after people said they would consider leaving a legacy to the Charity X:

- **Many of the supporters we've sent the information pack to have found it very helpful. Can I send you one too?**

Since it was not inserted before the legacy ask, we would not expect it to make a difference in converting "No" answers to "Yes" answers. We expected that the information would be able to convert those who are considering leaving a legacy to considerers who would like to receive additional information. Our results confirmed our hypotheses.

Without the social information, 10.12% of the considerers prefer not to receive the booklet and while 18.28% of the donors prefer to receive it. With social information, those not wanting the booklet were only 6.87% and those wanting it became 22.68%. This is a conversion of about 1/3 of the considerers into considerers who would like to take one additional engagement action in their journey to making a legacy gift. Both of these differences are statistically significant even when gender is controlled for.

Table 8: Percentage of responses by type per condition

	Control	Social Information
Hard No	63.85%	62.82%
Soft No	2.98%	3.44%
Interested	2.95%	2.37%
Considering a Legacy	10.12%	6.87%
Considerer with Information (Enquirer)	18.28%	22.68%
Intender	0.72%	0.76%
Pledger	1.10%	1.07%
Total	100%	100%

FEELING VERSUS REASONING

Both feeling and thinking were shown to influence life-time giving during fundraising campaigns in the US (Jenni and Loewenstein 1997; Small, Loewenstein and Slovic 2007). This research extends previous research by understanding the precise nature of how feelings and reasoning influence legacy giving. In particular, it aims to understand the moment of when people choose to become a supporter. A deeper understanding of those moments, along the feeling and thinking dimensions, we think could help find the best way to support meaningful and positive legacy decision making.

We compare the following scripts:

- **Can you tell me what inspired you to support Charity X?**

- **We know that people have many warm feelings about becoming a Charity X supporter. Can you tell me what inspired you to support the Charity X?**

- **We know that people have many different reasons for supporting Charity X. Can you recall the moment when you were inspired to become a Charity X Supporter?**

We found no difference between the control condition and the feeling versus reasoning conditions in any responses during Test 3. This means the testing conditions performed equally well as the control condition, but it didn't over perform. This does not mean that promoting "important feeling" or "important reasons" of why people are inspired to support the charity is ineffective. It means that one sentence alone in the way we asked it was not powerful enough to trigger the right feelings and the right reasoning.

Learning from this result, we refined the questions to explicitly ask supporters about growing versus declining needs and how important the values promoted by charities are to them in our follow-up tests.

TEST 4

OUTCOME

The overall results of the campaign are given below. There are six types of responses. Hard no, Not interested ever and not interested now are considered as a NO response. The other three are considered as a YES response.

Table 9: Overall number and percentage of responses in the campaign

Type of Responses	Percent of Responses
Hard no	50.59%
Not interested ever	12.56%
Not interested now	10.83%
Enquirer	24.35%
Intender	0.41%
Pledger	1.26%
TOTAL	100%

OUTCOME BY TEST

VALUES AND NEEDS

When the need to preserve a value is considered "very important" by supporters, they should be more inclined to consider a legacy even when they have no information about what others have done in the past.

- **Thinking about what first inspired you to become a Charity X supporter, how important to you is ensuring that all children have a safe and happy childhood?**

When the need for a charity's work is considered to be "growing" by supporters, they should be more inclined to consider a legacy even when they have no information about what others have done in the past.

- **Looking to the future, do you feel there will be a growing importance or less of an importance placed on Charity X's work protecting children?**

Bystander effect research suggests that if we could establish the effectiveness of the above two scripts, then adding "minority" or "declining" social information could only increase their effectiveness to encourage people to take up the responsibility to meet future and growing needs.

Our logistic regression analysis shows that individuals, who respond that a safe and happy childhood is "very important," behave differently from those who answered any of the following or nothing:

- Fairly important
- Don't know / undecided
- Not very important
- Not at all important

Further multinomial logistic regression analysis shows that when someone said a safe and happy childhood is very important: the probability of them being an enquirer, intender or pledger more than doubles, whilst they are 37 times less likely to give a hard no.

It's interesting to note that pledge responses also differ between those who answered "very important" and those who didn't. Given pledgers have already made their legacy gift and they were simply revealing their gifts during the phone conversation, we consider this finding supportive of our hypothesis that the importance of securing a safe and happy childhood is an important reason why people leave a legacy to this particular charity.

Table 10: Percentage of responses by type per condition

Type of response	Other	Very important
Hard No	60.18%	1.61%
Not interested ever	10.35%	23.82%
Not interested now	8.60%	22.21%
Enquirer	19.57%	48.76%
Intender	0.24%	1.24%
Pledger	1.05%	2.36%
Total	100%	100%

When someone says that the importance of the work is growing, they are statistically more likely to become an enquirer or a pledger; the effect for intender is also marginally significant.

Table 11: Percentage of responses by type per condition

Type of response	Other	Growing Need
Hard No	59.86%	1.16%
Not interested ever	10.77%	22.14%
Not interested now	9.15%	19.82%
Enquirer	18.90%	53.41%
Intender	0.39%	0.51%
Pledger	0.94%	2.96%
Total	100%	100%

Comparing across all testing results thus far, directly asking people about what might be the most important reason why they leave a legacy to a charity, created by far the largest shift in responses. Without controlled comparisons in the same campaign, however, no statistical analysis may be meaningfully conducted to support this observation.

Nevertheless, this pattern is promising. It could be an indication that people first consider the nature and the magnitude of the need their personal legacy will fulfil. Then they will consider what others have done about the same need that they care about. Further laboratory experiments will be needed to empirically test the order in which people use to consider different factors when making a personally meaningful legacy decision. For now, we test whether the consideration of values and needs have an additive effect on legacy decision making.

TEST 5

OUTCOME

The overall results of the campaign are given below. There are seven types of responses. Hard no-contact refusal, Hard no and Soft are considered as a NO response. The other four are considered as a YES response.

Table 12: Overall number and percentage of responses in the campaign

Type of Responses	Percent of Responses
Hard no - contact refusal	38.86%
Hard no	1.67%
Soft no	29.99%
Considerer	5.52%
Considerer with information	20.94%
Intender	0.58%
Pledger	2.44%
TOTAL	100%

OUTCOME BY TEST

This test is designed to evaluate whether both values and growing needs are necessary, in order to support meaningful legacy decision making. That is when "value importance" and "growing needs" are used in the same conversation, is there any additive effect? One of the objectives this research aims to achieve is to design telephone communications that are as efficient as possible. That is if it can support meaningful decision making with three questions, we would not want to waste supporters' time by asking them four. By asking all participants the "value" question and only half of them the "more/less need" question, we will be able to see if it is necessary to ask the "more/less need" question when value is already primed.

- **Charity X places justice, compassion and love at the heart of everything we do, and these are values that many of our supporters firmly believe in. Thinking about what inspired you to become a long-term Charity X supporter, which of these values do you feel are most important?**

- **Looking into the next 70 years, do you think there will be more or less of a need for Charity X to end poverty?**

Future tests may be conducted to ask all participants the "more/less need" question, and only half of them the value question to see if scripts may be shortened further.

The more/less need version of the test shows a statistically significant increase in the proportion of people saying they will consider a legacy and requesting information, even when gender is controlled for.

Further analysis shows a marginally significant uplift in consideration and intention when someone responds there will be more of a need. Running a further test with a larger volume in the future would add weight to these results.

Table 13: Percentage of responses by type per condition

Type of Responses	Values + need	Values
Hard no - contact refusal	38.35%	39.36%
Hard no	2.06%	1.28%
Soft no	28.19%	31.79%
Considerer	5.92%	5.13%
Considerer + info	22.65%	19.23%
Intender	0.64%	0.51%
Pledger	2.19%	2.69%
TOTAL	100%	100%

This result suggests that when the value question is asked of all respondents, the need question may further contribute to participants' legacy decision making. It is hence sensible to add the question into the script. It is not only sensible because donors might be more inclined to consider leaving a legacy. More importantly, if the consideration about the growing need to reduce poverty is an important part of one's legacy decision making process, it is only sensible for such consideration to be brought up during communication about legacy decisions. This, we think, may help supporters to make a more meaningful and informed legacy decision.

TEST 6

OUTCOME

The overall results of the campaign are given below:

Type of Responses	Percent of Responses
Hard no	61.42%
Soft no	14.54%
Considering a legacy	18.47%
Intender	1.86%
Pledger	3.72%
TOTAL	100%

OUTCOME BY TEST

Unfortunately, the sample size is too small for us to see a statistically significant difference between the two tests. Running a further test with a larger volume in the future would assist further evaluation of this particular test.

Type of Responses	Past Need	Future Need
Hard No	45.90%	45.93%
Not Interested Ever	25.35%	25.13%
Not Interested Now	11.44%	10.23%
Considerer	13.91%	13.69%
Intender	1.08%	1.73%
Pledger	2.00%	3.00%

As a result, no further analysis was possible on the conditions outlined below.

- **Do you mind if I ask whether you know anyone who you think might have benefited in the past from the work we do at Charity X?**

- **Do you mind if I ask whether you know anyone who you think might benefit in the future from the work we do at Charity X**

FINAL RECOMMENDATIONS

We recommend that Listen continues using the effective, meaningful and positive scripts that we have tested in this research. A summary of the test conditions are provided in Appendix 1.

Our research next year will improve upon these findings by identifying more effective, efficient, meaningful and positive ways to support legacy decision during telephone communications.

FINAL RECOMMENDATIONS

STEP ONE	**EFFECTIVE**	**WILL AID ASK (WHAT DID PEOPLE DO IN THE PAST ABOUT THE WILL AID SCHEME?)** *1/3 of our most loyal supporters haven't made a will. Many of them are taking advantage of the Will Aid scheme*
STEP TWO	**EFFECTIVE**	**LEGACY ASK (HOW DID OTHERS' ACTION CHANGE IN THE PAST?)** *Using others' past behaviour as an indicator of growing future needs.* *But in recent years, we have seen a drop in the number of legacies we are receiving. That's why we feel it's so important to learn what our supporters think about them.*
	EFFECTIVE + MEANINGFUL	**TESTING DIRECTLY THE GROWING NEED** *Which is why Charity X need to keep evolving. Looking to the future, do you feel there will be a growing importance or less of an importance placed on Charity X's work protecting children?* *A growing importance / need*
	EFFECTIVE + MEANINGFUL	**LEGACY ASK (IMPORTANCE OF CHARITY VALUES)** *Thinking about what first inspired you to become a Charity X supporter, how important to you is ensuring that all children have a safe and happy childhood?* *A growing need*
STEP THREE	**EFFECTIVE + POSITIVE**	**BOOKLET REQUESTS (WHAT DID PEOPLE THINK ABOUT THE BOOKLET?)** *Many of the supporters we've sent the information pack to have found it very helpful. Can I send you one too?*

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APPENDIX 1: TEST CONDITIONS

TEST CONDITIONS	CONTROL	TEST VERSION ONE	TEST VERSION TWO
TEST ONE	-	1/3 of our most loyal supporters haven't made a will. Many of them are taking advantage of the WillAid Scheme. That's why equity and justice are such important values for us. Can you tell me how important these values are for you personally? • Very important • Fairly Important • Important • Not very important • Not at all important	2/3 of our most loyal supporter have made a will. Many of them took advantage of the Will Aid scheme. That's why equity and justice are such important values for us. Can you tell me how important these values are for you personally? • Very important • Fairly Important • Important • Not very important • Not at all important
TEST TWO	-	But in recent years, we have seen a drop in the number of legacies we are receiving. That's why we feel it's so important to learn what our supporters think about them.	Recently, we have seen an increase in the number of our supporters enquiring about gifts in Wills. That's why we feel it's so important to learn what our supporters think about them. Many of our supporters that we've sent one to have found it very helpful.
TEST THREE	Can you tell me what inspired you to support the Charity X?	We know that people have many different reasons for supporting Charity X. Can you recall the moment when you were inspired to become a Charity X supporter? Many of the supporters we've sent the information pack to have found it very helpful. Can I send you one too?	We know that people have many warm feelings about becoming a Charity X supporter, can you tell me what inspired you to support Charity X? Many of the supporters we've sent the information pack to have found it very helpful. Can I send you one too?

TEST CONDITIONS	CONTROL	TEST VERSION ONE	TEST VERSION TWO
TEST FOUR	...and we must ensure we are able to deal with whatever challenges children face, not only today but for future generations. To help us achieve this, more and more of our supporters have kindly left us a gift in their Will. These gifts are so important to us as they provide a sixth of our voluntary income each year. We completely respect that it's a decision that you'll make in your own time, but is leaving a gift in your Will to Charity X something you've ever considered before?	But regardless, many supporters feel a strong connection with Charity X through their commitment that all children deserve a safe and happy childhood. Thinking about what first inspired you to become a Charity X supporter, how important to you is ensuring that all children have a safe and happy childhood? • Very important • Fairly important • Don't know / undecided • Not very important • Not at all important It's clear we must ensure we are best placed to deal with whatever challenges children face, not only today but for future generations. To help us achieve this, more and more of our supporters have kindly left us a gift in their Will. These gifts are so important to us as they provide a sixth of our voluntary income each year. We completely respect that it's a decision that you'll make in your own time, but is leaving a gift in your Will to the Charity X something you've ever considered before?	Which is why the Charity X need to keep evolving. Looking to the future, do you feel there will be a growing importance or less of a importance placed on Charity X's work protecting children? • a growing need • less of a need • not sure/don't know • Other: free text It's clear we must ensure we are best placed to deal with whatever challenges children face, not only today but for future generations. To help us achieve this, more and more of our supporters have kindly left us a gift in their Will. These gifts are so important to us as they provide a sixth of our voluntary income each year. We completely respect that it's a decision that you'll make in your own time, but is leaving a gift in your Will to Charity X something you've ever considered before?

APPENDIX 1: TEST CONDITIONS

TEST CONDITIONS	CONTROL	TEST VERSION ONE	TEST VERSION TWO
TEST FIVE	-	Charity X places justice, compassion and love at the heart of everything we do, and these are values that many of our supporters firmly believe in. Thinking about what inspired you to become a long-term Charity X supporter, which of these values do you feel are most important? • justice • compassion • love • none • all Looking into the next 70 years, do you think there will be more or less of a need for Charity X to end poverty? • more • less • don't know	Charity X places justice, compassion and love at the heart of everything we do, and these are values that many of our supporters firmly believe in. Thinking about what inspired you to become a long-term Charity X supporter, which of these values do you feel are most important? • justice • compassion • love • none • all
TEST SIX	-	This (disease / condition) touches so many people, but we are dedicated to continue our research into better ways to understand, diagnose and treat (disease/ condition). Do you mind if I ask whether you know anyone who you think might have benefited in the past from the work we do at Charity X? If yes: Would you mind if I ask what relationship they were to you? Prompt: Were they friends or a family member?	This (disease/ condition) touches so many people, but we are dedicated to continue our research into better ways to understand, diagnose and treat (disease/condition). Do you mind if I ask whether you know anyone who you think might benefit in the future from the work we do at Charity X? If yes: Would you mind if I ask what relationship they were to you? Prompt: Were they friends or a family member?

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