From research to practice: implementing academic research on donor motivation to help fundraisers improve relationships with donors

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Introduction

How can fundraisers build stronger relationships with their donors? We argue that by better understanding why a donor chooses to make a donation, and why a donor donates to a specific charity, the quality of the relationship between donors and charities could be greatly improved. A current trend in marketing is hyper-personalisation: creating a personalized offer for each customer. Technological developments such as Big Data and new customer management software make it possible to target each customer with a unique offering. The advantages are clear: more loyal and satisfied customers. Fundraisers can also use hyper-personalisation in their communication with donors, and with that create fundraising requests uniquely fitting with a donor's interests and needs. However, in order to use hyper-personalisation tools, fundraisers will need to understand what motivates donors to give to their cause. Currently, most charities have very limited information about their donors. They typically have transactional information about past donations to their own cause, and some aggregated sociodemographic data at the postal code level, such as average age, wealth, home ownership, and number of children. They often do not know why a donor chooses to donate to their charity, what motivates them to give, and what a donor gives to other charities. In addition, charities often do not have basic donor characteristics on record that assess a donor's likelihood of and resources for giving.

In this whitepaper we develop a supporter survey, which measures relevant donor motivations and characteristics. The results of this survey will enable charities to move to hyper-personalised solicitation requests. It is our firm believe that fundraisers can establish a meaningful and long-term relationship with each donor by focussing on the donor's motivation to give to their cause. In addition, the information about past donation behavior and donor characteristics will enable fundraisers to more successfully stratify and approach their donor base.

We propose to design a questionnaire consisting of four modules, measuring:

1. The relationship between a donor and a specific charitable cause
2. General donor motivation
3. Past donation behavior
4. Relevant donor characteristics

1. The relationship between a donor and a specific charitable cause

In this module the quality and nature of the existing relationship between the donor and the charitable organisation is surveyed. These questions need to be adjusted for a specific charity. This information will help a charity to understand why the donor is specifically interested in their cause, understand the shared values between the donor and the cause, understand which projects and geographical areas the donor is most interested in, and how loyal the donor is to the organisation. Example questions ask about the donor's own motivation for giving to the cause, her link with the cause, and the projects that the donor finds most interesting to support.

2. General donor motivation
There is an abundance of literature studying why people make donations (see for example Bekkers and Wiepking, 2011; Konrath and Handy, 2017). Donors can for example give out of altruistic motivations, to act in line with their personal values, to increase their social reputation, to name a few motivations. Building on the existing donor motivation literature, we propose to (further) develop a scale that measures general donor motivation. Starting point is the new 'Motives to Donate'-scale developed by Konrath and Handy (2017), supplemented with relevant motives from the existing donor motivation literature (Adloff 2016; Barman 2017; Bekkers and Wiepking 2011b; Havens, O'Herlihy, and Schervish 2006; Konrath and Handy 2017; Lindahl and Conley 2002; Sargeant 1999; Sargeant and Woodliffe 2007; Schervish and Havens 1997). In the future, this scale will be further developed based on the outcomes of quantitative tests and qualitative interviews with donors. The initial set of questions developed to measure general donor motivation will be discussed later in this whitepaper.

3. Past donation behavior
Using questions adjusted from the Giving in the Netherlands Panel Study (Bekkers, Boonstoppel, and de Wit 2017), based on a 'method+area'-module (see for example Rooney, Steinberg, and Schervish 2001), we ask about past donor behavior. This is relevant for fundraisers as it will help to understand the different methods with which their donors currently give, and to what other types of causes their donors give, and how generously. This will also enable an organization to estimate the relative size of the donation to their cause, compared to a donors' other giving. This can for example help to identify the organizations most loyal donors, who may be asked to become ambassadors for the organization. Example questions include asking about the methods with which donors give and the amounts they give to different charitable subsectors.

4. Relevant donor characteristics
Some people have more human and social resources for giving than others (Barman 2017; Bekkers and Wiepking 2011a; Wiepking and Bekkers 2012). By taking these differences into account, fundraisers can more successfully target those donors that are more likely to respond positively to a solicitation request. In addition, by understanding how donors with different socio-economic profiles differ in motivations for giving, we can make predictions about motives for giving for larger groups of donors, also those who have not responded to a supporter survey. Most of these questions have also been adopted from the Giving in the Netherlands Panel Study (Bekkers et al. 2017), and ask for example about donor's age, home ownership, educational level and the presence of (grand)children.

Fundraisers can administer these four modules to their donors online or in a postal survey, and easily and cost effectively understand more about their donors' motivations and behavior. They can use this information in their future communication with the donor. Making a meaningful connection, increasing the quality of the relationship and hopefully establish long-term, mutual satisfactory relationships.

As this whitepaper is primarily about understanding donor motivation using a supporter survey, we will discuss section 2 "General donor motivation" of the questionnaire in detail, as well as the results from a first test of this donor motivation study in the remainder of this whitepaper. For more information about sections 1, 3 and 4 of the proposed questionnaire, you can contact Pieter Burgman at Mindwize (pieter.burgman@mindwize.nl).

Motivations for giving

In the academic literature on donor motivation for giving, a substantial number of motivations have been distinguished (see for example Adloff 2016; Barman 2017; Bekkers and Wiepking 2011b; Havens et al. 2006; Lindahl and Conley 2002; Sargeant 1999; Sargeant and Woodliffe 2007; Schervish and Havens 1997). Very timely, Konrath and Handy (2017) have recently published a paper in which they study a large range of donor motivations from the existing literature, and develop the “Motives to Donate”-scale. This scale captures the donor motives identified in past literature that can be considered the most important for motives for giving. Their “Motives to Donate”-scale includes measures for the following six motivations:

1. Trust
2. Altruistic
3. Social
4. Tax
5. Egoism
6. Constraint

As Konrath and Handy (2017) remark, the scale does “not directly assess all possible donor motives […]. For example, in the United States, the most common recipients of charitable donations are religious organizations (List, 2011). The current version of the scale did not directly ask people whether they gave for religious reasons.” (Konrath and Handy 2017: p.23-24). And “Another motive that was not directly assessed in the current article is reciprocity or gratitude”. (Konrath and Handy 2017: p.24). After a new survey of the literature, and discussion with donor motivation researchers, we came up with the following additional motivations to include in an attempt to develop a extensive measure of donor motivation:

7. Religion
8. Giving back
9. Injustice
10. Tangible reward
11. Joy
12. Perceived efficacy
13. Emotion-reason

We will now describe the thirteen motivations and show how they can be measured in a supporter survey. The question preceding the items is:

The statements below are reasons that people may or may not want to donate money to charitable organizations. Using the scale below, please indicate how much you agree or disagree with each of these statements in terms of how much it applies to you personally. Please answer these questions whether or not you actually donate to charities. 1= *Strongly disagree*, 2= *Moderately disagree*, 3= *Neither agree nor disagree*, 4= *Moderately agree*, 5= *Strongly agree* (Konrath and Handy 2017: p. 13).

In case a supporter survey does not allow for the inclusion of three items for each motive, we make suggestions for so-called “single-item alternatives” or “Single measure alternatives”, where the inclusion of one item or measure functions as a proxy to measure the motive. It is important to understand that the validity of the measures is higher when all three items are included in the supporter survey.

1. Trust

When people trust that a charity will spend their money well, and to their best of their ability, they are more inclined to give and give higher amounts (Bekkers 2003; Bekkers and Wiepking 2011b; Konrath and Handy 2017). This is especially the case for organizations that aim to solve complex problems, work under difficult conditions, under greater uncertainties or far away, such as for example international (emergency) relief organizations (Wiepking 2010).

> **Many charitable organizations are dishonest (R – stands for reversed)**
> Much of the money donated to charities is wasted (R)
> My image of charitable organizations is positive
> **(Items in bold are suggested single item alternatives)**
> (source: Konrath and Handy 2017)
>
> *Single measure alternative:*
> On a scale from 0 to 10, how much trust do you have in [country] charities in general? 0 indicates no trust at all, and 10 indicates full trust.
> [0-10]
> (source: Bekkers et al. 2017)

2. Altruistic

People with stronger altruistic values are more likely to give and give higher amounts (Konrath and Handy 2017; Ribar and Wilhelm 2002). Altruistic values relate to the extend with which people care about others and want to help those who are less fortunate.

> **I donate because I feel compassion toward people in need**
> People should be willing to help others who are less fortunate
> I give because I am concerned about those less fortunate than myself
> (source: Konrath and Handy 2017)

3. Social

People may receive social rewards for giving, or even experience social pressure to make donations (Bekkers and Wiepking 2011b; Konrath and Handy 2017). Typically making donations is perceived by others as a positive action. By publicly giving, people signal to other people that they are a *prosocial* person, someone who cares about others, and contribute to the wellbeing of others.

> **Others with whom I am close place a high value on donating to charities**
> People I know share an interest in financially supporting charitable organizations
> My friends donate to charities
> (source: Konrath and Handy 2017)

4. Tax benefits

When the absolute costs for giving are lower, people are more inclined to give and give higher amounts. By claiming tax benefits, donors can lower the costs of their donations (Konrath and Handy 2017; Peloza and Steel 2005).

I donate because I receive a tax credit for charitable contributions
Donating to charity helps me save on my income taxes
Giving money to charities enables me to reduce my income taxes
(source: Konrath and Handy 2017)

Single measure alternative:
Did you deduct your charitable donations from your income tax in [previous calendar/tax year]?
- Yes
- No

5. Egoism

People can make donations to primarily benefit themselves, rather than the beneficiaries of their donation. When people give to feel good about themselves, because they want to feel powerful, recognized or needed, they give out of egoistic motivations (Konrath and Handy 2017). Egoism stands in contrast to altruism (not to be confused with altruistic values). Altruism is also commonly identified in the donor motivation literature and means that people primarily give to benefit the beneficiaries or create the public good intended with their gift, and not to experience private benefits (Andreoni 2006; Bekkers and Wiepking 2011b).

Giving to charities makes me feel powerful
Contributing money to charities enables me to obtain recognition
I donate money to charities because it makes me feel needed
(source: Konrath and Handy 2017)

6. Constraint

People need money in order to be able to give money to charities. When people face financial constraints, they are less likely to give and give lower amounts (Konrath and Handy 2017). It is interesting that not only the absolute amount of income and wealth is related to giving, but also the perception that people hold towards their financial situation. People who feel more financially secure, are more likely to give and give more than those who feel less financially secure, even though they may have access to a substantial amount of income and wealth (Wiepking and Breeze 2012).

Donating money to charities would interfere with me meeting my own financial obligations
Donating money to charities provides too much of a financial strain on me
Even if I wanted to donate money to charities, I could not financially afford it
(source: Konrath and Handy 2017)

Single measure alternative:
On a scale from 0 to 10, how financially secure do you feel? 0 stands for financially very insecure, and 10 stands for financially very secure. [0-10]
(source: Bekkers et al. 2017)

7. Religious values

Across all world's religions, caring for others is one of the key values. People who hold stronger religious values are more likely to give and give higher amounts to charities (Bekkers and Schuyt 2008), although there are some nuances. Religious individuals are for example more likely to give to people belonging to their own religious denomination (Galen 2012).

> **I donate to charities because of my religious beliefs**
> My religion is an important driver for my charitable behaviour
> I find it important to donate to charities because of my religious values
> (developed for study)

8. Giving back

People feel thankful for what they have and want to give back. One way of giving back is through their giving. Especially those who have substantial financial means may feel it is their duty to support others who have been less fortunate (Breeze and Lloyd 2013). This is sometimes referred to as *noblesse oblige* (Ostrander 1980).

> **I want to give something back by supporting charities**
> I give to charities because I have so much in my life to be thankful for
> Because I feel grateful for so many things, I give to charity
> (developed for study)

9. Injustice

People may also donate out of anger and frustration at injustice, and give to change the situation they feel is unjust.

> **I give to decrease the injustice in this world**
> (this motivation is still in development)

10. Tangible reward

Some people are motivated to give, because they receive a tangible award in exchange for their donation (Bekkers and Wiepking 2011b). This can be participation in a lottery (Landry et al. 2006) or something small, such as a pen included with a direct mail letter or a calendar in a door-to-door fundraiser, or something more substantial, such as a an exclusive opportunity to attend a music rehearsal at the opera in exchange for a yearly gift (Buraschi and Cornelli 2014).

> **I like to receive a present when I make a donation to a charitable organisation**
> I rather buy a product from a charitable organisation then donating money
> I rather give money to charities, then play in a charitable lottery (R)
> (developed for study)

11. Joy

Giving may make people happier (Dunn, Aknin, and Norton 2008; Konrath 2016), which could motivate their giving. Neuropsychological studies have shown that the areas in our brain that are active when we make donations, are related to reward processing (Cutler and Campbell-Meiklejohn 2018). However, there are also studies who do not support this relationship (Bekkers et al. 2018; Berman and Small 2012). In other words, people may feel happier or better when they give, but it may depend on the conditions under which they display giving behavior.

> **Giving to charities makes me feel happier**

Giving to charities gives me a better feeling then buying something for myself
Giving to charities gives me a positive feeling
(source: Bekkers et al. 2017)

12. Perceived efficacy

Some people care more than others about their individual contribution to the charity, and consequently about their role in helping the beneficiaries or realizing the public good. Those people are more likely to give and give more when the perceived efficacy of their donation is larger (Bekkers and Wiepking 2011b). Perceived efficacy of donations can be influenced by leadership gifts or by (manipulated) low overhead ratio's (Gneezy, Keenan, and Gneezy 2014), suggesting that the donor's gift has a direct impact on the beneficiaries and is not used for overhead related costs such as staff, training and housing of the charity.

When I give money to charitable organisations, I find it important that 100% of my donation goes to the beneficiaries and will not be used for overhead
I don't mind when part of my donation goes towards overhead of the charitable organisation, such as personnel and housing (R)
I only give to charities without overhead costs
(developed for study)

Single measure alternative (measuring overhead aversion, knowledge about charities and preferences for personal effectiveness):
Charities spend money on approximately three things:
1. Projects (everything that benefits the cause and/or the beneficiaries)
2. Fundraising (for example, letters, advertorials, commercials)
3. Personnel and organisation (for example, salaries and office rent)

A. What percentage do you think that charities **spend in reality** on these three costs?
B. What percentage do you think charities **should be spending** on these three costs?

	A. % that they spend in reality	**B. % that they should be spending**
Projects		
Fundraising		
Personnel and organization		
	100%	**100%**

(Source: WWAV 2007)

13. Emotion-reason

Some people, and these are typically smaller donors, give to charities because they experience an emotional reaction, often in response to communication from a charitable organization. Others are more rational in their giving and make deliberate donation decisions (Kahneman 2003; Karlan and Wood 2017).

When I give to charities, I give with my heart rather than my head
I typically give to charities out of an emotional response
I always think carefully before donating to charities
(developed for study)

Results from a pilot test

In April 2018, Mindwize conducted a pilot test in which 7,954 donors from a mid-sized charitable organization received a postal donor supporter survey. The charity focusses on creating a healthy environment (clean water, sanitation, hygiene) in developing economies. The yearly revenue of the charity was about 17 million euro in 2016. It is interesting to note that the charity only started fundraising among the general public in the last five years, before that it was financed by institutional (mostly governmental) funding. Still, individual donations make only up a minority of the revenue, only about 6%.

Not all existing donors received the survey, only the 25% that were considered the 'best' donors. Donors were ranked according to their number of gifts, the amounts donated, their 'donated-to-asked'-ratio and whether they were signed up for a direct debit (all for the past two years). The 25% highest ranking donors were selected to receive the pilot survey. The survey included the four modules as described in this whitepaper (the relationship between a donor and a specific charitable cause; general donor motivation; past donation behaviour; relevant donor characteristics), and some specific questions about legacies, the original aim of the survey. Not all items measuring donor motivation have been included in the pilot test, since there was only room for one item or measure for a selection of motivations. Because some of the measures were (and are) still in development and because we learned a lot from this pilot study, we sometimes included different single item alternatives then suggested under the discussion of the motives in this whitepaper.

May 30, 1,395 donors had returned the survey, resulting in a response rate of 17.5%. This is comparable with the response rate of past supporter surveys Mindwize ran for other charitable organizations. This is interesting, since the current survey was two pages (about 10 questions) longer than the supporter surveys Mindwize typically runs.

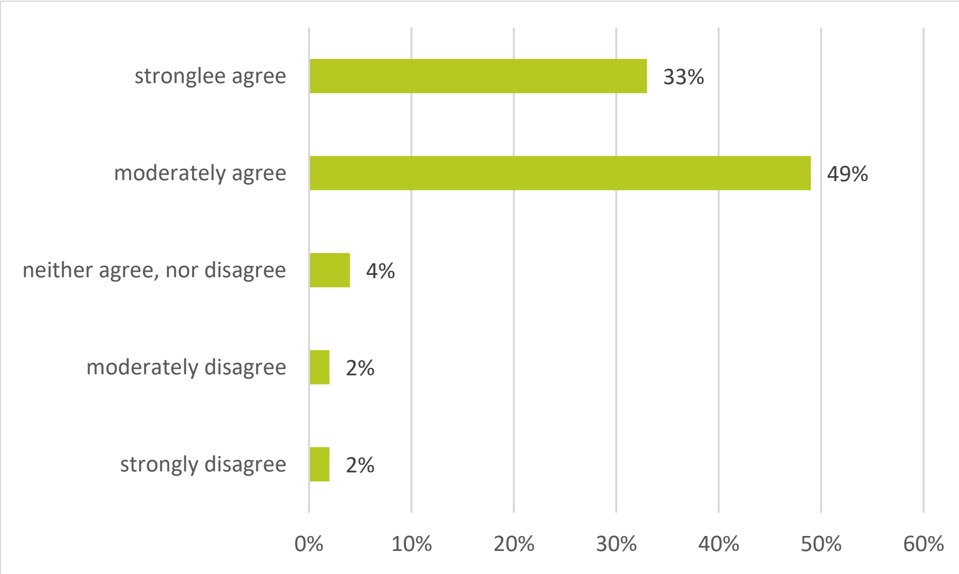
The results from the pilot test showed that the donors who returned the survey were indeed larger donors, which could be expected from the selection criteria. 29% donated more than 2,000 euro to charitable causes in 2017 and 49% donated more than 1000 euro. Compared with the Dutch population, the donors who responded to this survey were more likely to donate to all causes, but especially their higher likelihood of donating to religion (61% vs 28% for the general population) culture (27% vs 12%) and education and research (31% vs 10%) is interesting (De Wit and Bekkers 2017: p. 104). The donors who responded to the survey were on average higher educated (49% completed a tertiary educational level), and older (63% received pension).

Examining the motivations in a pilot study

Due to space restrictions, we could not include all motivations in the pilot study. We included nine out of the thirteen identified motivations: altruistic, egoism, religious values, joy, emotion/reason, tax, constraint, trust, perceived efficacy. Furthermore, the percentages displayed in the graphs may not add up to 100% due to non-responsiveness of some donors on these questions.

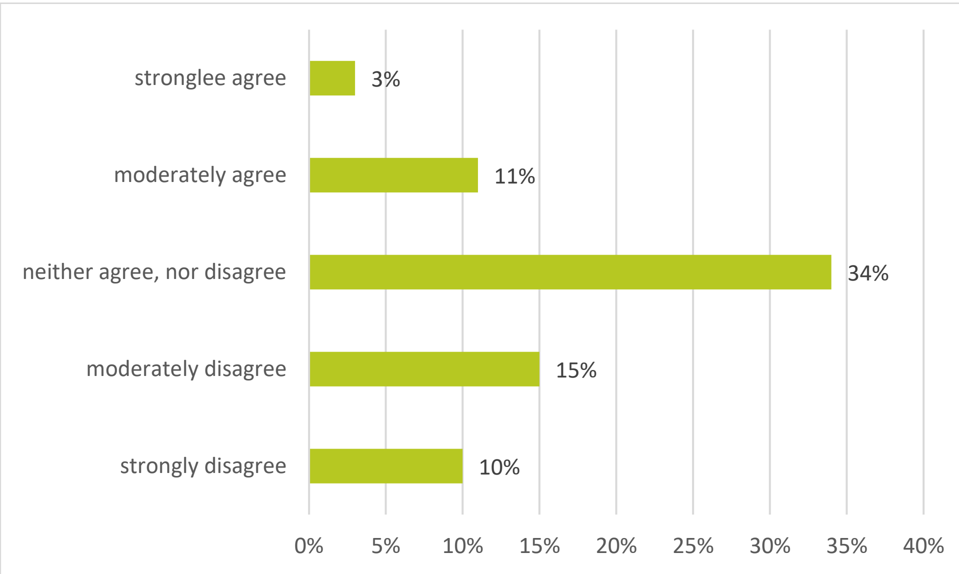
Altruistic

I donate because I feel compassion toward people in need / Ik geef geld aan goede doelen, omdat ik bezorgdheid voel voor mensen die het minder goed hebben dan ik



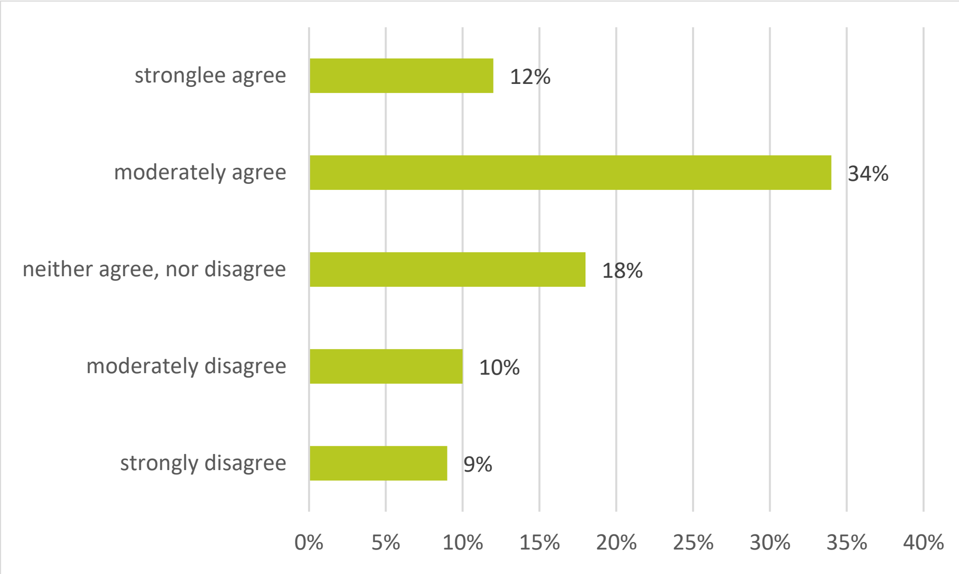
Egoism

I donate money to charities because it makes me feel needed / Ik voel me gewaardeerd wanneer ik geld geef aan goede doelen



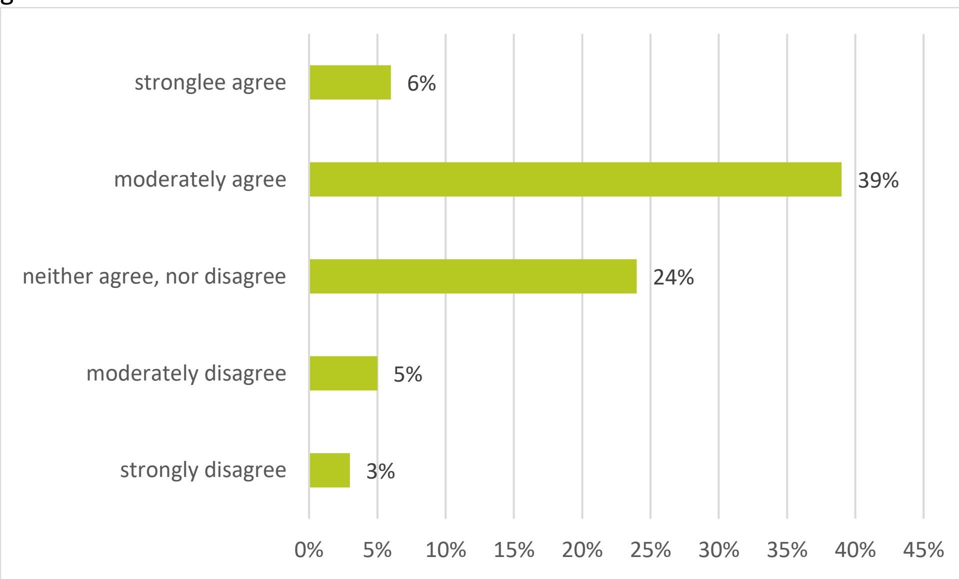
Religious values

I donate to charities because of my religious beliefs / Ik geef aan goede doelen vanuit mijn religieuze overtuiging

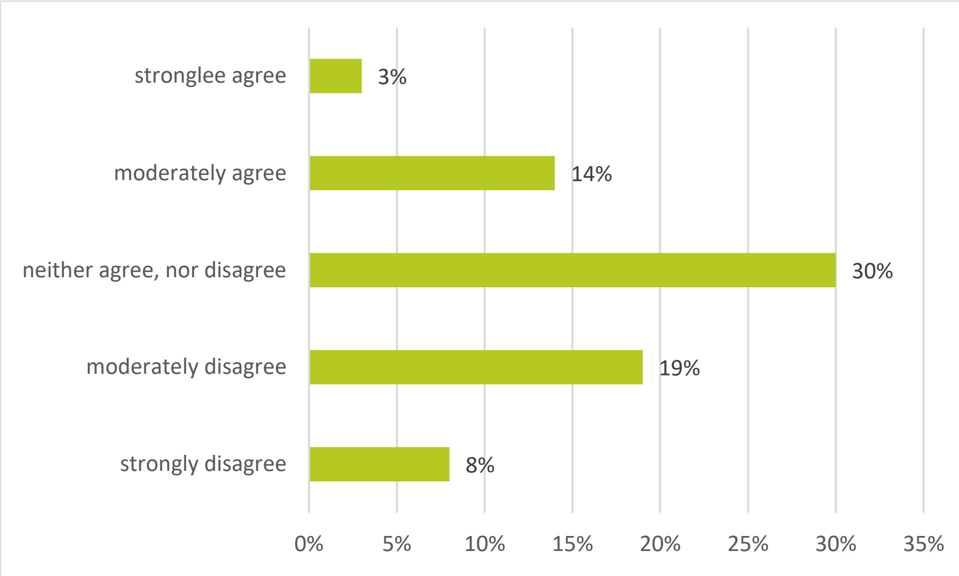


Joy

Giving to charities gives me a positive feeling / Geven aan een goed doel geeft mij een positief gevoel

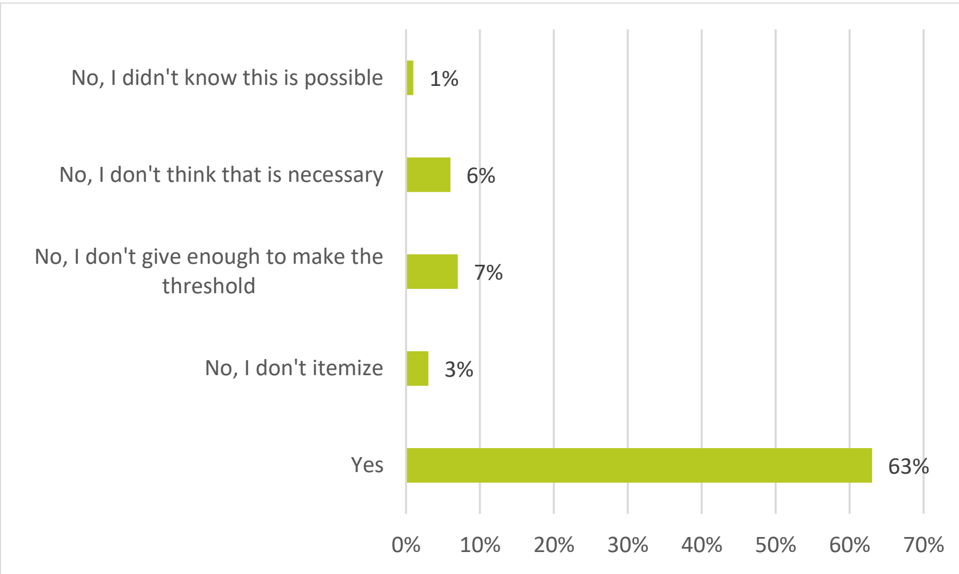


Emotion / reason
I typically give to charities out of an emotional response / I geef voornamelijk vanuit een emotionele reactie aan goede doelen



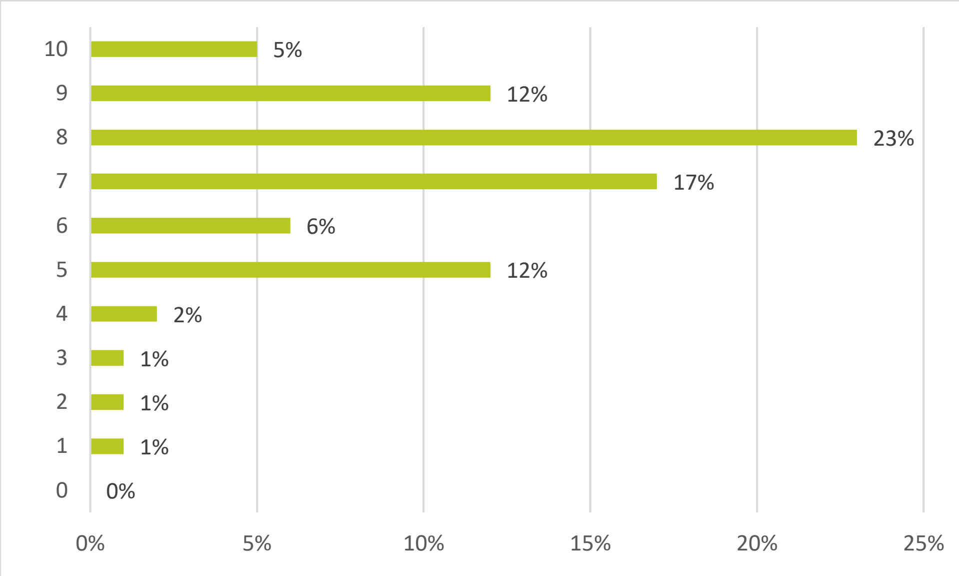
Tax
Did you deduct your charitable donations from your income tax in 2017? / Heeft u (of gaat u) uw giften uit 2017 opgegeven aan de belasting als aftrekpost?

- Nee, ik ken de regeling niet
- Nee, ik vind het niet nodig
- Nee, ik haal de drempel niet
- Nee, ik doe helemaal geen aangifte
- Ja



Constraint

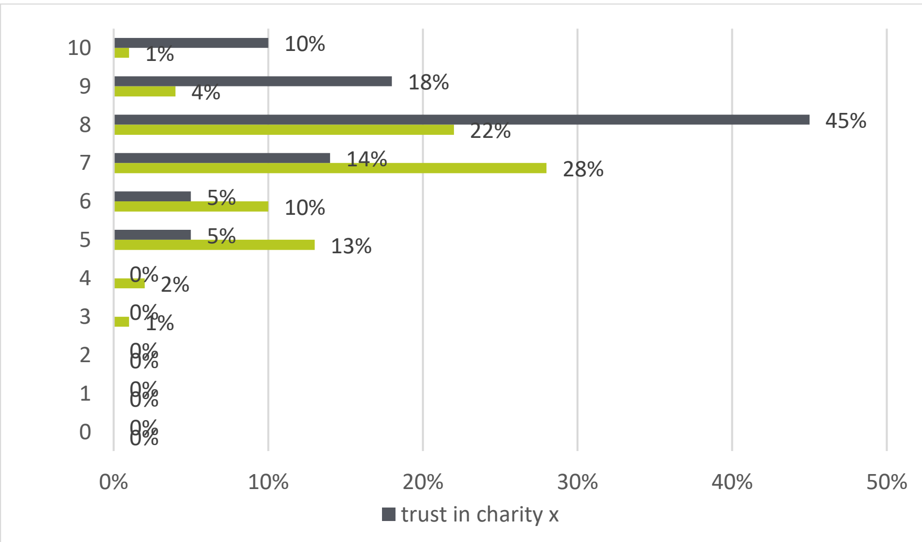
On a scale from 0 to 10, how financially secure do you feel? 0 stands for financially very insecure, and 10 stands for financially very secure / Hoe beoordeelt u uw huidige financiële situatie op een schaal van 0 tot 10? Hierbij is 0 zeer onzeker en 10 zeer zeker.



Studies indicate that financial security may be a better predictor for donor behaviour than the person's actual financial situation (Wiepking and Breeze 2012). This finding was supported in the pilot study: donors who felt more financially secure tended to donate more over the course of a year.

Trust

On a scale from 0 to 10, how much trust do you have in Dutch charities in general | how much trust do you have in [charity x]? 0 indicates no trust at all, and 10 indicates full trust / Op een schaal van 0 tot 10, hoeveel vertrouwen heeft u in het algemeen in goede doelen in Nederland | hoeveel vertrouwen heeft u in [charity x]? Hierbij is 0 helemaal geen vertrouwen en 10 erg veel vertrouwen.



Perceived efficacy

Charities spend money on approximately three things:

1. Projects (everything that benefits the cause and/or the beneficiaries)
2. Fundraising (for example, letters, advertorials, commercials)
3. Personnel and organisation (for example, salaries and office rent)

A. What percentage do you think that charities **spend in reality** on these three costs?
B. What percentage do you think charities **should be spending** on these three costs?

There obviously is a large gap between perceived spending on projects (61%) and the actual spending by this organization (91%). This leads to two assumptions:

1 Perceived spending (that is much lower than actual spending on projects) has little impact on donor loyalty and giving behaviour. If this is the case, the organization can move its focal point in donor communications more towards impact of its projects.

2 Improved awareness of actual spending (efficacy) versus perceived spending may result in stronger donor loyalty and improve giving behavior.

Conclusion

Future research

In a follow-up project, we will test the efficacy of using the information about a donor's motivation, behavior and characteristics in fundraising communication. We will examine whether using information about donor's motivation indeed increases the quality of the relationship between donors and organizations soliciting for funding, and results in more meaningful, long-term relationships. We will also test and validate the multiple and single item and single measure versions of the donor motivations. In addition, we will examine if there are cultural differences between donors in their motivations for giving by testing the donor motivations in multiple countries.

Lessons learned

An important lesson learned from this project, is that it is important to involve all stakeholders from the start, including fundraisers, marketeers, (account) managers, data scientists and anyone else that is involved in the implementation and follow up of the supporter survey. Another relevant issue is that the data infrastructure needs to be able to handle the new detailed level of information gathered about donors, and that this infrastructure needs to be able to generate (hyper)personalized communication for donors, based on their preferences and motives.

It's also important to develop concrete follow-up procedures before sending the survey.
Think of a complaint- or death report procedure but also a procedure to recruit ambassadors among very enthusiastic, loyal donors.

Finally ensure good quality control of the data during (automatic) processing of the surveys.
Nonsense input data produces nonsense information about your donors or 'garbage in is garbage out'.

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