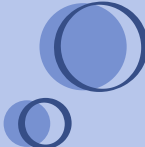



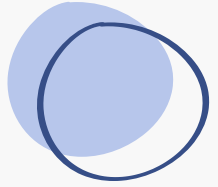


Boost Your Year-End Fundraising: Crack the Code on Donor Psychology



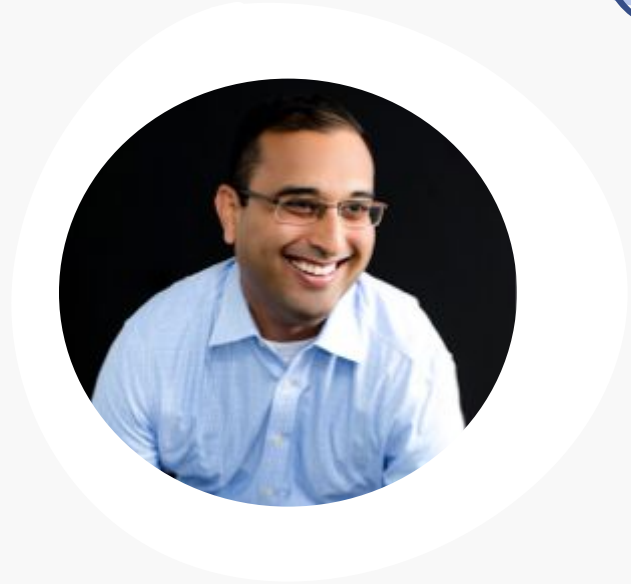
Cherian Koshy CFRE, CAP[®]



About me

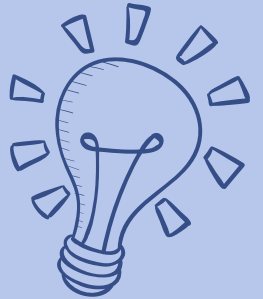


- Certified Fund Raising Executive (CFRE), Chartered Advisor in Philanthropy (CAP) & Association of Fundraising Professionals Master Trainer
- Harvard Business School Behavioral Economics
- Founder of [NonprofitOS](#)



But first...

**Let's get those
neuron's firing!**





Bed

Rest

Awake

Tired

Draem

Wake

Snooze

Blanket

Catnap

Nod off

Shut eye

Sedate

Hit the sack

Corn Dog

Conk Out

Lie Down

Doze

Slumber

Snore

Nap

Siesta

Yawn

Drowsy

Peace



**Take a moment to
remember all the words
you can**





Is bed on your list?

Is dream on your list?

Is corn dog on your list?

Is sleep on your list?

Is snore on your list?





Is bed on your list?

- **Primacy effect**

Is dream on your list?

- **Zeigarnik effect**

Is corn dog on your list?

- **Contrast effect**

Is snore on your list?

- **Spacing effect**

Is sleep on your list?



ck

**No
sleep!**

Bed

Rest

Awake

Tired

Dream

Wake

Snooze

Blanket

Catnap

Nod off

Shut eye

Sedat

Hit the sack

Corn Dog

Conk Out

Lie Down

Doze

Slumber

Snore

Nap

Siesta

Yawn

Drowsy

Peace





ck



**Approximately
HALF of
respondents
engage in
false recall!**



WE ARE NOT RATIONAL!

|| We usually think of ourselves as sitting the driver's seat, with ultimate control over the decisions we made and the direction our life takes; but, alas, this perception has more to do with our desires-with how we want to view ourselves-than with reality.

|| – Duke Professor Dan Ariely



OUR DONORS ARE NOT RATIONAL!

These techniques should not be viewed as an ethical quandary or a form of manipulation. These simple approaches to nudging toward more and smarter donations can help people become aware of the dynamics governing their decision-making and then harness those drivers for good.





“

**People don't think
what they feel.**

**They don't say what
they think.**

**And they don't do
what they say.**

– David Ogilvy

WHAT WE'RE COVERING TODAY

01

UNDERSTANDING
RANDOM ACTS OF
FUNDRAISING

03

OPTIMIZING YEAR-END
GIVING OPPORTUNITIES

02

PREPARING FOR
YEAR-END GIVING
TODAY

04


YOUR QUESTIONS



01

UNDERSTANDING RANDOM ACTS OF FUNDRAISING





Strategy without tactics is the
slowest route to victory.
Tactics without strategy is the
noise before defeat

Sun Tzu



Let data drive decisions, not the Highest Paid Person's Opinion.



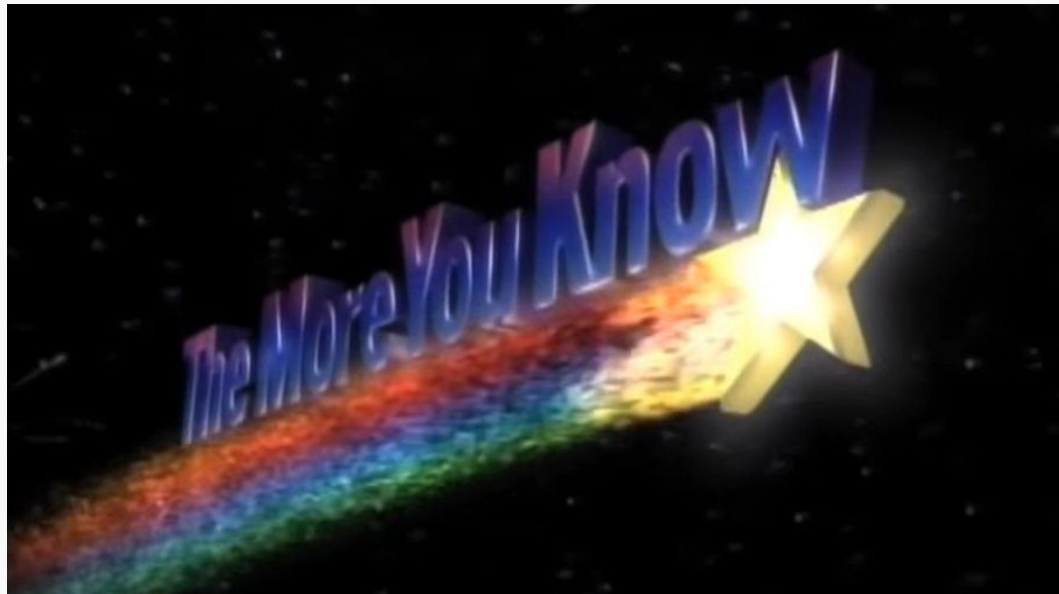
#HowGoogleWorks

HowGoogleWorks.net



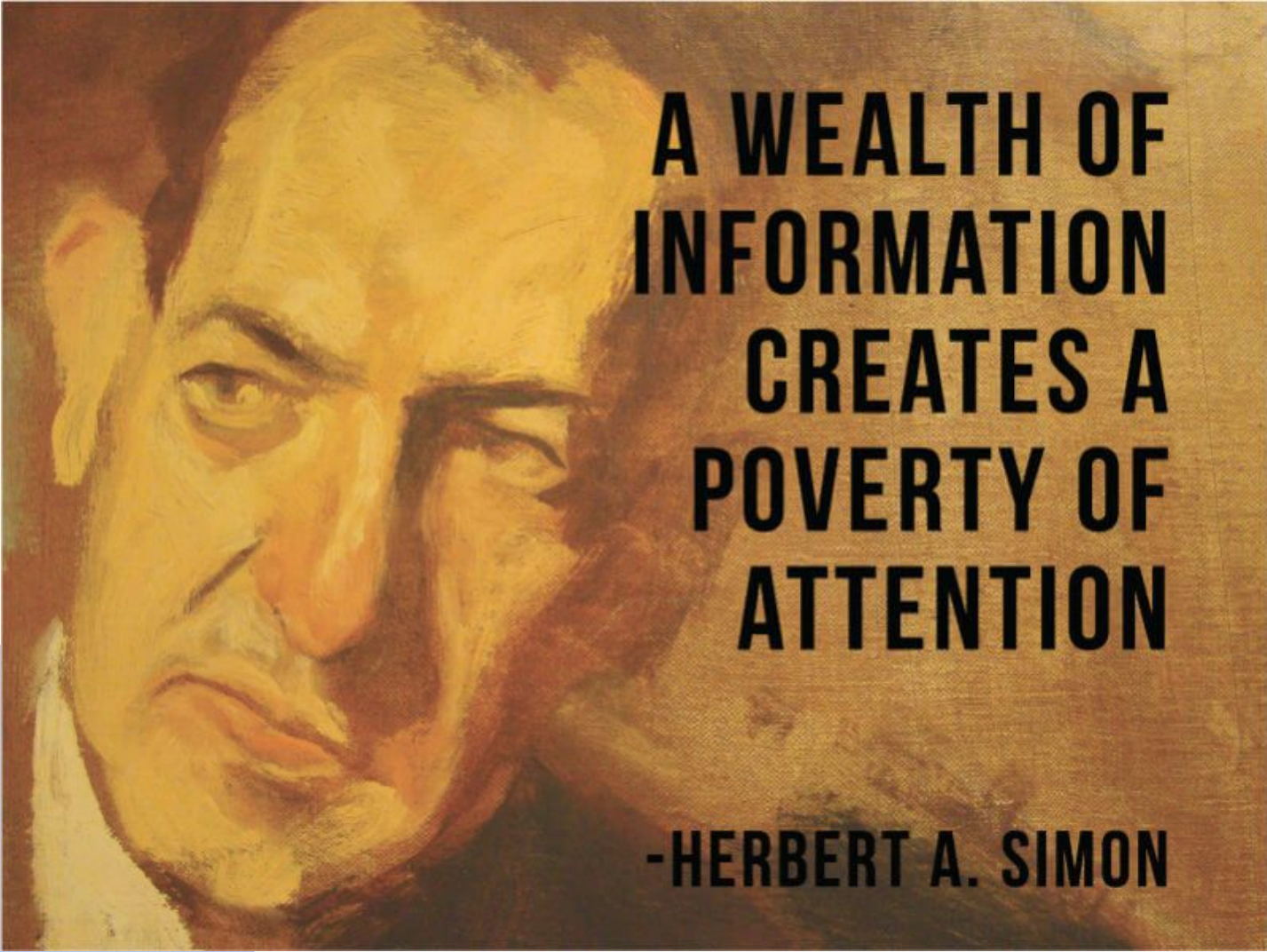
Knowledge is power

“Simply presenting more information to people may not have the intended effects, particularly when they must combine this information with their existing knowledge and beliefs.”



Min Zheng, Jessecae K. Marsh, Jeffrey V. Nickerson, Samantha Kleinberg. How causal information affects decisions. *Cognitive Research: Principles and Implications*, 2020; 5 (1) DOI: [10.1186/s41235-020-0206-z](https://doi.org/10.1186/s41235-020-0206-z)





**A WEALTH OF
INFORMATION
CREATES A
POVERTY OF
ATTENTION**

-HERBERT A. SIMON



People know what motivates them



<https://www.oxfordhandbooks.com/view/10.1093/oxfordhb/9780195399820.001.0001/oxfordhb-9780195399820-e-1>



To reduce interproximal plaque and gingivitis, Listerine® and floss...

Equally effective.*^{1,2}
Every day.

The antimicrobial action of Listerine® is as effective as floss, even in hard-to-reach areas**

Percent Reduction*	Bristling & Listerine® vs. Flossing	Bristling & Flossing
Interproximal Plaque Buildup (up to)	27.5% ¹	3.4%
Interproximal Gingivitis (up to)	11.1% ¹	8.3% ¹

*Based on data on the clinical study comparing the efficacy of oral products when compared to a control group.
**Based on data on the clinical study comparing the efficacy of Listerine and flossing in up to 20% of interdental spaces.
†Based on data on the clinical study comparing the efficacy of Listerine and flossing in up to 20% of interdental spaces.
‡Based on data on the clinical study comparing the efficacy of Listerine and flossing in up to 20% of interdental spaces.

For more information, visit www.listerine.com

Flow: 2018

Recommend
LISTERINE
ORAL CARE

Pfizer NEW YORK, NY
© 2018 Pfizer Inc. All rights reserved. Listerine, the Listerine logo, and the Listerine design are trademarks of Pfizer Inc. Listerine is a registered trademark of Pfizer Inc. Listerine is a registered trademark of Pfizer Inc. Listerine is a registered trademark of Pfizer Inc. Listerine is a registered trademark of Pfizer Inc. Listerine is a registered trademark of Pfizer Inc.

SYSTEM 2 AD





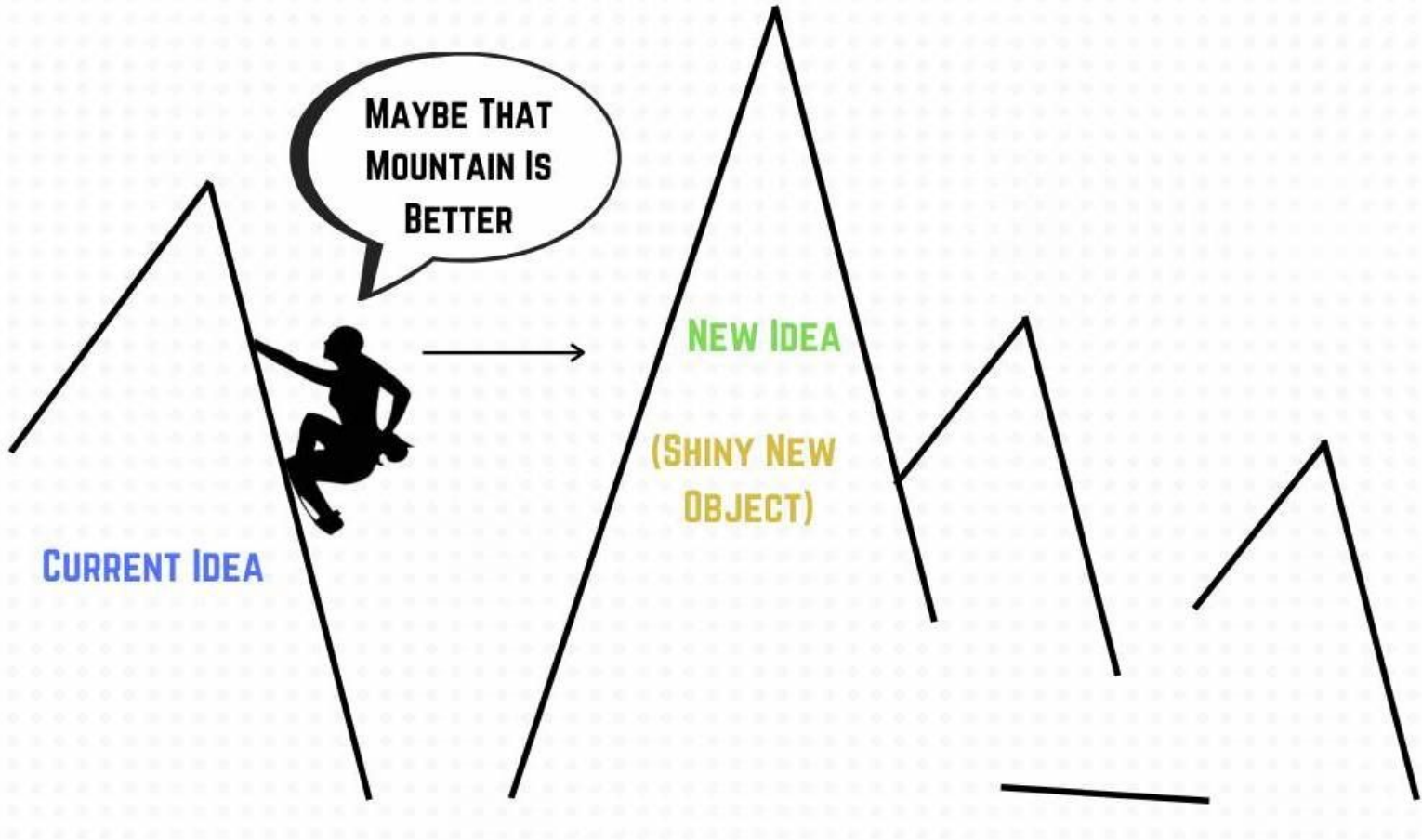
SYSTEM 1 AD





SHINY OBJECT SYNDROME

dk





BE SKEPTICAL







***“We are what we
repeatedly do.
Excellence, then, is
not an act, but a
habit.”***





Three questions:

- ~~1. You have money~~
- ~~2. It's a good cause~~
- ~~3. We're good at it~~
- ~~4. We need money~~



1. **Why give?**
2. **Why give to you?**
3. **Why give now?**



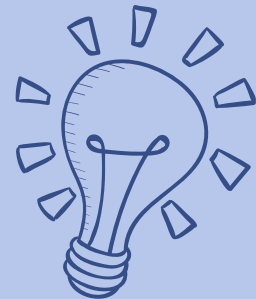
02

PREPARING FOR YEAR-END GIVING TODAY



But first...

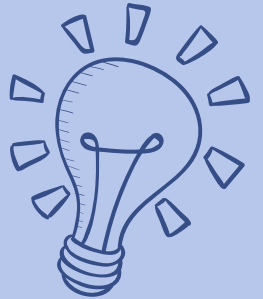
**I'm going to prime
you**



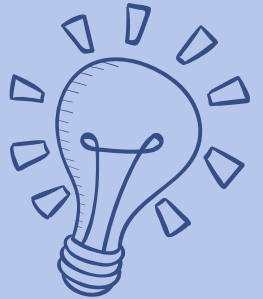


**If your last name
begins with A-L**

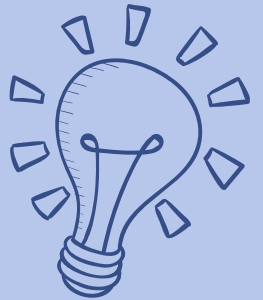
**CLOSE YOUR
EYES**



**Your last name begins
with A-L**

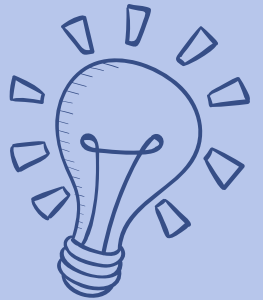


**Is the number of
nonprofit pieces of
direct mail sent to the
average US home each
year more or less than
100?**



Send Your Guess Now

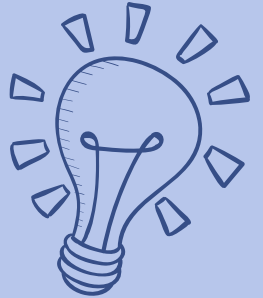
**(# of nonprofit mail pieces
per house per year)**



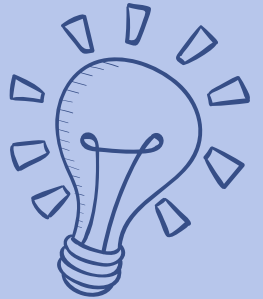


**If your last name
begins with M-Z**

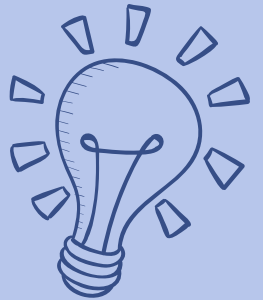
OPEN YOUR EYES



**Your last name begins
with M-Z**



**Is the number of
nonprofit pieces of
direct mail sent to the
average US home each
year more or less than
1,000?**



Send Your Guess Now

**(# of nonprofit mail pieces
per house per year)**





***The Answer is
92 vs 454 marketing
mail pieces per year***

<https://www.smallbizgenius.net/by-the-numbers/direct-mail-statistics/#gref>

“

How do you
create a £500,000
donation envelope?

”



**christian
aid
week**
13-19 MAY

**'IF ANOTHER
HURRICANE
WENT THROUGH,
WE'D JUST DIE.'**

Without you, Marcelin and his family won't survive the next hurricane.

Please give today

WE CREATED AND TESTED 6 PERSUASIVE STRATEGIES AGAINST A CONTROL...



LABOUR ILLUSION

Hand delivered stamp



SCARCITY

Drive urgency



COGNITIVE EASE

Signal it's an appeal



AFFORDANCE CUES

Portrait orientation



SALIENCE

Draw attention to gift aid



COSTLY SIGNALLING

Thicker paper (90gsm -> 150gsm)



17%

Winning Persuasive Strategy



Affordance Cues: When an object's design makes it easy to see how to use it, people are more likely to do so.



TAKING A CLOSE LOOK...



90gsm → 150gsm





If someone hears your message and it reinforces that smart, capable, good belief, they'll likely take the action you recommend so they can continue to feel that way.

Tamsen Webster, Message Strategist (she/her)

@tamadear



Use Social Norms & Donor Identity

Use identity-focused messaging to promote the donor who thoughtfully donates in alignment with the causes she chooses to support.

- *“People like you”*





Your generous support contributes to the amazing **<TOTAL AMT> that <<<<<DAY>>>> season ticket holders** generously provide to preserve and protect the arts in Des Moines. **Your renewed gift is essential to ensure that high-quality programming is accessible and arts education continues to receive the priority it deserves.** Soon, you'll receive information about renewing your Willis Broadway season tickets and you will have the opportunity to easily make a gift and even set up a convenient payment plan. Watch for this in your upcoming mail and thank you for your loyal support and your continued generosity.



Civic Center
221 Walnut Street
Des Moines, IA 50309
515.246.2300
DesMoinesPerformingArts.org

NONPROFIT ORG.
U.S. POSTAGE PAID
DES MOINES, IA
PERMIT NO. 1141

DES MOINES
PERFORMING ARTS
CIVIC CENTER
STONER THEATER
TEMPLE THEATER
COWLES COMMONS





<<<<<DAY>>>>> season ticket holders just like you generously support the arts and arts education! Your fellow <<<<<DAY>>>>> season ticket holders contribute a total of <TOTAL AMT>. That's <AVG GIFT> per ticket holder! **Would you consider joining them in preserving and protecting the arts in Iowa?** Your gift is essential to ensure that high-quality programming is accessible and arts education continues to receive the priority it deserves. Soon, you'll receive information about renewing your Willis Broadway season tickets and you will have the opportunity to join your fellow ticket holders by easily adding a gift and even setting up a convenient payment plan. Watch for this in your upcoming mail and thank you in advance for considering a gift to support the arts.



Civic Center
221 Walnut Street
Des Moines, IA 50309
515.246.2300
DesMoinesPerformingArts.org

NONPROFIT ORG.
U.S. POSTAGE PAID
DES MOINES, IA
PERMIT NO. 1141

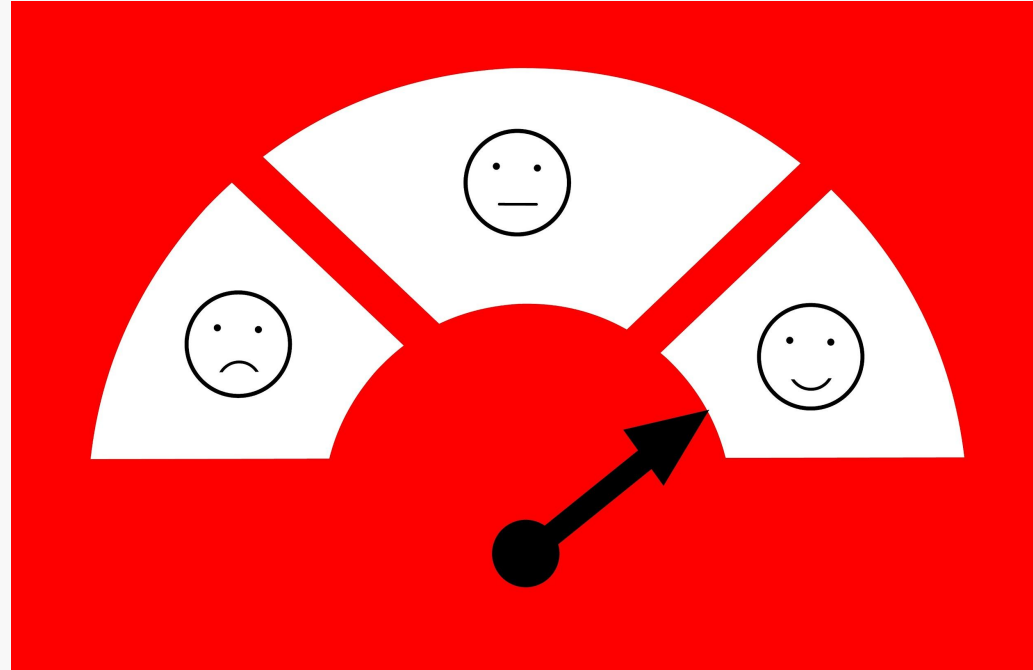
DES MOINES
PERFORMING ARTS
CIVIC CENTER
STONER THEATER
TEMPLE THEATER
COWLES COMMONS



Bring Attention to the Choice

Create space for a donor to actively choose to follow through on our intentions

- *The unique use of donor surveys*



Create a Donor Commitment

- *Make a pledge*
- *Plan for giving in advance*
- *Talk to someone else about their giving plan*
- *Reinforce identity as a donor*





Create a Donor Goal or Plan

Setting a specific goal and making a plan has been shown to increase follow-through.

- *Atomic Habits*
- *Set a 2024 giving goal or a multi-year goal*



Start In September



Send an impact story

Check out [Small Shop Strategies](#) for more info!

- Omni channel, visual, story



Start In September



- ✓ **Send a donor survey**
 - **Use Google Forms**
 - **Why is the cause important to you?**
 - **What's most important?**
 - **Are you considering continuing your loyal support?**
 - **Reformat the responses and send back to ALL!**



Outreach October



Leave a voicemail thanking them for their support

Hi, my name is Cherian and I'm an AFP board member. I'm simply calling today to thank you for your support of the fundraising profession throughout this year. Your gift in support of the AFP Foundation has provided access to education and resources to fundraisers who needed it most. I'm grateful for what you've helped to accomplish and I just wanted you to know how important your loyal support has been.

Thank you!



Outreach October

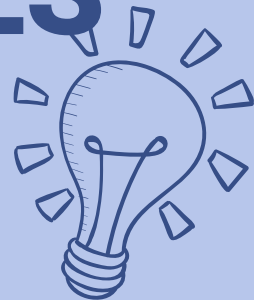


- ✓ **Host an in-person/virtual event for donors**
 - **Get together (no program, no ask)**
 - **Serve food/drinks**
 - **If virtual, make it as interesting as possible but even a facility tour could be useful**



03

OPTIMIZING YEAR-END GIVING OPPORTUNITIES



THE 3 Bs OF DONOR BEHAVIOR

3Bs



BEHAVIOR

The first B stands for **Behavior (duh!)**. We can't solve any problems without identifying the behavior that needs to be changed.



BARRIERS

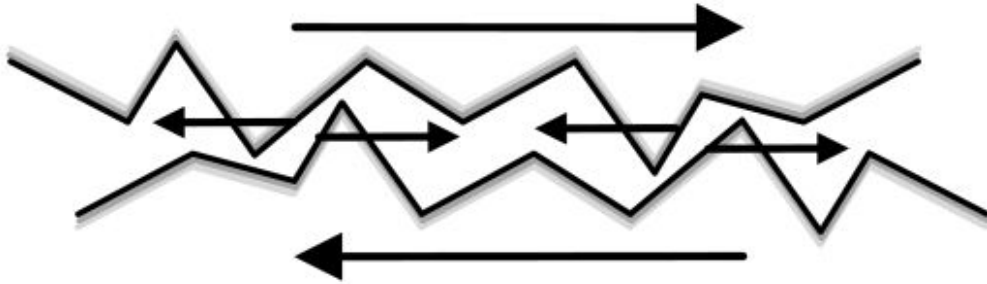
The second B stands for **Barriers**. Barriers add or decrease friction to completing a behavior. TLDR: make it easy for me to do!



BENEFITS

The third B stands for **Benefits**. Benefits add or decrease motivation to completing the behavior. TLDR: make me want to do it!

Eliminate Friction!



Small hassles such as finding a stamp, filling out a form, providing payment information, or searching for the right website can easily prevent people from following through on giving.



Make Giving Feel Really Good (Immediately)



FEEDBACK

Feedback guides our actions. We like doing actions that return an immediate, emotional, and positive response.



Spotlight Social Norms



Marketing strategies can take advantage of this by implying that many people like us already love donating

- *Donors like you gave...*



Prime the Right Identity



We want to act in alignment with our beliefs about ourselves. We have many identities, such as student, friend, employee, helper, etc. Our actions might align with our identities in multiple ways.



Emphasize Different Attributes



We have a limited amount of attention to weigh the pros and cons of our decisions. We quickly grow used to our environments and products, so new and novel attributes—or those we haven't thought of—tend to stand out.

- *Frame as novel and urgent*

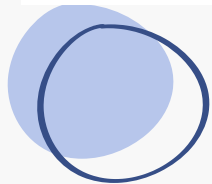
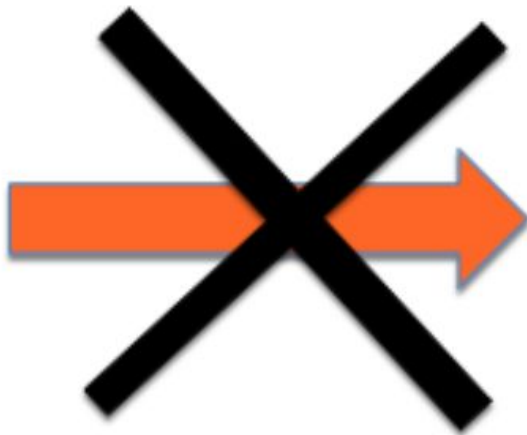


Bundle Short-term Temptation With Long-term Benefits



People are more motivated to complete activities with long-term benefits if they are paired with something desirable in the short term.



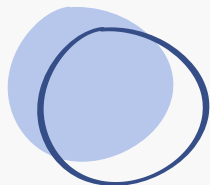
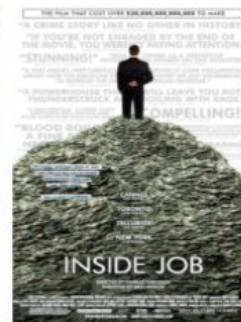
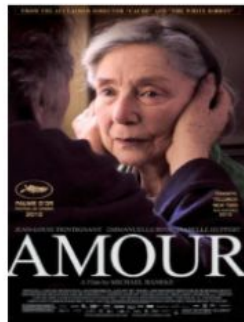




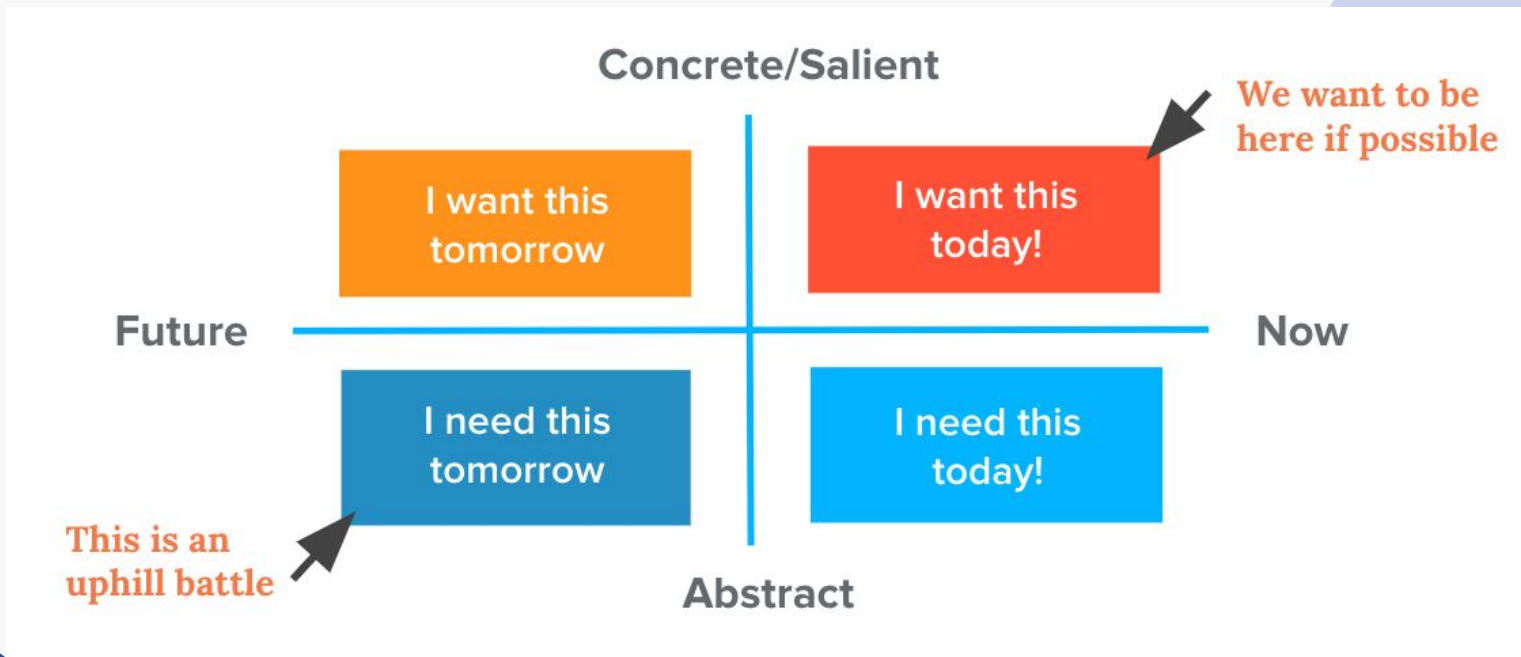
Key Behavior

AMPLIFY BENEFITS

NETFLIX



AMPLIFY BENEFITS



Needs November



- ✓ **Share a need story**
 - **An unfinished/incomplete story of a participant or person served by the organization**
 - **You might think...**
 - **Please take some time to consider and plan**



Needs November



Send a thanks-for-giving communication

Hi, my name is Cherian and I'm an member of the board of AFP. During Thanksgiving, I'm especially grateful for you and your previous support. Because of your generosity, we've seen incredible growth in membership and accessibility. You know that there is still many fundraisers to serve and so I hope you'll consider continuing your support in the future.

Thank you again!

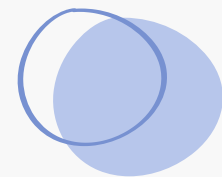




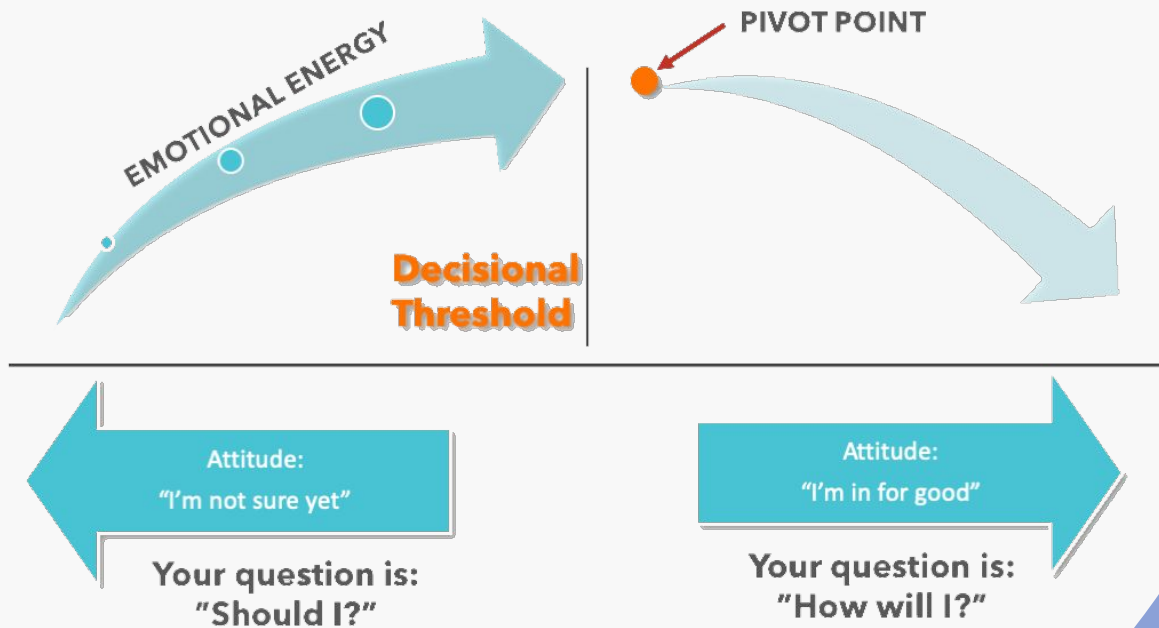
FRAMEWORK FINALE



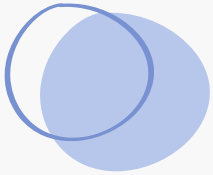
Intentionally design
engagement strategies
for your audience!



THE COMMITMENT CONTINUUM



STRATEGY:
Increase your commitment by creating consequences of failing. Then set your mind to focus on the question how.
- Rory Vaden



LAW OF DIMINISHING INTENT



Deadline December



Send a mailed appeal with an email chaser and associated social posts

Hi Ellie,

I just wanted to see if you received my letter this week. Here's a link to the AFP Foundation to learn more about our mission. I really think it's important for all fundraisers to be able to access professional development, resources, and community programs. I would love to have you involved with it. Let me know if there are any questions I can answer for you. Your continued support by the end of the year will make it possible for us to plan on how many people we can say YES! to in 2024.

You can also donate online here if that's easier: www.afpglobal.org/donate

Thank you,
Cherian



Deadline December



- ✓ **Send an appeal reminder and email chaser in the last week of December**
 - **Short and sweet – it's a reminder not a new appeal**
 - **The deadline is hope-filled and aspirational, not desperate**



Joyous January



- ✓ **Send an acknowledgement as quickly as possible**
 - **Not *just* a receipt**
 - **Personalized and prompt**
 - **Continue the journey**



Need more than those templates?

Check out NonprofitOS!

<https://www.iwave.com/try-nos/>

nos

Nonprofit
Operating
System

An iWave Product



UNDERSTANDING DONOR PROBLEMS



IDENTIFY

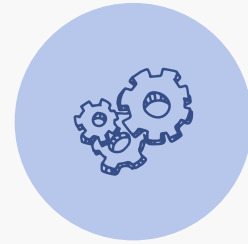


Listen for “I wish I could do more” language and probe assets with a story.



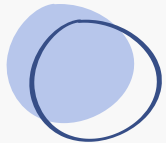
IDEATE

Would it be helpful if we could solve your financial problem while also doing something meaningful with your resources?



DEMONSTRATE

If you give a gift of assets, here's how you benefit and here's how the cause benefits.





GET THE NEXT MEETING!



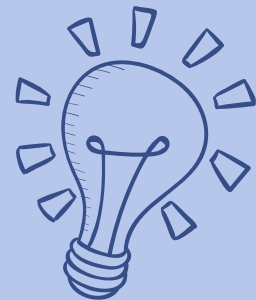
Dr. Russell James

[https://lawreview.law.ucdavis.edu/issues/
53/5/symposium/53-5_james.html](https://lawreview.law.ucdavis.edu/issues/53/5/symposium/53-5_james.html)



04

YOUR SCENARIOS & SOME POTENTIAL SOLUTIONS





KEY TAKEAWAYS

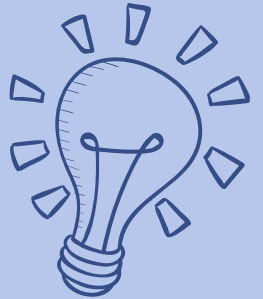
- **Consistency**
- **Intentionality**

**Above all: Abandon Random
Acts of Fundraising!**



04

YOUR SCENARIOS & SOME POTENTIAL SOLUTIONS





THANK YOU!



Cherian Koshy



NonprofitOperatingSystem.com



**cherian
koshy**