

# LISA SIMPSON FOR NONPROFITS:

What Science Can Teach You  
About Fundraising, Marketing  
and Making Social Change

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**Network**  **for Good**  
for Nonprofits

Sea Change  
Strategies



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This eBook was written by Katya Andresen, Alia McKee Scott and Mark Rovner.

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## About Network for Good

*The Home of Easy & Affordable Online Fundraising*

At Network for Good, we don't just give you a DonateNow button—we help you make sure people click on it. And we don't just give you EmailNow—we help you run a great email campaigns. We help you become an online fundraising and marketing superhero without superhuman effort or a big budget.

Here are a few of the ways how we can help nonprofits succeed online:

- 1 Easy, affordable fundraising solutions: Get donations on your website with [DonateNow](#)
- 2 Email campaign and newsletter tools: [EmailNow](#) powered by Emma for sending and tracking mass emails and telling you which messages work best
- 3 Online event management: [EventsNow](#) powered by givezooks! for accepting donations, registrations and ticket purchases online
- 4 Free weekly fundraising and marketing tips: [Sign up here](#) for great advice delivered to your inbox each week
- 5 [Fundraising123.org](#): Our free online learning center is filled with ideas and best practices on what it takes to be an online fundraising superhero.
- 6 [TheNetworkforGood.org](#): Our online community where nonprofit professionals can connect with each other.

We're biased, but we think there are many good reasons to work with us:

- ☑ **Kinship.** We understand you because we're a nonprofit too
- ☑ **Value.** We handle the tough parts of online fundraising for you
- ☑ **ROI.** Our customers raise \$20 for every dollar they spend
- ☑ **Support.** We provide lots of training and support via phone, email and chat

Sea Change Strategies



## About Sea Change Strategies

Sea Change Strategies is a boutique strategic marketing and fundraising group specializing in high intensity partnerships with remarkable causes.

Our product is sea changes. What's a sea change? It might be a new way of working. Or a new way of talking about your work. It might be turning a one-way conversation into a two-way conversation. Or activating a cadre of super-volunteers eager to take you to the next level.

Every project is custom crafted to meet the needs of our partner organizations. Every group needs its own sea changes.

Clients include the Monterey Bay Aquarium, International Rescue Committee, Conservation International and Environmental Defense Fund.

Visit us at [SeaChangeStrategies.com](#) and get more ideas and resources including our study, *The Wired Wealthy: Using the Internet to Connect with Your Middle and Major Donors*.

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## Really important information: aka an authors’ note

We know everyone but family usually skips authors’ notes, which is why this section is called Really Important Information. We don’t want you to skip it.

Our thinking in this eBook is an evolution of the principles we explored in another eBook *Homer Simpson for Nonprofits: The Truth About How People Really Think and What It Means for Promoting Your Cause*.

In this eBook we build on the behavioral economics framework we previously examined and expand it to include other applicable scientific frames of thought including cultural cognition and psychology that we believe are most relevant to the nonprofit space.

We call it Lisa Simpson for Nonprofits because:

- (A) It’s a sequel to *Homer Simpson for Nonprofits*
- (B) Lisa is a science nerd with an artist’s soul and a passion to do good—a great combination for nonprofit marketers
- (C) It’s a clever title that got you to open the book.

We hope you enjoy it and look forward to your feedback.

Sincerely,

Alia, Katya and Mark



Alia McKee  
Sea Change Strategies



Katya Andresen  
Network for Good



Mark Rovner  
Sea Change Strategies

## INTRODUCTION: Science—It's not just for nerds

### Alia's Story

I grew up in a family of engineers and scientists—the lone artistic type swimming in a sea of equations and research.

To illustrate my point, for fun, my sister—a chemical engineer—likes to calculate the speed of moving trains we're on by estimating the distance between electricity poles and counting the seconds between them. (Average speed = distance/time).

And while I did drop out of Advanced Placement Chemistry II—to the chagrin of my father—science still holds a special place in this marketer's heart.

That's because it's not just for "science" nerds. Scientific principles matter to the rest of us—and we as nonprofit marketers, fundraisers and social change makers should take note.

You artistic types like me don't run away just yet.

I'm *not* talking about knowing the ins and outs of the Hadron collider and how and why it accelerates particles. I'm talking about understanding the science of human behavior. Humans—after all—are who we as marketers are trying to engage and persuade. But too often, we base our campaigns and our messaging—not on the realities of the human psyche or on data—but on our gut instincts and fear of rocking the organizational status quo.

The scary thing is the status quo and our instincts are often completely wrong.

What's more—the stakes in our space are extraordinarily high. We're not hawking hamburgers and iPads. We're persuading people to take actions to protect our Earth. We're asking people to volunteer their time and money to fight for human rights. We're engaging people to change the world. And we need to make sure we're using every tool to help us succeed.

Enter in the wealth of scientific research and learning that we can explore, put into practice and test. This eBook is intended to be an introduction to some of the most relevant scientific principles we have gleaned from research with a focus on takeaway lessons you can put in practice immediately.

We provide studies and examples that answer the following questions and more:

- 1 What influences the decisions people make?
- 2 What most effectively motivates us?
- 3 How do we identify ourselves?
- 4 How do our values influence our reactions to marketing messages?
- 5 Why do people give donations?
- 6 Why are abstract concepts difficult to grasp and what does this mean for marketers?

Throughout the eBook we provide tips to help you think of ways you might apply the principles in your work. And as always, we urge you to test those ideas. Remember—science is data-driven.

We hope you enjoy this and we encourage you to share your reactions. Visit us at [www.Fundraising123.org](http://www.Fundraising123.org) (and join us at our session at the 2011 Nonprofit Technology Conference) to continue the conversation.

We welcome your inner Lisa Simpsons—and your passion to do good—all of which we share.

## The truth behind why people give

*It's the question we all really, really want to answer: Why do people give, and how do we get them to give more?*

Okay, so maybe that's two questions, but if you're a fundraiser, the reason you ask the first question is you absolutely must answer the second. It's your job.

That's what this opening chapter will help do. And because these questions are so important, we're not answering them by ourselves. We're bringing in the big brains by turning to 30 PhDs who conducted research on these very topics. (Their various studies are all featured in the book, *The Science of Giving*). In the pursuit of their answers, our intrepid researchers did all kinds of things. They spied on people confronted with a collection box. They eavesdropped on a public radio fundraising drive. And they tested how people felt about plunging their hands in ice-cold water for a cause. Really.

And guess what? The same essential truths kept emerging.

### TRUTH #1

#### **Giving is mostly emotional and irrational.**

As you will read in the next chapter, people are irrational. People who support good causes are no exception. But at least they are predictably irrational, in the words of Dan Ariely.

Here's how they are predictably irrational: The right brain tends to rule the left in giving, and people donate out of feeling more than thinking. In fact, if you make people stop and think, they tend to give less.

In a National Science Foundation-funded study that was published last year, a group of researchers tried different ways of asking for donations to help sick children. They wanted to see just how much our feelings about ourselves and our empathy for others affected our decision to

give—and secondly, how much those factors influenced the amount we gave. They pitted the heart against the head by having people focus on how they felt about sick children vs. having them calculate the value of the children's lives.

Stephan Dickert, Namika Sagara and Paul Slovic found that donor emotion definitely ruled. The single best predictor of the decision to donate anything at all was how the participants were feeling about *themselves*—for example, a desire to make themselves feel better or avoid regret about not donating. When they heard about the pain or need of sick children, they wanted to leave those negative feelings behind by making a donation.

The amount people gave was affected by the degree of empathy they felt toward the sick children. Donations were higher when folks were primed to think of their feelings. The more they were primed to think in an analytical, deliberative way, the less they gave. Feeling beat thinking in dollars donated.

The role of the heart is so strong there's evidence people might even donate more when it's painful. (We can't think of more striking proof of irrationality than that!) This is called the martyrdom effect. People will suffer for a cause they care about deeply, and they derive greater value and meaning from that painful effort.

The researcher Christopher Olivola has studied charity endurance events like walkathons. The bigger the effort put in by participants, the more money raised. And the more pain participants experienced, the more their friends were likely to give in support of them. He told us this is one of the most surprising findings he's encountered in his career.

Further research showed just how important this spirit of sacrifice can be. People were asked to react to two different ethical scenarios. First, there was a doctor who ran a successful practice in Hollywood, earning \$700,000/year and giving \$20K to Doctors Without Borders to

save 500 lives. Second there was a different doctor, who actually worked for Doctors Without Borders in developing countries and made \$18K/year and saved 200 lives. Which job choice was better? The guy who saved fewer lives, said the research subjects. No doubt about it, the heart—and sacrifice—mattered most.

Olivola also did a curious study that found people donated more to a charity if they were told that in order to give, they had to put their hands in freezing cold water for a minute. We think that's weird, and so did he. Don't put dry ice in your end-of-year appeals. But you get the idea: we'll do some crazy things for charity. Because it's not about the head, it's about the heart.

What does that mean to you? **Appeal to the heart, not the head.**

## TRUTH #2

### Giving is personal.

The closer we feel to a cause, the more likely we are to give.

Just how much do personal connections influence giving? That's the question that Rebecca Ratner, Min Zhao and Jennifer Clarke explored. They found that when people have a personal connection to a cause (or know someone who does), that can lead them—and others—to be more supportive. The researchers delved into the nuances of this so-called "norm of self-interest"—and what they found was incredibly important.

In one study, research subjects were told different stories about a college student. In one case the student had a parent who suffered a heart attack and in another case, the student had a parent who had been diagnosed with cancer. When the student graduated, it was said that person would work for the American Heart Association or the American Cancer Society. Some research subjects got a scenario that matched to the parent's condition and some did not. Research subjects were asked how they would react if the student invited them to a volunteer event. When the event was directly related to the student's personal experience, people were sympathetic and said they would have a hard time saying no. When the event was not (ie, the student who supposedly had a parent who suffered a heart attack was advocating for the Cancer Society), the effect was not the same.

Personal connections and stories have a big effect on giving—so if you've got them, use them.

Another way that giving is personal is that we give more when we feel we're helping another person to whom we can relate. This has been called the "identifiable victim effect" or "singularity effect."

As researchers Tehila Kogut and Ilana Ritov have shown, people donate more when they can identify with one person in need. People are most likely to help an individual whom they perceive to be similar to their social category and nationality—or when they share that person's ideology. The looser that connection and the greater the psychological difference, the weaker the identifiable victim effect.

As Elizabeth Dunn told us:

*We're biologically wired to process the concrete—other people, not statistics. We grasp statistics, but they don't tap into our emotional response.*

So how's a fundraiser to reduce this feeling of social distance? What if you're trying to raise money for Lisa Simpson in a room full of Barts?

Researcher Deborah Small recommends:

- When you talk about a cause, discuss the need in terms of people who are as relatable as possible.
- Stop with the statistics. Tell stories about one person in need.
- Use social networks (such as Causes on Facebook or Crowrise) to win support for a cause. Have friends ask friends to help. When we know the person asking for money for a cause, we're more likely to give.

## TRUTH #3

### Truths #1 and #2 are really, really hard to change, so just roll with them.

Researchers have tried to figure out if you can strip emotion and parochialism from donation decision-making and get people to think more objectively. Michaela Huber, Leaf Van Boven and Peter McGraw have looked into whether you can get people to stop being ruled by impulse and stop identifying with individual victims. After all, many people say they want to be objective and focus their help on the

severity of suffering rather than emotional reactions. But can they?

The researchers tried a bunch of things to shift giving from the heart to the head, including a “cooling off” period before donors give and asking people to be more mindful of the influence of their personal beliefs. None had earth-shattering results – in fact, these acts tend to lower giving.

If you’re a fundraiser, you could try to change how people give. Or you could just roll with it.

As researcher Daniel Oppenheimer tells us:

*Crafting solicitations that appeal to human psychology can feel manipulative at times, which is why it’s important to remember **people really do want to give**. They like giving; it makes them happy; it provides meaning. When we help people give, we’re not just assisting charities and the causes that receive the money—we’re also helping the donors.*

Which brings us to the next truth.

## TRUTH #4

### Giving makes people happy.

Researcher Michal Ann Strahilevitz puts it this way:

*Most fundraisers probably don’t think of themselves in the business of selling happiness to donors, but that is ... their job.*

Strahilevitz, plus Lalin Anik, Lara Aknin, Michael Norton and Elizabeth Dunn show why this is true:

- Giving makes people happy. In studies, people who committed random acts of kindness were significantly happier than those who didn’t, and spending money on others makes us happier than spending money on ourselves. We get a warm glow of pleasure, and we feel better about ourselves.
- The emotional benefits of giving are highest when we spread out giving into separate experiences rather than doing it once (the sum of each positive experience is bigger than the high of one gift). Even business students who understand the time value of money preferred to give money away in increments over a year rather than all at the year’s start (best for the charity) or year’s end (best for the giver). This is a big finding because it

underlines just how important are recurring gifts! Let donors sign up to make small contributions over time—they will feel happier.

- Happier people help others more, and they give more. A positive mood makes you nicer! This makes a circle: Giving makes you happy, and when you’re happy you give more, which makes you happier, which makes you give more. That’s a circle of generosity that we love.

As Elizabeth Dunn tells us, “The emotional experience of donors matters.”

So should you advertise that happy payback as a fundraiser? The short answer is payback should be expressed carefully. Sending out a tote bag might actually detract from the warm-fuzzy a donor felt when they gave—and make them less altruistic in the future. If you train people to react to a market norm, they lose the social norm. For example, a matching gift campaign elevated giving in the short term—but depressed giving over time. Reminding people of the happiness that giving provides them DOES have a good effect on generosity. The bottom line? Make giving about the feelings—happy ones—that come from genuine generosity.

## TRUTH #5

### Giving is a social act.

Since we’re all social creatures who are well-versed in peer pressure, it shouldn’t come as a surprise that our giving is heavily influenced by what we perceive other people to be donating. We’re all about keeping up with the Joneses, even when it comes to philanthropy.

Rachel Croson and Jen Yue Shang did some nifty research during an actual public radio fundraising drive, and they found social information heavily influences donations. People who called in during a public radio fundraising drive gave more money when the volunteer answering the phone said another caller had given a generous gift of a certain amount (\$75—the average gift—\$180 and \$300). Mentioning a prior donation of \$300 lifted giving by 29%! And when volunteers answering the phone said the prior donation was made by someone of the same gender as the caller, the average gift increased 34%. The same effect was seen in direct mail.

Amazingly, the higher giving continued in future years.

Individuals who were provided with social information were significantly more likely to renew their membership and give more than those who hadn't gotten the social information.

The suggestion of other donors' gifts also had the power to reduce donation levels. When direct mail recipients received social information lower than their previous year's contribution, they lowered their giving by an average of \$24. The downward effect was big—twice as big—as the upward effect!

Fundraisers take heed: use social information—but highlight the high end of the donations, not the itty bitty gifts.

The researchers also explored whether the size of the donors' social networks (their real-life social networks, not Facebook or Twitter) affected the levels of their contributions—especially when they were primed to think about the size of their social network. So during another fundraising drive, a public radio station asked callers how many friends and family also listened to the station—in some cases before the donation and in others, immediately after.

People with bigger social circles gave more when reminded of the size of their network before giving. It didn't work with people with small networks, so when using social proof and encouraging networking, focus on the people who are the most well-connected.

Last, in case you needed any more evidence of just how socially influenced we are, researchers Richard Martin and John Randal showed this once again when they placed a clear donation box in a museum. They watched visitors to see when they were most likely to give. They tried sparsely filling vs. stuffing the box. They played with filling it with big bills vs. coins. Then they carefully noted what happened to the donation amounts, the number of people giving, the average donation per donor and the average donation per visitor.

Having some money in the box significantly increased giving. When the box was empty, giving was at its lowest. People tended to give what they saw in the box. If people saw bills, they tended to give the same denominations of bills. If they saw coins, they gave loose change. The smaller the "peer pressure" level of donation, the more often people chose to give. It's easier to go along with the crowd if it's cheap!

So when you fundraise, make it clear that other people are supporting you. If you use tickers or thermometers in your campaigns, don't show progress until you HAVE progress. An empty thermometer will probably perform like the empty box.

## TRUTH #6

### **These are sweeping generalizations. Test for yourself.**

There are rules of thumb, and you need to experiment for yourself to see what works with your donors. That's why we'll be devoting a whole chapter to data!

But first, let's dive deeper into just how irrational we are.

## CHAPTER TWO: Reason is overrated

*Win the heart and the mind will follow.  
The intellect can always find logic to justify  
what the heart has already decided.*

As nonprofit marketers and fundraisers, we're in the business of persuasion. Our job is to guide others toward the adoption of ideas, attitudes and actions.

But we're failing. To be frank, we're getting our asses kicked.

### WHY?

The other night my mother and I teared up over... a Kleenex commercial—yes, a Kleenex commercial. In a 30-second spot, Kleenex marketers sold us disposable snot rags by tapping into the emotion and vulnerability of how difficult it is to say goodbye to someone you love dearly (and of course you need a soft tissue on hand when you do now, don't you?).

And yet a majority of nonprofit communications (which focus on issues more dramatic than Kleenex could ever dream about) don't surface a hint of that kind of reaction.

That's because in crafting our strategies and tactics, we often make a fatal mistake: We assume that people are rational, and we make our persuasive arguments in a data-driven, linear way.

We try to sell snot rags instead of relationships.

The truth is—people don't respond to rational messages. We don't respond because we simply aren't rational beings. But we are predictable.

Enter in the science of behavioral economics.

Behavioral economics rejects "rational choice theory" or "rationality"—the dominant theoretical paradigm in economics. When we say rationality, we mean the idea that a person balances costs against benefits before taking an action and will make the decision that is in his or her best interests. (*Allingham, 2002*).

Behavioral economics challenges the notion that people will choose the best action or the most logically presented choice and explores the bounds of rationality—identifying the *patterns* of social, cognitive and emotional factors that influence the decisions people make.

The big takeaway? People don't arrive at most decisions through a process of weighing costs against benefits. In their book *Nudge*, Richard Thaler and Cass Sunstein put it simply: Real people make decisions like Homer Simpson, not Spock (2008).

A few of the following irrational patterns relate directly to information we surfaced in Chapter 1. However, they are worth repeating here.

### TRUTH #1

**People are more likely to do things if they see other people are doing them (even if it counters what they know is logically correct).**

The Asch conformity experiment demonstrates the power of this principle. In this experiment, participants—real subjects and confederates (researchers posing as participants)—were all seated in a classroom. They were asked a variety of questions about lines on a placard such as "Which line is longer than the other?" and "Which lines are the same length?"



*One of the pairs of cards used in the experiment. The card on the left has the reference line and the one on the right shows the three comparison lines.*

The group was told to announce their answers to each question out loud. The confederates always provided their answer first and always gave the same answer as each other. They answered a few questions correctly but eventually began providing incorrect responses.

In the test group, the researchers found that 75% of the participants gave an incorrect answer. While in the control group (which didn't include any confederates) only 3% gave an incorrect answer.

Even when it's completely illogical, people follow other people's lead.

So what does this mean for you?

Don't forget to tap into this concept of social proof by telling the stories and showing the faces and counts of others in your movement. Did 25,000 other people sign a petition? Are you expecting a record turn-out at a rally? Are other donors raising money on your behalf? Tell these stories and you will inspire others to join along.

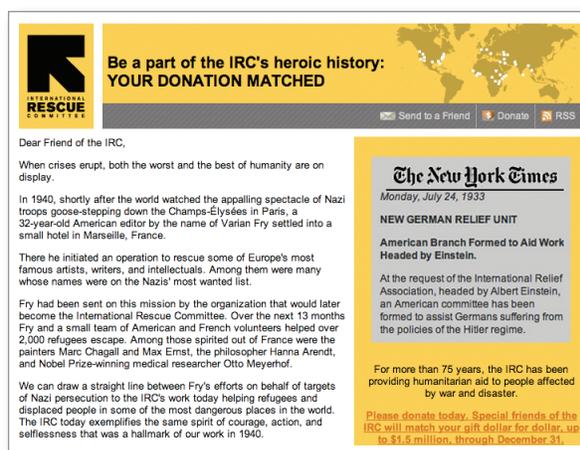
## TRUTH #2

### People will tend to obey authority figures, even if they are asked to perform objectionable acts.

Stanley Milgram exemplified this principle when he measured the willingness of study participants to obey an authority figure instructing them to give an electric shock to an unseen, but heard, confederate. In Milgram's first set of experiments, 65% of participants administered the experiment's final lethal 450-volt shock.

You can certainly put this principle to work for you in a less disconcerting way by showcasing authority through your credentials and experience in action:

- Give your CEO and other prominent program staff a personal voice in your communications
- Create a bench of authoritative spokespeople in line with your brand who can testify to your work
- Showcase your organization's history or what makes you unique.



The IRC website does a good job of showcasing their history.

## TRUTH #3

### People are easily persuaded by other people whom they like.

In his book *Persuasion*, Robert Cialdini cites the success of the marketing of Tupperware (through Tupperware parties) as an early example of what might now be called peer to peer marketing (2001). The Tupperware product isn't any better when it comes endorsed by a friend, but Tupperware found its sales doubled when marketed by peers.

We are broken records when it comes to this principle. It is imperative that you tap into the passion of your "enthusiasts" and give them the tools to be your brand ambassadors. They hold credibility and authority within their peer circles and can do word-of-mouth heavy lifting for your organization and cause.

Plus, during a time when our jobs are all being crunched by budget limitations, wouldn't you kill to have a tribe of 25, 50 or even 100 people helping to lift your load? Take advantage of this truth and empower your passionate.

## TRUTH #4

### When it comes problems, the bigger the numbers, the less people care.

In a rational world, our constituents would want to save as many lives as possible. But as we mentioned in Chapter 1, people care more when they can identify with one person in need.

That’s why people pulled out their wallets to rescue baby Jessica who fell down the well, yet aren’t compelled to give money when informed that every day 22,000 children die from preventable diseases.

According to psychologist Paul Slovic, the bigger the scale of what you’re communicating, the smaller the impact on your audience. An aphorism to remember—“One death is a tragedy; a million deaths is a statistic.”

See Chapter 4 for specifics on getting tangible.

## TRUTH #5

### People are hardwired to understand our world through emotions and stories, not facts.

This principle is so important it merits not one but two chapters of its own: Chapters 3 and 4.

These are just a few examples of our irrationality in action.

But despite these facts, many progressive causes are still trying to appeal to Spock, aka making their cases in cerebral ways. You might be surprised at how small shifts in messaging can have a significant impact.

So what’s a marketer to do? Here’s a simple irrationality check list:

- Don’t make arguments that are heavy with statistics or numbers. If you use more than one number in your communications, that’s too much.
- Don’t educate people on the complexity of issues by showing shades of gray. Think black and white.
- Don’t sell snot rags. Tap into the emotion and passion of your work. See Chapter 3 for details.
- Leverage social proof by showing the faces and telling the stories of the people in your movement.
- Have your constituents do outreach on your behalf.
- Show credible authorities in action.
- Once you win hearts, be directive in what you want people to do. Do you want them to take action, make a donation, or buy Kleenex? Be specific so you don’t squander an opportunity when you have them hooked.

#### Spock Speak

#### Homer Speak

Wisconsin GOP Tries Illegal Tactics to Pass Anti-Union Bill	Teachers and nurses are thrown under the bus in state budget cuts to benefit big corporations and the super rich
Public option	Death panels
1.1 billion people around the world don’t have access to clean drinking water.	Jean Bosco gets sick when he drinks water he collects from his only source – a murky, pollution-ridden pond.
Organization X needs you to do x, y and z.	Five other people in Austin are doing x, y and z. Will you join them?

## CHAPTER THREE: Second that emotion

*There is no longer debate about the centrality of emotion in fundraising and giving. Charitable decisions are fundamentally emotional ones. Reason enters into it, but only in a supporting role.*

Social psychologists have a wonderful word to describe our tendency to make emotional decisions and then to rationalize them after the fact. They call it *confabulation*. The heart decides and the brain justifies. The rational brain confabulates.

It's important to remember that emotion does not equate to maudlin Hallmark Card aphorisms or rank sentimentality—though Hallmark sayings might in fact make better fundraising copy than bullet points loaded with statistics. The constellation of emotions includes intuition, bravery, passion, righteous indignation, caring, commitment, joy, sadness, empathy, on up to the queen of emotions—compassion.

What is it about fundraising that roots it in emotions?  
What makes charitable giving different?

Nothing. In fact, emotion rules nearly *all* of our decisions.

Pioneering social psychologist Jonathan Haidt uses the metaphor of an elephant and a human rider seeking to drive it. The elephant is our emotional/intuitive brain, the product of millions of years of neurobiological evolution. It's the part of our brain that operates independent of conscious thought, that guides fight or flight reactions, and processes the vast majority of information flowing in through our senses.

The rider represents reasoning and language, an evolutionary newcomer relatively speaking. The rider (Freud called it the superego) wants to be in control, but can never win a contest of wills with the elephant.

In their groundbreaking book *Switch: How to Change Things When Change is Hard*, Chip and Dan Heath borrow the Haidt metaphor to craft a brilliant set of tactical principles for getting the rider and the elephant on the same page (2010). Creating meaningful change you no doubt have learned for yourself is almost always hard.

Extending the Haidt/Heath metaphor, convincing someone to donate or get involved with your cause usually means learning elephant-speak. How do we connect with our donors' elephants?

**Here are four key strategies:**

### **1. Make strategic use of photography and images.**

A powerful photo is catnip to elephants (how's that for a mixed metaphor?). Too often fundraising or organizational publications include grip and grin shots of people in business attire, or pretty but disconnected images such as the Capitol Dome. The choice of photography is often either a last-minute decision or delegated to a junior staff member.

Here's my hypothesis, for someone brave enough to test this: A fundraising email or letter with strong images and weak copy will outperform a letter with strong copy and weak photography.

What makes for a strong image? Ask your elephant. If you have a *visceral reaction*, it's strong. Close-ups of human (and sometimes animal) faces are a good place to start. Images of suffering innocents have been shown in experiments to provoke compassionate behavior. Think: Haiti.

## 2. Let your own passion show.

Passion is contagious. This is a variation on the social proof theme. Back in the day, before we bipedal hominids had language, emotion was a primary form of communication and group cohesion. When people feel your passion, a set of specialized brain cells fire in synchrony—and other people literally feel what you are feeling. Aptly called “mirror neurons,” these brain structures may be the source of human empathy, a very special emotion that probably underlies a great deal of charitable activity. More on that in Chapter 4.

## 3. Avoid the guilt trip.

Don't piss off the elephant. People react poorly to being told something is their fault (a bad habit among environmentalists and others). The usual reaction is to question (or worse) the messenger—and that would be you. In a few instances, if you create space for someone to discover their own role in creating a problem, you might get a positive response, but those exceptions are rare and require consummate skill.

## 4. Tell a story.

Here's another chestnut people have heard a thousand times. The truth is we've learned to pay lip service to storytelling, or in Haidt-speak, our riders are on board. But telling a story that matters requires close elephant-rider collaboration. And that deserves its own chapter, so keep reading.

## CHAPTER FOUR: Empathy, compassion and ripping yarns

### *If emotion is the mountain every fundraiser must climb, compassion is what lies at the summit.*

Compassion, literally *feeling with*, combines empathy (deeply understanding the feelings and suffering of others) with a determination to help. Without compassion, there is no charity.

In Buddhism, this active empathy is called Bodhicitta, the heart of enlightened mind. Every great religion has a name for this exalted combination of altruism and personal engagement. It's the holy grail of philanthropy and social change. It's the rider and the elephant dancing in unison to heal a broken world.

As fundraisers, it's not enough to arouse sympathetic emotions. We need to motivate people to act on those emotions, to vote with their checkbooks. We need to overcome all kinds of weird defense mechanisms we've evolved to avoid the painful feelings that come with acknowledging the presence of suffering in the world. And we need to overcome tribal instincts, the tendency to constrain our empathy and concern by clan or political party or nationality.

Research shows that this is all possible, though not always easy. The most powerful tool in the fundraiser's bag of tricks is to tell a great story.

### **Storytelling: The Killer App**

Think, quick—what's your favorite movie?

Putting aside you French film snobs, most of you thought of a movie that was dramatic, that got your emotions going, that got you riled up. You cried when the dog died. You thought you might have a heart attack when the hero walked into the ambush. You seethed when the bad guy stole the widow's last dime.

Hollywood filmmakers—the good ones at least—have mastered the art of evoking empathy. That's what dramatic stories do. And it's not just an intellectual experience. When we see someone we care about going through an emotional upheaval, those mirror neurons that we discussed in Chapter 3 fire—and we feel what they feel, *we experience their emotional pain as if it was our own*.

Those neurons fire even if intellectually we "know" the story is make-believe. That's why we can watch the same movie over and over, and even though you know every scene and every word, you find the journey just as emotionally satisfying.

And this is even bigger: Those storytellers can arouse empathy for protagonists who are not members of our tribe. They may not even be human.

What's all that got to do with fundraising? *Everything*.

There is no more sure fire way to engage someone emotionally than through dramatic stories. (Emphasis on the word *dramatic*.)

You're nodding yes, yes I know all this. We all know it, but then why do so many organizations tell crummy stories?

Let's start with a typical (and imaginary) story:

*A devastating earthquake struck Imagistan. Thousands were killed and many more were homeless, injured, and exposed. The [INSERT YOUR ORG] was on the ground in 24 hours, treating 16,000 injury victims, providing 30,000 tents and reducing mortality by 34 percent.*

It's praiseworthy. But it's a lousy story. And it won't get you very far up the compassion mountain.

What would turn our Imagistan story into a drama, one that will stick in the minds of donors and get re-told again and again?

## Here are four key ingredients that make up the DNA of any great story.

### 1. A relatable protagonist.

Cultural cognition (see chapter 6) and other research suggests that people will only relate to another if they share values, or come from the same socio-economic background, or have the same race or religion. But Hollywood needs you to feel empathy for a protagonist that might be a fish (Nemo) or an alien (Avatar). Making you feel at one with a shepherd in the Sudan is child's play for the Steven Spielbergs and Aaron Sorkins of the world.

Here's how they do it:

**The protagonist is an individual, not a group or an institution.** Remember Deborah Small's individual victim research, where donors were more likely to give to a single suffering child than to a group of children, or in response to statistical evidence of suffering? This is the same principal at work. Our elephant brain evolved on the savannas, where abstract thought was either a luxury or did not yet exist. You need one sentient being to serve as your hero.

**The protagonist is facing relatable and universal conflicts.** What unites us all is are the trials and tribulations of being human. In his short brilliant book, *The Golden Theme*, author Brian McDonald argues that all great stories share a universality that dissolves tribal or cultural barriers.

One screenwriter and highly acclaimed Hollywood script doctor lists seven qualities that make a character universally relatable:

- 1 Relatable pain, such as illness or loss. Notice that almost every Disney movie opens with the death of a parent.
- 2 Has to make a tough moral choice.
- 3 Has a sense of mystery.
- 4 Is funny.
- 5 Takes action to make things better.
- 6 Is good at what they do.
- 7 Is the victim of unfair treatment.

Mark's favorite film, *Die Hard*, employs all seven of these devices to make the Bruce Willis character one of the most memorable heroes of moviedom. Next time you watch a movie, see how many of these traits mark your favorite hero or heroine.

In order to quickly establish a link between audience and character, writers often use what is called a "save the cat" moment. Early on, the hero will do something universally appealing, such as saving a cat trapped in a tree.

Also, consider making someone you serve the hero. Maybe the best story is not the rescue worker who flies in like Wonder Woman to save the day. Maybe it's the young widow, who despite living in a war-zone and having no visible income, keeps her family fed and her kids on the straight and narrow.

### 2. Lots of conflict.

Conflict is story oxygen. The more conflict, the more engaging the story. Powerful stories are about suffering and hardship. Don't spare the details of the carnage the rescue workers encountered, that is the heart of your story.

Acclaimed story guru Robert McKee put it this way in a *Harvard Business Review* interview:

*The great irony of existence is that what makes life worth living does not come from the rosy side. We would all rather be lotus-eaters, but life will not allow it. The energy to live comes from the dark side. It comes from everything that makes us suffer. As we struggle against these negative powers, we're forced to live more deeply, more fully.*

Most organizations Mark has worked with hate conflict. They don't like to name names. They are afraid of unleashing powerful emotions. Ironically, if an organization ever succeeded in sanitizing its communications of all emotions it would never raise a dime. But they do try.

### 3. A loathsome villain.

Think about your favorite films growing up. Chances are, you remember the bad guys, maybe better than the hero. Who remembers the name of the man in *101 Dalmations*? Everyone remembers Cruella De Vil. Villains evoke powerful emotions, and if you are in the social change business,

they invoke just the emotion you need to motivate your audience. It's hardly a coincidence that the world rallied to the defense of the suffering people of Darfur, given the atrocities committed by the Janjaweed militias.

The same rules apply for villains as for heroes—the best ones are individuals, not institutions. It's about BP CEO Tony Hayward complaining in the midst of the Gulf blowout that he “wants his life back.” It's not about “big oil.” Organizations are exceptionally squeamish about personalizing villains. That's a big part of why their narratives are so mediocre.

Sometimes organizations make the villain so abstract that it has no emotional appeal at all: “The villain isn't Exxon, it's all of us who drive SUVs.” That may be intellectually true, but it's not the basis for a decent story and it's not emotionally appealing.

#### 4. Kitchen sink details.

Remember the aphorism “one death is a tragedy, a million deaths is a statistic?” Take that idea a step further. Avoid all statistics, they bore the elephant to death. Make your story as visual as possible. What does the rescue tent look like? What are the sounds and smells? Be as concrete as possible. If a story element can't connect with one of the five senses, be suspicious of it.

So let's revisit that story and try to integrate some of those principles. It might look something like this:

When the shaking finally stopped, Marianna scrambled frantically through the rubble that had been their house looking for her baby sister Angelica. Remarkably, Angelica was unhurt. Even though she was only nine Marianna knew she had to be strong for her baby sister. Her mother had been working at the factory. Marianna prayed her mama would come home.

When the XXX relief workers came the next morning, they found Marianna rocking her baby sister amidst the rubble singing the lullabies she had learned when she was a baby. Not until XXX team member Sean pointed it out did Marianna realize her right wrist was broken. In the rescue van, Marianna refused to give up Angelica; she clung to her baby sister while a doctor splinted her broken bone. Even then, Marianna showed no pain.

When they arrived at the emergency center, Sean stayed with the girls while other workers searched for their mother. The XXX had set up a database using hand-held computers to reunite parents and children separated by the quake. Not until Marianna saw her mother, injured but alive, did she allow herself the luxury of tears. Her mother took her to their temporary home, a fresh tent with the XXX logo on the door flap.

Twenty years later, Marianna wears that logo on her lapel; she heads XXX's emergency services for her nation. She will never forget that terrible night. But the next morning she met the face of hope, wearing an XXX jacket. She'll never forget that either.

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Does this sound really hard? It is. But for those who devote themselves to the mastery of powerful storytelling, great benefits await. Just ask the good people at Charity: Water, who have harnessed the power of stories to extraordinary effect.

As McKee puts it, “If you can harness imagination and the principles of a well-told story, then you get people rising to their feet amid thunderous applause instead of yawning and ignoring you.”

## CHAPTER FIVE: Get tangible

*A few years ago, Proctor & Gamble launched a cause-related marketing campaign in South Africa. It was called “1 Pack=1 Vaccine,” and for every pack of diapers sold, a child was vaccinated against tetanus. It was wildly successful, boosting Pampers sales and resulting in 150 million vaccines.*

A rival campaign didn't fare so well. Its slogan was less tangible, not to mention wordy: “1 pack will help eradicate newborn tetanus globally.” Meh.

Unfortunately, as this example from researchers Cynthia Cryder and George Loewenstein illustrates all too well, we often talk in intangible terms, and it doesn't work very well. The vast majority of good causes have messaging closer to the failed campaign. And that's a very *tangible* problem.

Why do you need to get as tangible as the 1 Pack=1 Vaccine message? Because:

- 1 Donors are skeptical and need reassurance your cause is effective. Being specific about what you do with donations instills trust.
- 2 Tangibility bolsters the belief a gift will make a difference. Buying diapers that help fight tetanus globally is less emotionally compelling than vaccinating a baby. We want to know we're making a real human impact, not just a dent in a huge problem.
- 3 Being concrete makes people care more. People have stronger emotional reactions to an individual or specific situation, which in turn makes them more generous.

There's no doubt about it: People like to support specific needs. Research shows people give two to three times more money when an intangible need is replaced with a specific impact.

This effect is so strong, there's even research that shows people are more generous when a beneficiary of help has already been identified than when that person hasn't yet been chosen. For example, in a field experiment where supporters were told about a new Habitat for Humanity home, the group that was told about a specific family that would live there donated 25% more than the group that received information saying one of four profiled families would have the house.

On the same theme, when donors were asked to choose charities to support and then pick the total amount to give, they donated more than when the order was reversed.

A researcher into this phenomenon was inspired to study this effect further when his daughter's school class had an aquarium filled with sea monkeys (which are actually just brine shrimp). The researcher noted the monkeys kept dying off until there was only one little sea monkey left. No one seemed to care until there was only the one monkey left floating. The children, who'd viewed the crowded tank as an undifferentiated mass, became hugely devoted to the last sea monkey. They described its personality and cared deeply about its survival, though its brethren's deaths had barely raised an eyebrow.

Inspired, the researcher did a follow-up study with sea creatures. When participants saw many together in a tank, they were less likely to describe them as conscious, smart or interesting. They were far more likely to bond with one creature alone—or with an odd-looking standout from the crowd.

We relate to the lone sea monkey, and we relate to its story. As Cryder and Lowenstein explain, we're far more likely to share on and act upon stories that are about people rather than crowds and that are emotional rather than informational.

As Daniel Oppenheimer told us:

*Make the beneficiaries of the donation more tangible to the donor. Maybe send a picture of the school that was built with that money. Or a newspaper review of the show that the community theater was able to put on. Or a thank you note from the child who received an immunization. Having a clear idea of how you helped makes the gift more meaningful and increases the likelihood of future donation.*

That's because tangibility not only increases the chance someone will give, it also makes them happier with the giving experience. Cryder and Lowenstein cite studies that show people are most excited to make donations at the end rather than the beginning of a fundraising campaign goal, so they feel they made gift that put the organization over

the top. Kiva has found that as the goal for each microloan approaches, the rates of donations increase significantly. In a separate study via direct mail, donors were far more likely to give when a campaign was 85% to its goal than when it was at 10% or 66%. So if you're close to your fundraising goal, mention it. If you're far away, better to keep it quiet. It's like that empty donation box from Chapter 1. No one wants to be out there acting alone, however tangible the outcome.

Technology makes the act of showing progress toward a goal or tangibly illustrating your programs quite easy. So there's no excuse not to.

## CHAPTER SIX: Friends like us—how values shape us

### The Usual Suspects

I was at a small party the other night. I looked around the room and I was not surprised to see a group of close friends chatting about politics, music and movies over a cheese plate and several nice bottles of wine.

But something that evening did stand out.

In this setting, each guest (all of us artists, free thinkers, and lovers of life) sidestepped our individuality and embraced our shared values as a group.

We all nodded our heads enthusiastically whenever others spoke. We could all easily relate to each other's political and social references. No one said anything the group thought was controversial. No one rocked the boat.

All in all, the evening was pretty conventional for a group of "non-conventional" people. But we felt safe. We felt happy. We felt like we belonged.

#### At play here are values.

People gravitate towards people and ideas that reflect our own individual values, which are intrinsic to how we identify who we are, what we do and what we care about.

The values we hold can be sliced up in a variety of ways. They vary by country. They vary by profession. They cross political party lines. They vary by experience.

Regardless of the variety, the bonds these values create are extremely strong—they help us construct a community of like-minded people who will validate our viewpoints of the world.

#### So what?

Understanding the role values play is extremely important to us as marketers trying to do good in the world. In order to influence people, you must first, understand their values and second, communicate with them in terms that reflect these values.

#### But how?

Cultural cognition refers to:

*The tendency of individuals to conform their beliefs about disputed matters of fact (e.g. whether global warming is real; whether the death penalty deters murder; whether gun control makes society more safe or less) to values that define their cultural identities (Dan Kahan, The Cultural Cognition Project).*

In short, people tend to make decisions about their stance on controversial issues not based on facts and reason but by conforming to the groups with which they most powerfully identify. That is why we see intense disagreement over the same facts.

According to social scientist Dan Kahan, this polarization strengthens the prevalence of "our" group's view and strengthens the group's acceptance of us as a member in good standing – both of which are extremely important to the survival of social animals like humans.

But the groups are much deeper than political affiliation, religion, gender or family. Cultural cognition suggests that "group" also means the way you think society should be organized and should operate. Kahan identifies people along two continua.

- **Individualists**, who think that society should mostly let each member do his or her own thing. At the other end of that spectrum are **Communitarians**, who think we all are in it together and society should operate more as a whole rather than a bunch of independent members.
- **Hierarchists**, who prefer a society with well-identified class and authority structures and a firm and predictable status quo. At the other end of that spectrum are **Egalitarians**, who prefer a more open society with fewer pre-determined class and authority structures and a less rigid status quo.

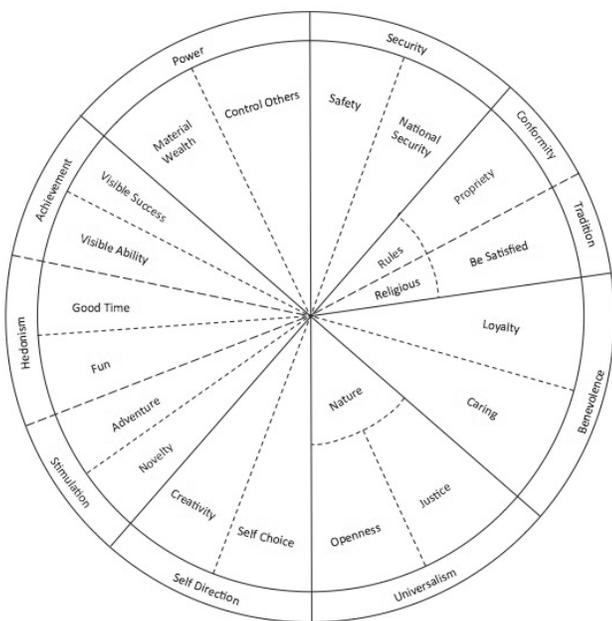
Studies by Kahan and his colleagues have found that these cultural cognition characteristics are more predictive of people’s positions on climate change (and many of the so-called Culture War issues of the day) than the traditional demographics of political party, age and education.

Communitarians and Egalitarians show more concern about climate change (and most environmental issues) because the solutions challenge the status quo and will require a joint response by society.

Individualists and Hierarchists are much more likely to be climate change skeptics, because acknowledging the problem threatens the way they think society should operate.

To complicate things further, Cultural Dynamics, a research and strategy consulting firm, has created a chart of Values Modes—categories of the ten dominant values they believe people use to guide their lives.

### Values Modes



Most of our organizations tend to communicate in only one or two values modes—usually universalism and benevolence. You know who you are—your appeals are about openness, justice and doing the right thing.

However, only a specific segment of the population is driven by those values. There are others who are motivated by security, tradition or power.

Which means to reach people on their terms, we have to think differently.

For instance, in a small town in Kansas, climate skeptics—people who don’t believe in global warming—have begun to embrace energy saving tips when they were couched in terms of energy independence and defending the status quo of a strong America, which is more appealing to Hierarchists and Traditionalists (“Kansas Climate Skeptics Embrace Cleaner Energy”, *New York Times*, October 19, 2010).

### My head is going to explode.

How am I supposed to communicate my issue or cause to all of these different value sets?

Well, first, relax. This chapter is food for thought.

If appealing and identifying to groups outside of your traditional value set is not a strategic priority to help you reach your goals and objectives, you can breath a sigh of relief.

But to start simply, remember these truths.

### TRUTH #1

#### Cultural values trump rationality—even when it comes to evaluating science and data.

The facts alone are not enough. People are different and have different psychological, cultural and political reasons for acting. Information is necessary but insufficient.

We need to communicate the facts, of course. But we need to pay much more attention to, and show much more respect for, the way those facts feel. How might you couch your facts in terms of someone who is an Egalitarian vs. someone who is an Individualist? How would the story you tell shift?

## TRUTH #2

### Group ties motivate people.

People tend to endorse whichever position reinforces their connection to others with whom they share values and commitments. It's not just that other people are doing it. It's that other people *like them* are doing it.

Further, experts whom laypeople see as credible tend to be persons with whom they perceive to share values. Consider who you identify as your spokespeople and authority figures. If you are reaching out into a different value mode, make sure your "experts" mirror the values of your target audience.

## TRUTH #3

### Values polarize.

Cultural cognition causes people to interpret new evidence in a biased way that reinforces their predispositions. As a result, people with opposing values often become more polarized, not less.

So this is how our political system got to where it is!  
But seriously, in order to prevent further polarization, we must think of ways that affirm rather than threaten opposing values.

## TRUTH #4

### Research is key.

In order to know what types of values your target audience holds, you should do research. Do surveys. Do interviews. Consider focus groups. Base your assumptions on real-world attitudes and behaviors rather than your gut instinct.

## CHAPTER SEVEN: Be data driven

*So now that we've said over and over that emotion trumps reason in fundraising and marketing, we're going to talk about...data.*

Yes, data.

But this data you won't share with your constituents. This data you'll use to make sure you are communicating with those constituents most effectively.

As we've demonstrated, people are influenced by whims, impulses and values that are difficult to anticipate. You never know what strategies and tactics will work best until you test them. That is why testing is a must in nonprofit marketing and fundraising.

As Daniel Oppenheimer tells us:

*People aren't 'rational' when it comes to giving. We are influenced by all sorts of things that probably shouldn't matter. Often, this leads to counterintuitive behaviors, which means evidence-based practice really is important. There is a real role for research in determining the best fundraising approaches, and charities really should be thinking empirically about donations. Don't just trust your gut; run experiments.*

For those of you looking sheepish, don't worry. We're guilty of not testing sometimes, too. But people are so difficult to predict, we're doing our causes a disservice each time we don't test. We're potentially leaving money, actions and opportunities on the table.

Further, tests that are done haphazardly or on a whim won't serve your program most effectively. Our recommendation is that you create an annual testing calendar in line with the scientific method so you can optimize your learning.

For instance, by December (the biggest fundraising month of the year), you'll want to have tested your donation forms

thoroughly so you are serving the most optimized version throughout the month.

For those new to testing, here's a quick primer on how it works:

### Step 1: Be clear on your goals.

What are your objectives with this campaign or effort? If you are unclear on your goals, you won't know how to measure success. See Step Four.

### Step 2: Outline a testable hypothesis.

The key word here is *testable*. That is, you will perform a test of how two variables might be related. This is when you are doing a real experiment.

For example: Integrated online/offline messages will yield higher results in regards to money raised, average gift and response rate (both online and offline) than do online and offline messages that are not related.

### Step 3: Outline your testing methodology.

- Test Group: 50% of donors (who have given both online and offline) for whom we have an email and mailing address.
- Control Group: Remaining 50% of donors (who have given both online and offline) for whom we have an email and mailing address.

#### Test group segments will receive:

- Pre email mirroring messaging of direct mail
- Offline letter

#### Control group segments will receive:

- Control online treatment
- Offline letter

## Step 4: Outline metrics you will measure.

- Total money raised (measured both separately by channel and then combined)
- Average gift (measured both separately by channel and then combined)
- Response rate (measured both separately by channel and then combined)

And while we strongly advocate testing, we just as strongly advocate testing *well*. A poorly run test isn't worth the effort you and your staff will invest into it.

Here are some testing pitfalls to avoid:

### 1. When you are looking for breakthrough results, it makes no sense to test small things.

Testing small items such as subject lines and the color of your call to action button may uncover some amount of low-hanging fruit. However, when you are looking for a big breakthrough, think big with your tests.

Test content. Test treatments across segments. Test a long-term cultivation program on a test cell. Test messengers. Test channels. Test!

Get creative and bold. But make sure your creativity and boldness can be tested.

### 2. Avoid using samples sizes that are too small to produce statistically significant results.

*It's not how many people you solicit; it's how many responses you receive.* In order to have a statistically valid test, you'll need 100 responses for each test cell - 200 responses for a simple A/B test. For a donor renewal effort with a projected 5% response rate, this means soliciting 4,000 names (2,000 per cell) for a valid test. In a new donor acquisition effort with a 1% response rate, you'd need to solicit 20,000 names (10,000 per cell).

If you don't have a large list size, here are some suggestions:

- Test fewer elements. Ditch the four-way test and try a 50/50 split test.
- Carry the test across multiple efforts until a statistically significant number is reached.

- Don't extrapolate. When you don't test a statistically valid quantity, you can't assume a larger group will behave the same way.
- Re-test. Always retest to see if you replicate your results.

### 3. Don't ignore past test results.

At times, we get valid test results, but they weren't what we expected so we are tempted to ignore them. Your test results are the voice of your donors and activists, so listen to what they are saying even if it's not what you expected to hear. We suggest keeping a "testing bible" that brings together your organization's learning's over time.

### 4. Don't think that because something worked for a competitor or another campaign that it will work for you.

You must test it with your audience. Enough said.

### 5. The data you generate is only as good as the analysis you do of it.

Make sure you set up systems to accurately measure your test and incorporate that learning into your future campaigns.

And finally, don't be afraid to fumble. We've learned a lot about testing through failed tests. Being data-driven is a daily practice that you must exercise to excel.

## Lisa Says

We hope you have enjoyed this foray into the world of science and why we believe it matters for nonprofit communicators. (It didn't even require safety glasses or a Bunsen burner to boot).

If you are inspired, we encourage you to delve deeper into the resources on the next page as well as the ebook *Homer Simpson for Nonprofits: The Truth About How People Really Think and What It Means for Promoting your Cause* available at [Fundraising123.org](http://Fundraising123.org).

And remember, while we primarily explored Lisa Simpson's science side, we want to emphasize the importance of her artistic soul and passion to do good. It is the combination of all three – science, creativity and passion -- that really creates marketing magic.

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