The importance of psychological well-being in driving charitable bequest decisions

Rogare praxis paper #1

Legacy fundraising

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ROGARE
THE FUNDRAISING THINK TANK

Contents

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Foreword

Claire Routley

This paper on psychological well-being in legacy decision making is the first in a new series of praxis papers for Rogare.

From its inception, one of the core aims of Rogare has always been to translate ideas from academic research into professional practice. Praxis, which means 'doing' or turning theory into action, is therefore at the centre of what we do.

Each of these praxis papers will showcase a fundraisers' recent research completed for a PhD or Master's degree and provide some suggestions about how fundraisers can apply this in practice. We're focusing on this academic research because it's already been reviewed and passed through the academic quality-control process – meaning that readers can be confident that it is robust.

And we're focusing on research conducted by fundraisers themselves so readers can be confident that it will be relevant to the issues that they face and will have a practical impact on their work.

With the growth of professional fundraising education, there's an increasing amount of insightful and robust fundraising research being carried out – but so much of that research stays behind the scenes in lengthy masters or doctoral dissertations.

Even when the research is published in a more concise form in academic journals, paywalls can mean that it doesn't filter down to fundraisers working on the ground, and thus doesn't make its way into professional practice. We hope that this series of papers will showcase some of the most interesting, most up-to-date research in the sector in an accessible, readable way.

As someone whose day job and academic research focuses on the fascinating world of legacy fundraising, I'm particularly pleased we are opening the series with a new paper on legacy fundraising.

Unsurprisingly, I believe that leaving a legacy can have positive benefits to both charity and donor. Therefore, it's particularly exciting to see Lucy Lowthian's work explore different psychological benefits of legacy giving, and how those can be enhanced through fundraising practice.

Rogare is looking to publish three or four of these papers a year, and we would very much like to hear from people who have a study that they would like to share.

But for now, please enjoy exploring these fascinating findings, and we hope that they make a practical difference to your work.

Dr Claire Routley
- Head of gifts in wills consultancy, Legacy Voice
- Rogare Council member and editor of the Rogare praxis paper series

1
Introduction – why we need more research into charitable bequests

The future of legacy giving is an incredibly exciting one. We have seen legacy giving grow over the last 20 years and in 2007 legacy income was worth £1.7bn, which has now doubled. This is set to double again by 2045 (Legacy Foresight 2019).

Despite this positive increase in legacy giving, challenges remain. According to unbiased.co.uk (2017), around 60 per cent of adults do not have a will and only 6.3 per cent of people in the UK include a charitable bequest (Smee & Ford 2019). This highlights the vast amount of unrealised charitable legacy income, which provides a real opportunity for future growth in legacy giving if more people can be encouraged to leave a charitable bequest in their will.

According to renowned legacy expert Claire Routley (2011) – who has a foot in both practitioner and academic camps – legacy giving is one of the areas in which a significant increase in giving to charity can be made. Sargeant and Jay (2014) believe that fundraisers need to get much better at soliciting charitable legacies in order to avoid a big loss of legacy income.

There is no doubt that legacy marketing is becoming more prominent, and charities are not afraid to mention legacies in their communications with potential legacy supporters. While it can be seen as a positive step forward that charities are talking more openly about legacies, participants in a study conducted by Sargeant, Hilton and Wymer (2006) reacted negatively to a number of organisations' legacy fundraising approaches. Legacy marketing can be a tricky method to get right and there is always the risk that it can put potential legacy supporters off.

As Stephen Pidgeon (2005, p1) says: "If ever there was a need for research into the marketing of fundraising products, giving through legacies is surely it." However, research in this area is still sparse, so greater progress needs to be made to understand what drives the charitable bequest decision. It is therefore important to find ways to encourage more people to include a gift to charity in their will.

Fundamentally, people need to be made aware of legacy giving, but we also need to understand how donors want to be approached about the subject, so it becomes a more meaningful experience. This would help all those involved in the legacy giving process to facilitate it in a more meaningful way to encourage more people to consider a charitable bequest.

Legacy giving is an under-researched topic, which is why I wanted to focus my doctoral research at Plymouth University on understanding more about a person's psychological well-being and how this affects the charitable bequest decision, including how we can move people from 'considering' a charitable bequest to an intention to leave one.

My first survey examined which psychological factors drive the charitable bequest decision and move a person from consideration to intent in the legacy journey. The second survey then drilled down into some of the key findings from the first survey, using scenarios to prime low/high levels of certain psychological factors to see if different combinations of each affected a person's intention to leave a charitable bequest in their will.

This Rogare praxis paper summarises some of the discoveries I made as part of my research and suggests how these could be applied in practice. I am delighted that this new series is launching by featuring my work.

Dr Lucy Lowthian
- Legacy marketing manager, Samaritans
- Member of the Rogare Legacy Fundraising Knowledge Collective.

2

Psychological factors that drive the charitable bequest decision

It is clear that more research is needed to understand if psychological well-being affects the charitable bequest decision and how consideration of a charitable bequest can be changed to intent. There is huge potential to increase the number of charitable legacies, for example, if will writing professionals and charitable organisations prime potential legators about legacy giving in a way that positively enhances their well-being. Understanding legacy giving from the donor's perspective would help to ensure any approach made about charitable bequests is as effective as possible.

We know that potential legators experience different stages of the legacy journey, two of which are 'consideration' and 'intention' (Magson 2018). 'Considerers' feel a sense of warmth towards a charity and have thought about who they might include in their will, while 'intenders' have made their decision, after considering their options and possibly discussing this with loved ones and know which charities will receive a legacy gift (Williamson 2018).

Little is known about the relationship between 'consideration' and 'intention' or what moves a person from one stage to the next. My first study (see Appendix 1 for the methodology) examined whether certain psychological factors moderate (affect the strength of)[1] or mediate (influence/ have an effect on) the relationship between consideration and intention, which would provide us with a better understanding of the legacy decision-making process and how we can move supporters on in the legacy journey:

1. Connectedness
2. Self-efficacy
3. Purpose in life
4. Identify importance.[1]

I explore each of these factors in more detail on the following pages and provide some suggestions about how my findings can be applied in practical ways by both will writing professionals and legacy fundraisers.

1 Identity importance was introduced as the moderator in my first study. A moderator variable affects the strength of the relationship between other variables.

2.1 Connectedness

Connectedness is the closeness or intimacy a person feels in their relationships with others. A person builds these relationships over their lifetime by growing their social networks, so these networks become important in their lives (Daraei and Ghaderi 2012).

They can forge strong relationships with charitable causes if they, or someone they love, have in some way benefited from its work. A person must therefore feel connected to the charity if they are to include a charitable bequest, so charities must work hard to build strong connections with their supporters.

An interesting study – by Texas Tech University's Russell N. James III (one of the most prolific academics studying charitable bequests) and James Michael W. O'Boyle – used brain scanning research to understand if certain aspects of the brain are activated when a person considers leaving a gift to charity in their will (James and O'Boyle 2014). They found two areas of the brain are activated. These are used in internal visualisation.

So a person could be reliving important moments in their life, thinking about their connections with certain charities or whether certain causes have supported their loved ones.

According to Routley and James (2018), "our most vivid autobiographical memories are often concerned with the people we love" so honouring them can be a trigger for making a charitable bequest.

Connectedness is focused on others, and it has real relevance in a person's decision to include a gift to charity in their will.

How fundraisers can apply this

The charitable bequest decision is different from other donation decisions. It is a much more personal and emotional decision for an individual, so charities must take this into consideration when approaching their supporters for charitable bequests. Building connectedness should be at the heart of how charities communicate with their supporters.

For example, we know stories connect on an emotional level, so using case studies is a powerful way to motivate people to leave a charitable bequest. Connecting supporters with beneficiaries creates a personal bond, so supporters can envisage who they are helping. Charities need to consider their approach and tone of voice to ensure supporters are treated more like a friend.

This finding also highlights the importance of the language used in prompts from a solicitor or will writer. For example, they could say to their client, "there may be a charitable cause that you feel personally connected to that you would like to include in your will" or "there may be a charity that has been an important part of your life that you would like to include in your will".

Language that evokes emotion and encourages a person to focus on their life experiences and beliefs could motivate them to think about the charitable causes that have been important to them during their lifetime.

> *'The charitable bequest decision is different from other donation decisions. It is a much more personal and emotional decision for an individual, so charities must take this into consideration when approaching their supporters for charitable bequests.'*

2.2 Self-efficacy

Self-efficacy is a person's strong belief that they can achieve their desired outcomes and make a difference by focusing on their longer-term goals (Bandura 1997).

Self-efficacy is not purely concerned with immediate outcomes; it is about the persistence needed from beginning to end, looking at the long-term goals of the task (Rodgers, Markland, Selzler, Murray and Wilson 2014).

Self-efficacy helps a person *do* because they believe they *can* succeed. So self-efficacy empowers people when they are deciding whether to include a charitable bequest because their belief that they can make a difference to the work of the charity and its beneficiaries is much stronger.

Although there is relatively little research with regards to self-efficacy and charitable giving, self-efficacy appears to motivate people, when they are writing their will, to focus on the future of charitable causes and the positive impact their gift can have.

As I found in my research, higher levels of self-efficacy significantly increase the likelihood that someone will include a charitable bequest in their will.

How fundraisers can apply this

Charities need to show the ways a person's legacy gift can make a difference to beneficiaries.

Charities are becoming more innovative in the ways they show the impact of their work. For example, virtual tours (of a research lab for instance) can really help a charity bring their work to life, enabling people to see first-hand the impact of their gift. More charities are also investing in legacy TV advertising to showcase the difference gifts in wills make.

Making a difference is an important aspect of the charitable bequest decision and people need to understand the impact their gift can have. Charitable bequests are often larger than other gifts, so they have a greater ability to make a transformational difference to the lives of others.

'Self-efficacy helps a person do *because they believe they* can *succeed. It empowers people when they are deciding whether to include a charitable bequest because their belief that they can make a difference to the work of the charity and its beneficiaries is much stronger.'*

2.3 Purpose in life

Research has demonstrated that people who understand their life's purpose tend to be more optimistic, well-connected, and happier individuals who are more engaged with life (Ryff and Singer 2008; Routledge, Ostafin, Juhl, Sedikides, Cathey and Liao 2010; Daraei and Ghaderi 2012). The older people get, the more purpose in life they could have - they have had more experiences, gathered more meaningful memories, and created a greater life narrative.

This could explain why more gifts in wills are left by older people who have more life experience. Purpose in life comes from reaching one's true potential and is an important resource to maintain psychological well-being (Ryff and Singer 2008).

Leaving a bequest to charity encourages a person to think about their life and what is important to them. For example, a beneficiary or volunteer may want to give something back to a charity that has been an important part of their life. There is also a greater sense of meaning in the act of leaving a charitable bequest because it provides a way for people to make a difference after they are gone, so enhancing their purpose in life. Their legacy will live on and benefit future generations, which is an incredibly positive way to be remembered.

These findings resonate with the work of Rosalie A. Kane – the acclaimed gerontologist at the University of Minnesota, who died last year. She discusses a link between legacy giving and the importance of reflecting on what we consider important in our life, such as our accomplishments, people, work, and social institutions (Kane 1996). All of these things shape our lives and provide a sense of purpose. They have an impact on what we would like to pass on to others and how we would like to be remembered.

Having a clear purpose in life results in greater psychological well-being, and, according to Shang and Sargeant (2017), one way this can be achieved is through charitable giving, because donors feel like they are making a difference which provides meaning in their life.

How fundraisers can apply this

Many charities are now focused on creating meaning with regards to charitable bequests and ensuring donors are emotionally engaged. It is becoming more important for charities to have compassionate conversations about death and legacies that their supporters consider meaningful.

People must be presented with the opportunity to influence things beyond their lifetime, and this is where a charity must showcase their ambitions in the most effective way they can, including sharing their future aspirations.

When prompting the consideration of legacy giving, it is important to concentrate on the meaningful act of making a charitable bequest, so a person is inspired to include a bequest in their will, adding to their sense of purpose in life. This could include how charities and will writing professionals broach the subject of charitable bequests, focusing on the meaningfulness of a bequest and what is important in life (and after death) to the person.

'There is also a greater sense of meaning in the act of leaving a charitable bequest because it provides a way for people to make a difference after they are gone, so enhancing their purpose in life. Their legacy will live on and benefit future generations, which is an incredibly positive way to be remembered.'

2.4 Identity importance

Every person has distinct identities, and they place a level of importance on each role they undertake. Role identity provides people with a sense of purpose, so they know what is expected of them in certain situations (Thoits 2012).

Identity grows stronger over time as people perform more in their role and develop a sense of belonging. For example, if a person has the role of volunteer or supporter for a certain charity, this could have a positive impact on their desire to include a charitable bequest because of the importance they place on the role. Their connection with the charity has more than likely strengthened over time through the relationships they forge, impacting on their loyalty and sense of identity with the cause.

My research shows that high identify importance strengthens the role that connectedness plays in moving a person from consideration of leaving a charitable bequest to intention. Higher identity importance strengthens the relationship between consideration, connectedness, and intention, making it more likely a person will leave a gift in their will. If a person strongly identifies with a charity, it strengthens their feeling of connectedness with the charity and its beneficiaries.

However, when identity importance is low, it is self-efficacy that takes over as the mediator of the relationship between consideration and intention. This suggests that – if they do not strongly identify with the charity – people need to focus on the positive outcomes of their legacy gift and the difference it will make.

'Ensuring supporters identify with the cause should be a priority for charitable organisations, as should providing them with opportunities to be personally involved.'

How fundraisers can apply this

Ensuring supporters identify with the cause should be a priority for charitable organisations, as should providing them with opportunities to be personally involved.

Regular communication with supporters can ensure people identify more closely with the charity and its work and this is something that can strengthen over time if supporters are stewarded well.

This highlights the importance of excellent supporter journeys so charities have clear plans with regards to how they will steward supporters in a way that builds loyalty and keeps them engaged with the charity's work.

This is also an important point to consider regarding existing legacy pledgers, so they remain engaged with the charity and so the charity remains in the various permutations of their will.

3
The importance of 'other' focus and creating a social norm

I also looked at the relationship between connectedness, self-efficacy and identity importance, and their effect on a person's intention to leave a gift in their will, and if these were impacted, by whether people saw themselves as being connected to others or separate from them.

I first found that when people have high levels of both connectedness and self-efficacy (a belief their gift will make a difference), then the impact of identity importance on intention to include a gift in a will is significant, but only when people are more 'other' focused (people must be willing to put the needs of others before their own).

This suggests that a person must have a strong connection with the charity they are considering leaving a legacy gift to; they must strongly identify with the charity and its work and believe their gift will make a difference. However, for these psychological factors to have a significant impact on their intention to include a charitable bequest in their will, a person must be more 'other' focused, because an important part of the decision is their desire to help others.

Looking more deeply into the importance of other focus in the charitable bequest decision, when a person believes they can make a difference through their bequest, they connect to overlap with others. A person's sense of self can become broadened to include others, which results in feelings of self-other overlap and 'oneness' (Waugh and Fredrickson 2006). A person must feel a sense of closeness to others, which highlights the importance of other focus in the charitable bequest decision.

Second, when people have higher levels of identity importance and connectedness but low self-efficacy, the decision to include a charitable bequest in their will is then mediated by what is called 'interdependent self-construal'.

Self-construal can be thought of as a "collection of thoughts, feelings, and actions concerning one's relationship to others, and the self as distinct from others" (Singelis 1994).

Self-construal can be split into independent or interdependent self-construal, with a person's actions motivated by their dominant self-construal (Markus and Kitayama 1991).

These two construals are very different in nature and can impact on how a person thinks and behaves in certain situations. Those with greater interdependent self-construal place greater importance on their relationships and connectedness with others, while those with greater independent self-construal promote

'A person must have a strong connection with the charity they are considering leaving a legacy gift to; they must strongly identify with the charity and its work and believe their gift will make a difference.'

their own goals and prioritise their own needs above others.

With 'other' focus, there remains a distinct self and other, but with interdependent self-construal, a person focuses on their similarities with others and will conform to group norms. Therefore, they will look to others to guide their behaviour if they do not have a strong belief they can make a difference by leaving a charitable bequest in their will. This links to the concept of social norming, so the act of including a charitable bequest becomes accepted behaviour.

I found that a person still needs high levels of connectedness and identity importance to have a positive impact on a their intention to include a charitable bequest in a will, but if they have low self-efficacy (they do not have a strong belief they can make a difference), the relationship is mediated by interdependent self-construal rather than other focus.

But self-efficacy can be strengthened through peer modelling, as a person believes they can succeed when they see others doing the same (Bandura 1995). They will focus on the needs of the group, or in this case, the charity and its beneficiaries, and they will act in the best interests of that group. ❻

How fundraisers can apply this

Charities (and the sector as a whole) need to promote legacy giving in a way that suggests it is a common and everyday activity to create and foster the sense that this is a social norm; the act of including a charitable bequest in a will becomes accepted behaviour.

Case studies of legacy pledgers or past legators can assist supporters with their decision making when considering leaving a charitable bequest. Some charities might form pledger societies or organise special legacy events as a way of normalising this form of giving among their supporters.

4
Model of key psychological factors influencing the legacy journey

There is a limited amount of research on legacy giving and an even smaller amount on psychological well-being.

My research demonstrates the importance of priming individuals to consider leaving a charitable bequest in a way that enhances well-being and makes them feel good, for example, in the knowledge that their gift will have a significant impact on the lives on others after they are gone.

We can increase a person's intention to include a gift to charity in their will if we can enhance their feeling of connectedness, self-efficacy, identity importance and purpose in life with a particular cause.

Using my key findings, I have developed a model (see p13) that illustrates how a person can be moved from consideration of a charitable bequest to intent, highlighting the important psychological factors which drive the charitable bequest decision.

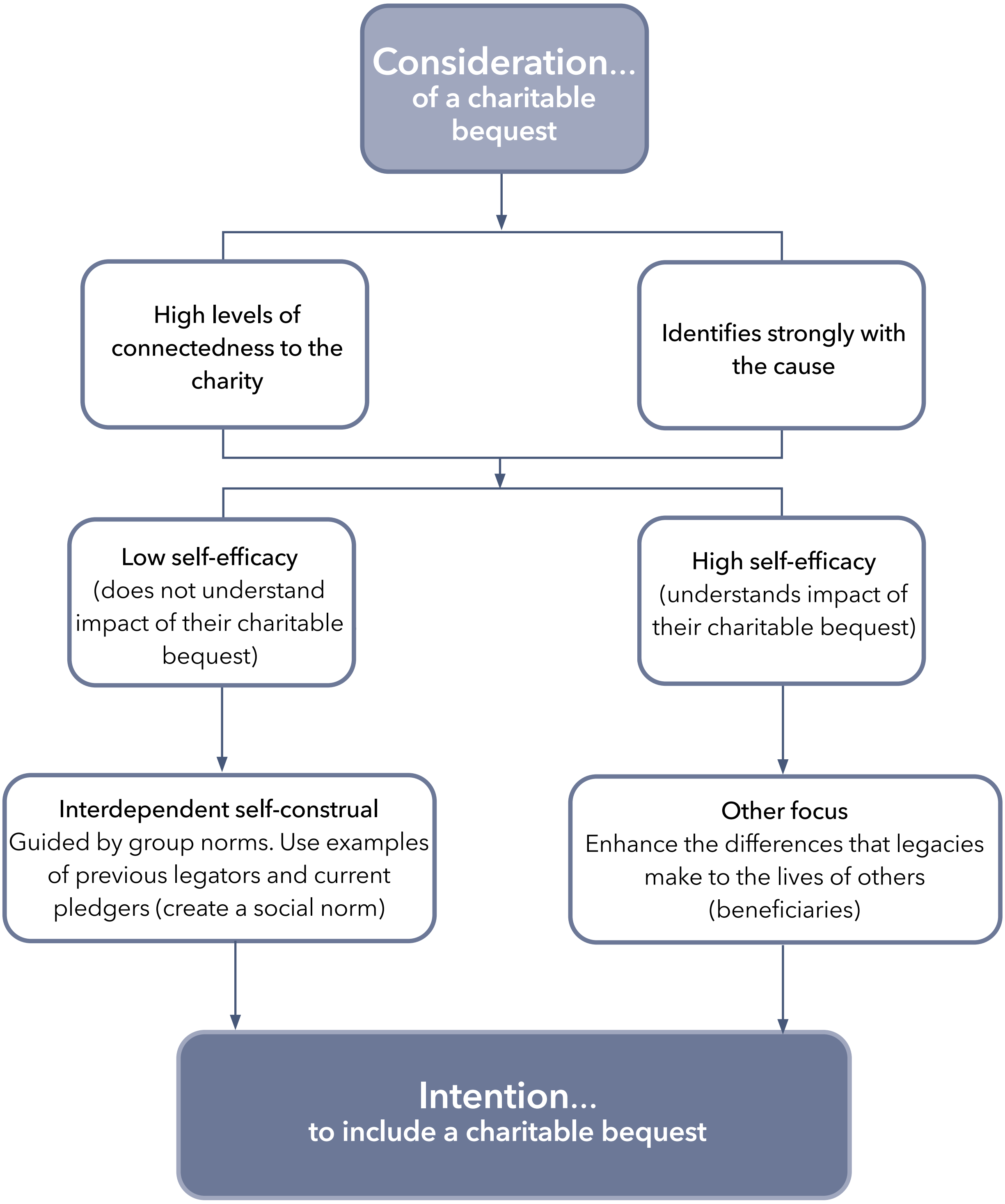
I hope that the findings of this study can provide a better understanding of the most effective ways to prime people about legacy giving.

For example, prompting the initial consideration of a charitable bequest is incredibly important but understanding which psychological factors drive the decision could make the prompt more successful.

A person needs to focus on the causes they feel connected to and can identify with; they want to believe their gift will make a positive and lasting impact on the lives of others. It is important to make the experience of including a charitable bequest in a person's will as meaningful as possible and provide a person with the opportunity to be remembered and to support causes close to their heart.

There is huge scope to increase the number of gifts left in wills to charities so any research that can contribute to making this happen has value. Legacy Foresight (2019) predicts that by 2045 legacy giving will be worth twice as much as it is today in the UK thanks to more will writing, a higher death rate and a greater inclusion of charitable bequests in wills.

It is therefore imperative to understand the psychological factors which enhance the charitable bequest experience, and which positively impact on a person's intention to include a gift in their will.



Model of key psychological factors influencing the legacy journey.

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Appendix – Methodology

To collect data for analysis, two successive online surveys were sent out to Christian Research's online panel. The surveys were open to anyone aged 18 years or over and respondents supported a range of charitable causes to ensure this study's findings could be applied to a wider population. The number of respondents across both surveys exceeded 2,100 providing a strong sample size from which to generate results.

The first survey examined which psychological factors drive the charitable bequest decision and move a person from consideration to intent in the legacy journey. The second survey then drilled down into some of the key findings from the first survey, using scenarios in order to prime low/high levels of certain psychological factors to see if different combinations of each affected a person's intention to leave a charitable bequest in their will.

Lucy Lowthian

Dr Lucy Lowthian has worked in the charity sector for over 15 years since leaving university. She began her career in community fundraising working for charities such as Macmillan Cancer Support, the British Heart Foundation and the York Teaching Hospital Charity. Lucy decided to specialise in legacy giving 10 years ago and most recently worked at Sue Ryder as the senior legacy and in-memory giving manager before joining Samaritans as legacy marketing manager in January 2021.

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