



Lessons from the GiveList

How Expert Curation
Can Simplify Giving

Authors:

Omar Parbhoo
Raegan Tennant
Sarah Welch
Katy Davis

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| About ideas42



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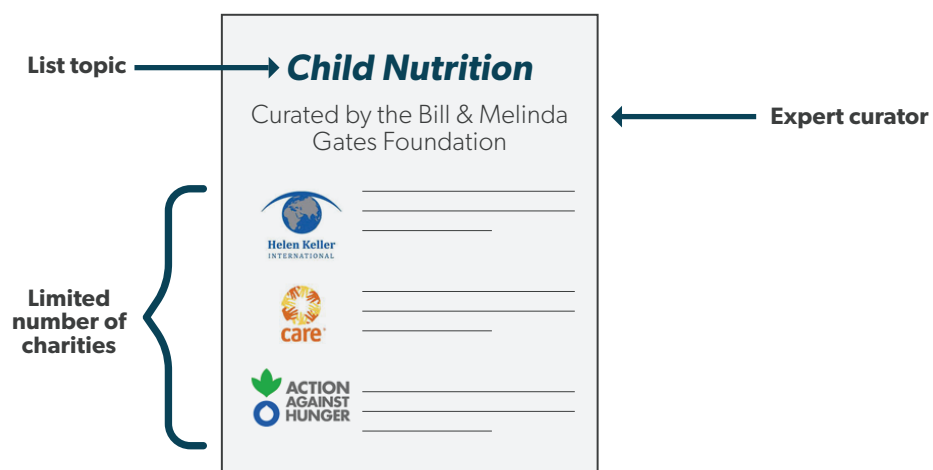
The work described in this report is unaffiliated with currently available commercial or non-commercial services with similar names like givelist.com and givelistapp.com.

>> Introduction

With over a million active charities in the United States, selecting organizations to support can be an overwhelming experience for many individuals. Having so many organizations working for the public good has a clear social value, but this level of choice makes it challenging for potential donors to find and support organizations that most closely align with their values and goals. The presence of too many options—without a way to meaningfully differentiate between them—can lead people to make poor decisions, or fail to choose at all, a phenomenon known as [choice overload](#).

When options are similar or attributes are hard to distinguish, people may have a difficult time choosing confidently. With charities, it is common to encounter multiple organizations working towards the same mission. But when comparing them, their relative effectiveness can be hard to measure and assess. Even the most determined donors may find it overly complicated to seek information on the performance of an organization. [One study](#) found that although **85% of donors said they care about the effectiveness of the charities they support, just 3% compared the relative performance of multiple organizations before making a donation.** This pattern makes it exceedingly likely that donors will not know if their gifts are going to the most effective organizations. And this lack of sufficient guidance on the quality of their choices may ultimately limit the frequency and generosity of their giving.

To mitigate this problem, we worked with the Bill & Melinda Gates Foundation and Intentional Futures, a socially-minded consultancy, to streamline ways for donors to discover high-performing charities. Specifically, we examined how expertly curated list of charities, dubbed “GiveLists,” could reduce choice overload for donors and increase dollars to effective organizations. To produce these lists, we turned to leading foundations and philanthropists with deep expertise in a range of popular cause areas. Each group compiled three to eight organizations that they believe are having a meaningful impact in their respective fields of interest—such as global poverty and conservation.



While the GiveLists were produced through a range of partners, they all share a few consistent characteristics. Namely, each one has unifying topic (typically a cause), a named expert curator, and limited set of 3-10 high-performance charities. These features all serve to help donors easily find and select organizations that they perceive as meaningful and validated, simplifying the discovery and donation process. Our speculation was that through the GiveLists, the simple guidance would help donors give better and, hopefully, more generously.

Over the course of two years, we set out to test our hypotheses, iterating on the content and delivery of the GiveLists to determine how curation could best be put into practice. To generate these insights, we conducted experiments through two channels: 1) in a controlled laboratory setting and 2) in the field with existing giving platforms. The lab tests allowed us to understand the impact of specific design features, while the field experiments gave us a window into how the GiveLists could actually shape donor behavior. In total, we ran nearly a dozen tests in the lab around a series of broad questions and nine field experiments with seven distinct platform partners, offering real donors access to lists with 15 curators and 124 nonprofits.

This report packages the main results from our experiments into generalizable takeaways that can be adapted by practitioners in the space, presenting both *Lessons from the Lab* and *Findings from the Field*. From these experiments we identified the following best practices for delivering expert curation:

- ▶ **Provide just enough choice** to give donors a meaningful number of charities to choose from without overwhelming them. Our lab tests indicate that a list of about 5 charities is likely to be the right length for most people.
- ▶ Lining up experts to curate lists can be time and resource intensive. **Consider using a generic curator** that simply indicates that some unspecified expertise was behind the selection of charities. Our experiments show that this approach can be just as effective in promoting greater giving as named experts.
- ▶ **Explain how charities were selected** to add more trust and credibility to your curated lists. People are more likely to donate when there is some visibility into the selection criteria, even if the curator is a clear expert in the space.
- ▶ A well-curated list can be simplified further if you **offer an option to donate to all**, eliminating the need for donors to choose among worthy charities. In our experiments, simply presenting users with this opportunity to give to all listed charities increased their likelihood to give.
- ▶ Our experiments in the field confirm that **GiveLists prompt more giving** among those who engage with the expertly curated content. Those individuals are more likely to give and typically give higher amounts overall.

- ▶ **Expert curators are a mixed bag** so it is crucial to find the right curator for your audience. We found that celebrity curators are most effective at grabbing people’s attention, but do not necessarily lead to more giving. Effective curators need to be perceived as credible and relevant as well.
- ▶ Finally, **curation is not for everyone**. We consistently found that many people are reluctant to engage with expertly curated lists for one reason or another. While GiveLists are effective overall, they appeal to only a subset of donors. We recommend that expert curation be one of several types of guidance on offer.

The following sections elaborate on these best practices, detailing the evidence from our experiments and providing necessary nuance behind these results. Our hope is that you will find this report a useful window into donor behavior and a practical guide on how to effectively offer expert curation in a wide range of settings.

»» **Lessons from the Lab**

Testing in a lab environment can be a useful way for researchers to quickly and cheaply generate findings around a well-specified topic of interest. The lab setting provides the control and precision to test slight variations of a product or process and enables rapid iteration and retesting. For the GiveLists, we used lab tests—through the Amazon Mechanical Turk platform—to determine how variations of key features of expert curation changed the behavior of our users. Because we could not replicate a real giving environment, we were unable to determine absolute changes in behaviors. But the tests did provide a sense of relative changes, allowing us to identify which features outperformed others.

Through these tests, we looked at four broad components of expert curation to determine what works best for donors. Specifically, we examined: 1) how many charities should be included in a list; 2) what type of curator resonated the most; 3) the best way to present curation methodology; and 4) what donation options should be offered. The lessons from these experiments are catalogued below.

1 Provide just enough choice

A common trope is that everyone loves choice, but in reality, too much choice can often be overwhelming. To that end, the GiveLists were created in part to help reduce the number of charities donors were encountering when making giving decisions. However, one concern is that too little choice may not provide potential donors with enough variety. We got to the bottom of this tension by presenting groups of participants with lists that had either 3, 5, or 15 charities (but identical otherwise) to see how giving attitudes and behavior changed.

Not surprisingly, those who saw the longest list reported feeling the most overwhelmed and experiencing the greatest difficulty in making their choice. However, it was the *shortest* list that underperformed when it came to actual giving behaviors. **The shortest lists received 5% fewer donations and 13% less in total donation amount than the longer lists.** Seeing a longer list likely increased the chance that donors recognized a charity or saw one that they liked. So despite stating that more charities made them feel overwhelmed, donors in our tests were more successful in finding organizations to give to when offered more choice.

Fortunately, there is an effective middle ground that seems to offer the best of both worlds. In our study, a list of 5 charities was the sweet spot, improving giving behavior without causing givers to feel too overwhelmed. This finding suggests that offering some level of choice is still beneficial to donors, but keeping the number of options in the mid-single digits is probably the best way to help them follow-through and actually give.

2 Consider using a generic curator

Central to the GiveLists are the experts that validate the charities being selected. Donors typically care about the effectiveness of charities¹, so we believed that signaling the quality of organizations through well-respected curators would encourage more giving. To determine whether that belief was true and to see which kinds of experts were most effective in eliciting donations, we tested lists with a range of curators to see how they performed relative to one another.

Using the same list of charities, we told participants that the curation was conducted by either a well-known foundation, a celebrity (David Letterman²), or a generic set of peers (“people like you”). Surprising to us, **the subjects donated more frequently and made larger gift amounts in response to the list from the generic peers.** One possible theory is that the framing engendered a shared identity and trust that made donating to the listed charities feel normatively appropriate and expected of our participants.

Building off of this finding, we ran another experiment with a similar set-up, except this time we tested the foundation and celebrity curators against “an expert” who was otherwise unnamed. Across the three variants, we also included an explanation of how the charities were selected to assure participants that the organizations were chosen for valid reasons. Again, we were surprised to find that the **generic expert inspired more people to donate than either named curator, leading to a higher number of gifts.**

From these tests a few possible themes emerge. For one, donors react positively to the validation offered by expert curators, but it seems that the threshold for the validation is low enough that an unnamed curator is sufficient to change behavior. Furthermore, generic curators seem to have an advantage in that they can provide meaningful guidance while being free from loaded associations that may be attached to specific people or organizations. Finally, from an implementation standpoint, it is easier to generate lists that have no specific curators attached to them since the coordination costs with real experts is quite high. Taken together, unnamed experts and generic peers are the best curators for donors, offering both the benefits of expert validation and easy scalability.

3 Explain how charities were selected

When a donor encounters a GiveList, there is a decent chance that they understand that the charities were selected through some well-intentioned process. But, as we saw in the last section, providing an explicit explanation for how organization were chosen can add an extra level of validation to the lists. What remained unclear to us was what level of detail was most assuring to donors—with too little, the choices could feel capricious; with too much, donors’ attention may be lost.

To shed light on this question, we offered participants in the lab the same foundation-curated list of charities but varied how we explained the selection process. Some people saw no explanation

¹ <https://www.guidestar.org/ViewCmsFile.aspx?ContentID=4718>

² The list was **not** actually curated by David Letterman.

whatsoever, while others were given a short note stating simply that “charities were selected because they have a high impact.” Lastly, a third group was offered a detailed, several-line methodology for how the charities were chosen.

As we suspected, **participants who were offered a short explanation donated 13% more** than those who were provided no information at all. But even with the long selection criteria, donations increased. In fact, in addition to higher giving rates, **those who were provided with the detailed methodology gave in amounts that were around 18% larger** than the gifts of those in the no-explanation group.

These results suggest that donors appreciate the window into how charities are selected, even when the curator is a clear expert in the space. And long explanations seem to engender confidence in donors without being distracting or cumbersome. If it is not feasible to present donors with a detailed methodology, a brief explanation is better than nothing. Donors reported that the short explanations reduced doubts and anticipated regret, suggesting that this signal of validation satisfied their desire for more information. Often, the simple assurance that some thought went into the options included in the list can be enough to prompt greater confidence and generosity.

4 Offer an option to donate to all

Paradoxically, a GiveList may make selecting a single charity more difficult since donors have to choose between similarly worthy organizations within the list. The result could be that potential donors avoid giving altogether or give less since their confidence in their selection is dampened. We wanted to explore whether this type of choice conflict existed and in what ways it could be impacting the effectiveness of our curated lists.

We looked into this further by running a test in which participants were shown the same GiveList, but with different donation options. Some were only allowed to donate to a single charity, while others had to choose to either give to all or none. In the latter condition, a donate-to-all button was offered to make giving across the list an easy, single action.

Comparing donation behaviors across the groups, **participants who were offered a donate-to-all option were 9% more likely to give than those who had to select a single charity.** And while overall donation amounts did not change significantly, donor satisfaction did improve. Those who could give to all in one click made their decisions more quickly and reported greater ease and confidence in their choice.

By eliminating the need to narrow down the list to the most-worthy charity, which adds another decision beyond deciding to give at all, the donate-to-all button simplifies the decision-making process. It also allows donors to diversify their donation among all the charities on the list, potentially freeing donors from wondering if they made the right choice or worrying that they may regret their choice in the future.

Findings from the Field

The GiveLists were produced to make it easy for individuals to confidently find and donate to effective charities. Theoretically, providing expert guidance to potential donors could streamline the giving process without sacrificing quality of choice or the satisfaction of giving.

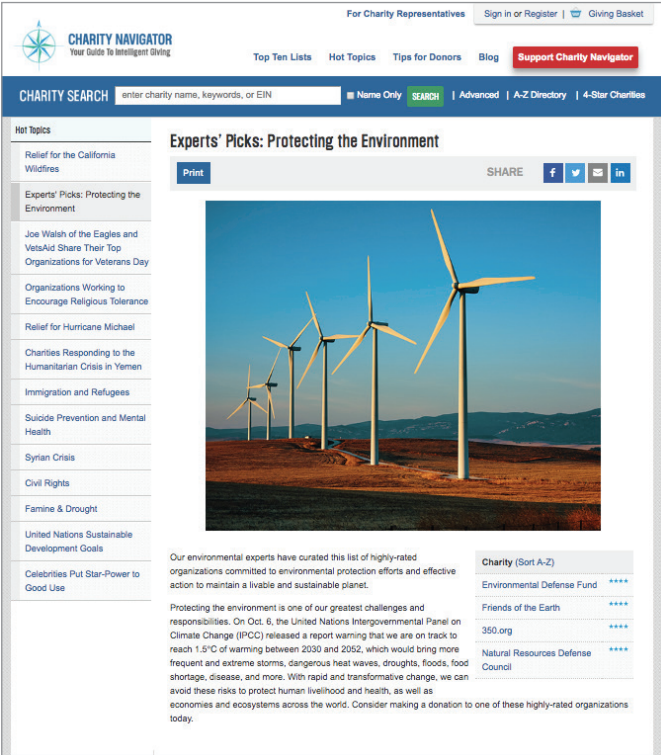
Over the two years of the GiveList pilot, we ran a series of experiments in the field with seven platform partners—including donor advised funds, workplace giving platforms, charity evaluation sites, and other online giving tools—to see how the lists performed in practice. In most cases, we implemented randomized control trials in which a random subset of users received a version of the GiveList, while others received a non-expertly curated alternative. This level of rigor allowed us to confidently determine how giving behaviors changes based on the GiveLists and specific underlying features.

The following lessons represent three consistent findings that emerged from these experiments. While we strive to draw definitive conclusions, we allow for nuances to more accurately capture the intricacies of donor behavior. Practitioners wishing to learn from these insights will hopefully benefit from this level of detail and be able to better adapt expert curation to their specific giving contexts.

GiveLists prompt more giving

In nearly every experiment, the GiveLists were delivered in two steps. First, users were presented with just the cause and curator of the list (or set of lists) on a landing page or email. If they were interested to learn more, they could click on an associated link to see the curated charities. The vast majority of users in our tests never got past the first step, which we will discuss more in a later section. But of those who went on to see the full GiveList, the average change in their giving behavior was significant and often large.

For those select donors, their donation rates and average gift amounts increased across our tests. Starting with donation rates, in several experiments, we saw that expert curation encouraged more giving—both in the number of donors as well as the number of charities an individual donor gave to. We were able to measure this increase by testing expertly



The screenshot shows the Charity Navigator website interface. At the top, there's a navigation bar with "For Charity Representatives", "Sign In or Register", and "Giving Basket". Below that, there are links for "Top Ten Lists", "Hot Topics", "Tips for Donors", "Blog", and "Support Charity Navigator". A search bar is prominently displayed with the text "CHARITY SEARCH" and a placeholder "enter charity name, keywords, or EIN". To the right of the search bar are filters for "Name Only", "SEARCH", "Advanced", "A-Z Directory", and "4-Star Charities".

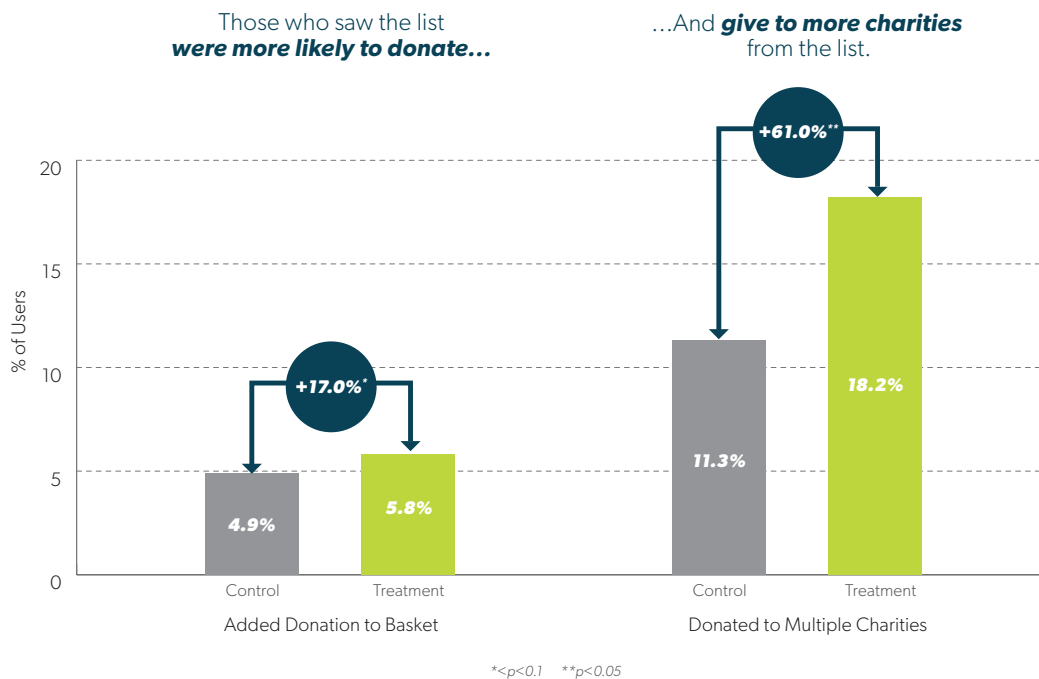
The main content area features a "Hot Topics" sidebar on the left with various categories like "Relief for the California Wildfires", "Experts' Picks: Protecting the Environment", "Joe Walsh of the Eagles and VetsAid Share Their Top Organizations for Veterans Day", etc. The main focus is on the "Experts' Picks: Protecting the Environment" section. It includes a "Print" button, a "SHARE" button with social media icons (Facebook, Twitter, LinkedIn), and a large image of wind turbines in a field. Below the image, there's a paragraph of text explaining the importance of environmental protection and a list of "Charity (Sort A-Z)" with four stars, including "Environmental Defense Fund", "Friends of the Earth", "350.org", and "Natural Resources Defense Council".

curated lists against identical lists that were presented without explicit curation (i.e., no expert and no selection criteria).

With Charity Navigator, for example, we added a “Protecting the Environment” list in their *Hot Topics* section, mentioning no curator for the control group and identifying generic experts for the treatment group (see figure on the right). This simple change in frame towards curation **increased donations by 17% and led to 61% of those donors giving to multiple organizations on the four-charity list.**

These results were reinforced during our tests with Benevity’s workplace giving platform, in which we offered employees guidance around eight cause areas. When a named curator was attached to the lists, donation rates jumped up. Those who clicked on a curated list made 3.1 donations on average compared to 2.4 donations for those who saw the same lists but with no associated expert.

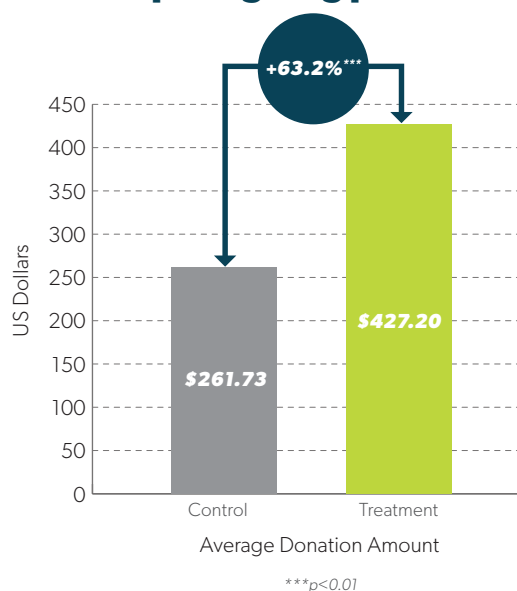
Donation rates increased in two ways (Charity Navigator)



Beyond the number of donations, the amount donors gave increased by remarkable margins in several of our experiments. In an earlier test with Charity Navigator, we offered a different list around child nutrition on their *Hot Topics* page. For our control group, the list included every 3- and 4-star organization working in the space, but for the treatment, the list was shortened through the explicit curation of a well-known foundation. Though engagement with the lists was low, among those who did donate, we captured gifts that were over twice as high in our treatment versus control (\$209 compared to \$98). Again, this finding was replicated in our experiment with Benevity, in which donation amounts among donors in the treatment group were **63% higher than those from the control group donors.**

These findings are a powerful endorsement for the GiveLists and their ability to encourage greater donor activity. Even after factoring in those donors who did not engage with the GiveList, the GiveList had, on balance, a net positive effect on giving. But these figures only highlight the changing giving patterns of those who engaged with the lists themselves. We needed to take a closer look at how people view the offer of curated guidance and whether the GiveLists have the appeal we expected. The following sections delve into these questions further.

Donation amounts on the workplace giving platform



Expert curators are a mixed bag

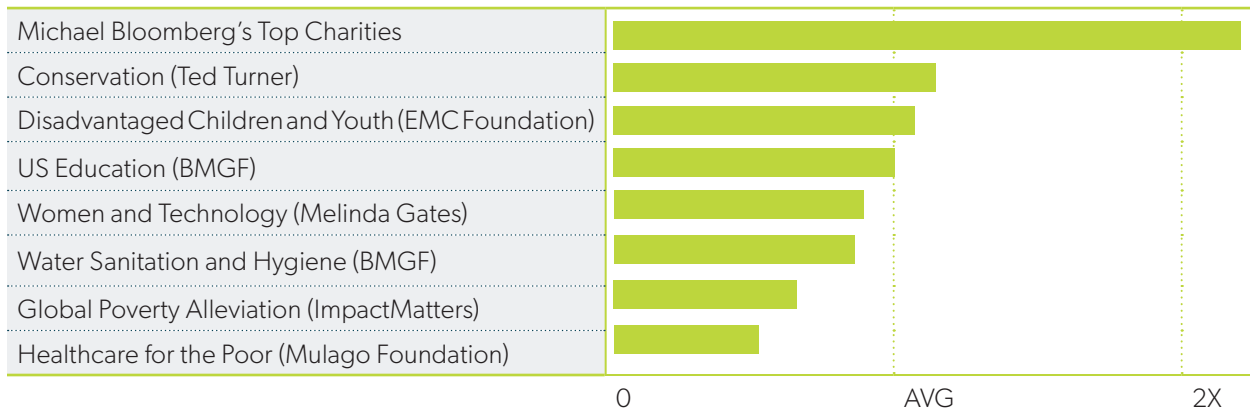
In our lab tests, we examined how different types of curators performed against each other. But those experiments took for granted a captive audience—our participants were compelled to view and react to the GiveLists we presented to them. In the real world, people have *limited attention* and may miss the guidance on offer even if they would sincerely find the information useful. To that end, we wanted to understand whether our expert curators offered the added benefit of attracting donor interest in an otherwise busy online environment.

To get a sense of how different curators performed on this dimension, we worked with a leading donor advised fund to create a landing page on which a series of GiveLists were previewed. The page had eight different lists, with a simple box for each that named the topic, the curator, and a one-line descriptor. If a list piqued a user’s interest, that user could click a link to download the full GiveList.

When the numbers came in, we found an intriguing trend: **when it came to grabbing attention, well-known names outperformed lists with specific cause areas or curators with more institutionalized expertise.** The most popular GiveList in our experiment, with more than twice the average the number of downloads, was from Michael Bloomberg—with Ted Turner’s list coming in second (see graph below). Both lists were presented in the middle of the page, but still received most of the attention. One hypothesis for this popularity is that the curator’s celebrity could be driving engagement, either because people are simply curious about their selections or because they have more faith in recommendations from a known name.

Interest in GiveLists on a DAF website

Download Rates



However, when we looked into the donations that followed from these lists, we learned that popularity is far from everything. Even though the Bloomberg list received the most attention, donation amounts to charities on the list were about a fifth of the average donation size across the GiveLists. In contrast, the charities on the US Education list received donations that were more than double the average. But the real winner was Ted Turner's Conservation list, which brought in more than four times the average. Perhaps because Turner is a well-known environmentalist or maybe because he is perceived as an aspirational peer to some DAF clients, he resonated well with this audience.

These results reinforce the fact that the curator matters. If potential donors are overlooking curated guidance on offer, then perhaps the right celebrity name could grab their attention. But the credibility of the curator as an expert should also be taken into account since **curiosity does not necessarily translate to generosity**. Of course, for some people, expert curation may not be the answer at all (regardless of the curator), which we detail further in the next section.

Curation is not for everyone

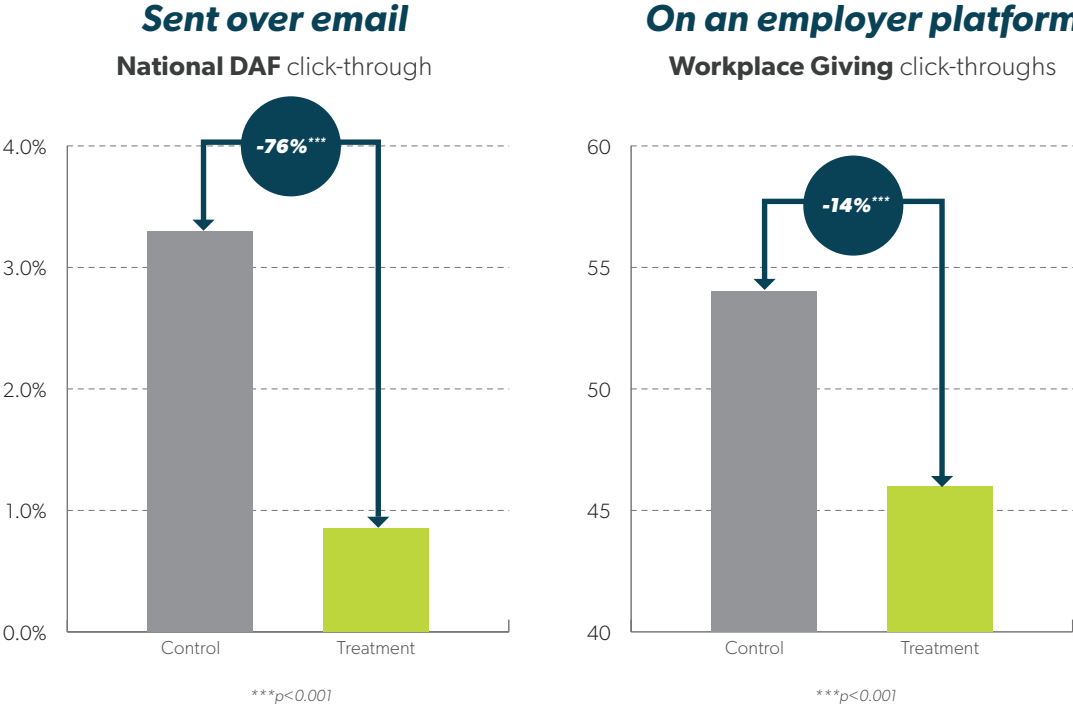
One of the challenges of any product is trying to figure out when to deliver it and to whom to ensure optimal use. With the GiveLists, we offered our curated guidance to a wide range of users at different moments of the donor journey, hoping to reach the right people at the right time. As we saw in the previous section, we clearly found donors who utilized the lists changed their giving behavior accordingly. But there were many more individuals who either ignored the information, or worse, were put off by it.

In all of our randomized experiments, we captured a series of engagement metrics to understand how the GiveLists were being received. While there was variation across the tests, one of the most consistent findings was the **presence of an expertly curated list reduced related user activity**. Revisiting our earliest experiment with Charity Navigator, though donation amounts were higher for the treatment group, the actual number of people who saw the charity list was 22% lower for those in the treatment versus the control.

Initially, we thought this depressed engagement was solely a function of the how the GiveList was presented (the curator name in the title made it harder to read than the other *Hot Topic* causes). But in fact, the lower engagement numbers persisted even with other experiments through different channels. For instance, with a national donor advised fund, we sent clients one of two emails. In one version, we highlighted three cause areas in broad terms and suggested that individuals consider making a grant to those causes. In the other version, we added GiveLists around those cause areas directly into the email, suggesting that recipients make a grant to one of the charities. Just from that change, we saw click-throughs plummet by 76% in the GiveList condition.

Similarly, in our workplace giving experiments, engagement dropped when employees were presented with explicitly curated lists. Notably, the overall effect of the GiveList was net positive, with total giving higher in our treatment group than the control group. However, the increase was driven by a smaller number of donors since 14% fewer people clicked on any of the eight cause areas when an expert was attached to them.

User engagement numbers through different channels



While we have not been able to tease out exactly what is behind the lower engagement numbers, we have some working theories. One possibility is that when a curator’s name is attached to the cause area, people have to evaluate not only how much they care about the cause area, but also how much they trust the curator. Needing to assess one additional piece of information can place a cognitive tax that may impede the split-second decision to click through to the GiveList.

Another possibility is that the curator's name may trigger associations that deter people from clicking through. In interviews with donors, a repeated critique of the wealthier curators is that they have enough money to support the charities on their lists. The additional gift from the individual donor may seem paltry or unnecessary. Other, more preference-based associations may also reduce the appeal of specific curators.

These results should not deter practitioners from providing curated lists, but instead, prompt more nuanced considerations for how they are presented. On balance, the GiveList had a positive net effect on giving. But given that some donors tended to disengage, we recommend that expert curation be one of several tools offered to donors. Those who respond positively to expert recommendations can use the GiveLists to inform giving decisions. But for others, they can self-select into alternative forms of guidance as long as they are easy to find and use.

Conclusion

GiveLists have proven to be a useful tool for providing guidance to donors, prompting more generosity, and likely, more effective giving. Curation simplifies the process of identifying worthy charities and the associated experts lend a level of credibility that often engenders confidence among donors who want to know that their donation dollars are being well spent. Through our experiments we were able to capture the magnitude of these influences on donor behavior and make an evidenced case for practitioners who wish to provide curation on their platforms.

However, we also captured meaningful nuances around how, when, and to whom expert curation should be presented. With our lab studies we tested and ranked specific features of the GiveList to optimize their impact. We found that donors appreciate some level of choice, but also the simplicity of donating to a package of charities on a list. In addition, we determined that explaining how organizations were selected matters to donors, but that the curator could be unnamed and still motivate giving.

Finally, in the field, we saw reports on engagement that gave us pause. On balance, even after factoring in disengaged donors, the GiveList had a net positive effect on giving. But while select donors found significant value in the GiveList, most either ignored the guidance or purposely avoided it. Using recognizable personalities as curators could help solve the attention problem, but it would not necessarily inspire more giving. And, on the whole, identified experts could actually deter people from viewing curated lists altogether. Ultimately, presenting curation as one of many forms of guidance could be the best option for capturing the benefits of the GiveLists without encountering the costs.

There is a good deal more to explore with curation and how it could be best applied in the giving space. Dynamic lists that incorporate the latest information or respond to current events could be a better tool for conscientious donors. Similarly, personalized or localized lists could offer more salient recommendations for those who seek bespoke guidance. We just scratched the surface in this report, but hopefully, the lessons we presented here provide a useful foundation for all innovations around curation to come.

