Building Better Giving Tools

Insights from new approaches to thoughtful giving

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About ideas42

We are a non-profit looking for deep insights into human behavior—why people do what they do—and using that knowledge in ways that help improve lives, build better systems, and drive social change. Working globally, we reinvent the practices of institutions, and create better products and policies that can be scaled for maximum impact.

We also teach others, ultimately striving to generate lasting social impact and create a future where the universal application of behavioral science powers a world with optimal health, equitable wealth, and environments and systems that are sustainable and just for all.

For more than a decade, we have been at the forefront of applying behavioral science in the real world. And as we've developed our expertise, we've helped to define an entire field. Our efforts have so far extended to 40 countries as we've partnered with governments, foundations, NGOs, private enterprises, and a wide array of public institutions—in short, anyone who wants to make a positive difference in people's lives.

Visit ideas42.org and follow @ideas42 on Twitter to learn more about our work.
Contact info@ideas42.org with questions.

HOW TO
USE THIS REPORT

This report is a guide for individuals and organizations in the philanthropic space who want to better support donors in making value-driven giving decisions. To that end, the report presents two novel giving tools—a ***subscription model*** and a ***personal giving review***—that reorient how donors engage with and discover giving opportunities. With proper design and development, these tools can be adapted and applied in a wide range of settings.

The following sections provide insights drawn from baseline research and pilot tests on the two different tools. From our research and pilot testing, we present findings on the desirability of these tools, user preferences for particular features, and whether (and how) the tools affect donor behavior and satisfaction with their giving. We then provide implementation recommendations for those interested in offering the tools to donors in their network and make suggestions for additional features to continually improve on donor outcomes.

SUBSCRIPTION MODEL

A recommendation generator that offers donors personalized, curated opportunities to discover and donate to new organizations.

- Research approach (page 7)
- Research insights (page 12)
- High level research takeaways (page 16)
- Recommendations for implementation (page 16)
- Recommendations for future research (page 18)

PERSONAL GIVING REVIEW

A tailored, behaviorally designed summary of a donor's past giving.

- Research approach (page 19)
- Research insights (page 24)
- High level research takeaways (page 28)
- Recommendations for implementation (page 28)
- Recommendations for future research (page 29)

Introduction

Across all types of philanthropy, one theme is constant: giving is personal. Most of us like to give to causes that resonate with us emotionally or move us to act urgently, like a disaster or direct appeal. But over the long term, where and how much we give may deviate significantly from our preferences. We may struggle to find the right organizations, give less than we initially intended, or forget to donate altogether. Often, because we have limited time, it may seem easier to quickly donate small amounts to organizations we know or are asked to support than to research organizations on our own and make decisions about whether to donate.

> **"I'll tend to gravitate towards "big name" charities (Red Cross, CARE, groups working with the UN). It feels pretty convenient to give, generally. I'd love to give to more local, community-based orgs but they are harder to learn about."**
>
> *–Donor interview*

This ad hoc style of giving can undermine our ability to optimize for impact and give to organizations that align most closely with our individual interests and values.

> **"I wish I had one passion. I kind of want to spread it around ... I'm not just looking in one [cause] anymore. I think what I'm going to do is pick half a dozen and try contributing to those."**
>
> *–Donor interview*

ideas42 explores innovative ways to help donors fulfill their intentions to give to organizations addressing issues they care about using behavioral science, or the study of how people make decisions and act in the real world. To this end, we have designed several easy-to-use tools intended to capture donors' attention and make thoughtful giving the norm. If widely implemented, these tools could increase donors' satisfaction with their giving, and ultimately, lead to more consistent and stronger support for non-profit organizations. In this report, we present two tools and share insights on how and why they could support donors in their giving. We think these tools, or elements of them, could be particularly impactful if incorporated into popular giving platforms that many donors already use.

The ***subscription model*** is a recommendation generator that offers donors personalized, curated opportunities to discover and donate to new organizations. Donors start by taking a quiz to learn about their giving identity and/or interests, and then they can sign up for periodic emails with information about non-profits that align with their preferences.

The ***personal giving review*** is a tailored, behaviorally designed summary of a donor's past giving. It includes several features to help donors reflect on their past generosity and align their future giving with their goals and values. It also prompts donors to consider how they will continue to give, how to give more thoughtfully, and how to act on these intentions.

Challenges to Giving Thoughtfully

The Charitable Giving team at ideas42 focuses on understanding and alleviating barriers donors face in changing their behavior to align their giving with their preferences and values. We have collected insights from interviews with donors and experts, online surveys, controlled experiments, and academic papers that examine donor psychology and behavior. Through these efforts, we found evidence that donors would like to give more[1] and approach their giving in a more thoughtful way by doing additional research[2] on where to give.

What keeps donors from giving the way they'd like? We identified a number of behavioral barriers that commonly stand in the way:

- Donors have ***limited attention.*** There is an abundance of information on different causes and organizations competing for donors' attention and dollars. Yet it can be hard to know what resources to use to find this information, and what specifically to look for in their research once they've found a reliable source. Additionally, there are countless organizations and causes to choose from, potentially leading donors to experience ***choice overload.***
- During interviews, many donors reported feeling ***brief moments of inspiration or generosity*** brought on by a solicitation from a friend or current events (such as a natural disaster or humanitarian crisis) that did not necessarily translate to sustained giving or budgeting for future charitable donations.
- Additionally, once someone donates, they receive minimal ***feedback.*** There isn't an easy way to track donations over the long-term to ensure their giving represents their interests and values, or even how much they have donated over time. Even if a donor tracks this information on their own, they may not know how to sustain support for causes important to them, or course-correct their future giving to match their interests more closely.
- Of course, donors will still feel that satisfying ***warm glow*** when they make a donation, even if they haven't given as much, or done as much due diligence, as they would ideally like.

Limited Attention

Humans' ability to pay attention to several things at once is limited. When attentional capacity is stretched—for instance, if we drive, listen to music, and text all at once—we are left effectively blind to information we would easily notice under normal circumstances.[3]

Choice Overload

Having too many options to choose from may lead to adverse consequences, such as a decrease in the motivation to choose or the satisfaction with the final choice.[4]

Warm Glow

A feeling of satisfaction for doing one's part to help others.[5]

Our goal for this project was to test two tools that could potentially aid donors in fulfilling their intentions around giving more, and more thoughtfully, without diminishing the emotional connections and reactions that compel donors to give in the first place, or the warm glow that comes after making a donation.

Our Research Approach

We sought to provide insights about the desirability and effectiveness of the subscription model and personal giving review tools and make recommendations for future implementation on giving platforms. To do this, we created a two-phased research approach.

First, we validated our assumptions about the utility and desirability of these tools through additional research. There were two components to this phase of research: interviews with everyday donors and two online controlled experiments.

We then synthesized our findings and identified aspects of the tools to pilot in the field. We recruited several giving platforms that were interested in building and piloting versions of these tools on their sites. Specifically, we set up pilots of the subscription model tool with Charity Navigator and Fidelity Charitable, and of the personal giving review with Pinkaloo and Fidelity Charitable. This phase also had two components: interviews with account holders from Fidelity Charitable and Pinkaloo to get their feedback on tool prototypes, and pilot tests of the tools with each platform.

Below, we share our findings for each phase and share more about how we adapted the designs for each platform to fit within their goals and technological and time constraints.

About our partners

Fidelity Charitable

Fidelity Charitable is a 501(c)(3) public charity, whose mission is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective. They help donors maximize their generosity through their donor-advised fund (DAF), called the Giving Account.

Charity Navigator

Charity Navigator provides donors with free access to data, tools, and resources to guide philanthropic decision-making. Through their ratings, non-profits are equipped with the non-profit sector's premier trust indicator and a powerful platform to raise awareness and funds. Charity Navigator's Giving Basket enables donors to support multiple non-profits in one convenient checkout.

Pinkaloo

Pinkaloo is a white label donor-advised fund focused on democratizing access to DAFs. Through their Modern Giving accounts, employers, community foundations, and retail banks empower their employees and customers to drive the most impact via their charitable giving.

BUILDING BETTER GIVING TOOLS

SUBSCRIPTION MODEL

About the Tool

The subscription model presents donors with personalized, vetted non-profits at a regular cadence, creating appealing giving opportunities that feel novel and relevant. Donors sign up for the subscription by completing a short online quiz to determine which causes and types of organizations they value, and then they are emailed periodic (weekly, monthly, or quarterly) recommendations tailored just for them. The tool removes the challenge donors face of finding organizations that align with their values and preferences by bringing customized giving opportunities straight to their inbox, creating a more satisfying and engaging donor experience that also increases generosity and impact.

Sketches of the types of questions that could be asked (top) and what a results page could look like (bottom).

The subscription model tool addresses the behavioral barriers to thoughtful giving in several key ways:

- The quiz ***captures donors' attention*** by offering a novel way to discover new organizations and learn about their own ***charitable giving identity.*** Quiz results could include preferred causes or types of organizations (such as grassroots organizations, long-established groups, or organizations that prioritize sharing impact data). Identifying causes and characteristics of non-profits that are important to a donor can bring components of the donor's giving identity to the forefront.
- Emails deliver ***curated, personalized recommendations*** that create moments of choice and action. They may also prolong feelings of warm glow by reminding donors of the organizations and causes they support.
- An automated donation process ***removes hassles*** by minimizing the steps needed to support organizations doing meaningful work. An easy-to-use account dashboard simplifies the process of adjusting donation amounts, cause and organization type preferences, and taking other actions like connecting with other donors (see next bullet). This automated donation process would default donors to donating each month. Alternatively, this tool could be implemented with an opt-in model, in which donors intentionally decide each month whether or not to donate to the suggested organization(s).
- There are also many possibilities for add-on features that platforms could implement, such as sharing donations on social media or providing collaborative donation opportunities, or providing ***heuristics*** (rules of thumb) for building a longer-term giving plan. Other potential features to add include offering impact reporting, and/or an option to have donations that are opted out of to go to a balance that can be used for future recommended organizations.

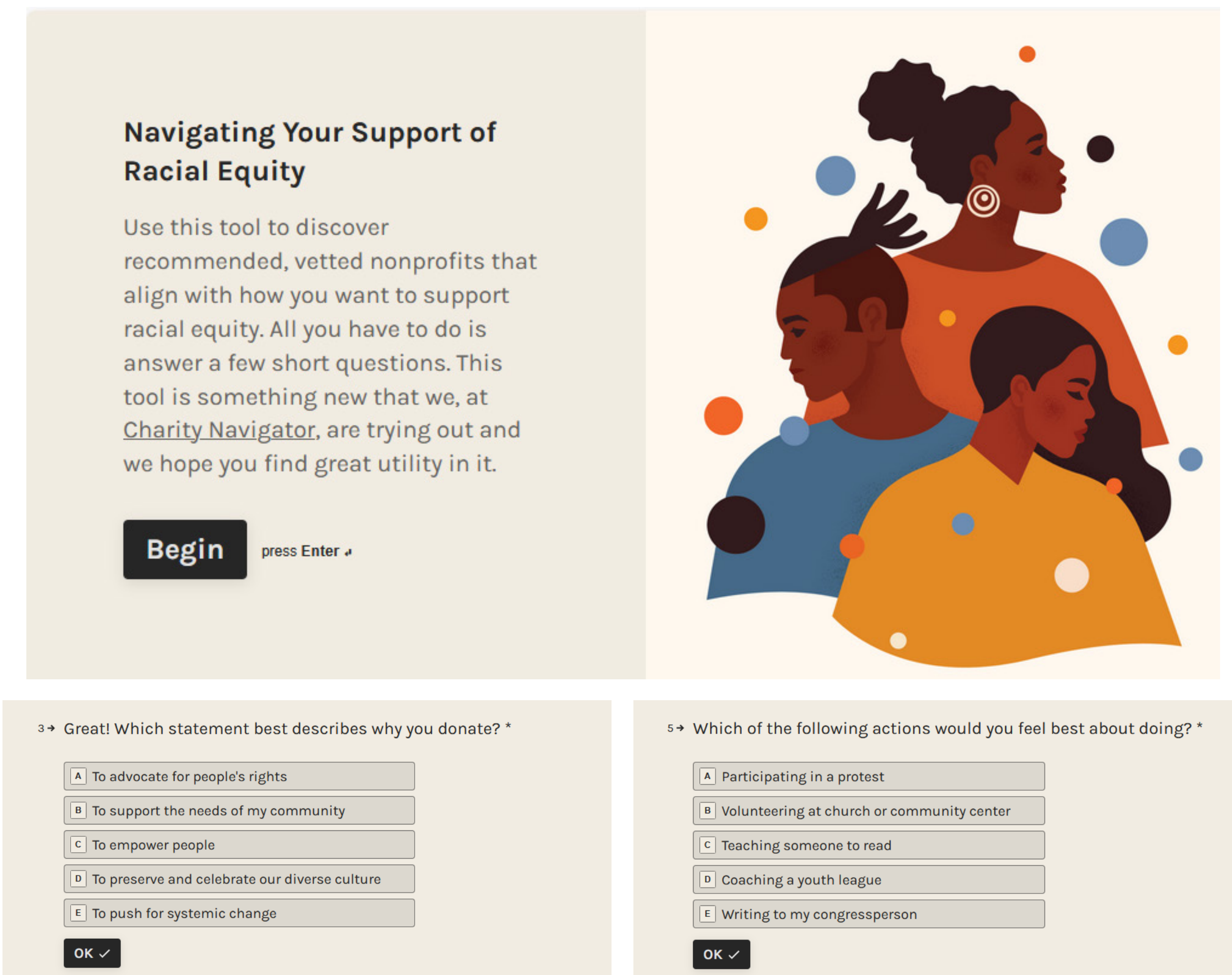
Research Phase 1: General Interviews and Lab Tests

Through interviews with everyday givers recruited through the Harvard Decision Science Lab in August 2020, we captured individuals' general attitudes about subscription programs, challenges they faced in discovering and selecting new non-profits, and preferences for particular features of the subscription tool. We also ran a controlled experiment through Qualtrics in November 2020 in which we simulated the subscription tool experience and tested whether participants would prefer an opt-in (taking action to donate each month) or opt-out (automatically donating each month) subscription model. We also used the online test as an opportunity to ask additional questions about giving behavior and gauge other preferences around tool features. We used our findings to inform the designs of the tools for the pilots and identify areas of future research.

Research Phase 2: Field Pilots

➤ *Charity Navigator "Navigating Your Support of Racial Equity" tool*

We partnered with Charity Navigator to evaluate the impact of one version of the subscription tool. The pilot ran from April-July 2021. The quiz questions and recommended non-profits were related to racial justice. Donors had the opportunity to take a quiz to identify one of five cause areas[6] that aligned with their preferences and then receive weekly non-profit recommendations based on their quiz results. Donors that did not want to take the quiz were able to simply select a cause area and then receive weekly recommendations. The tool was marketed through email campaigns and pop-up modals on the Charity Navigator website.

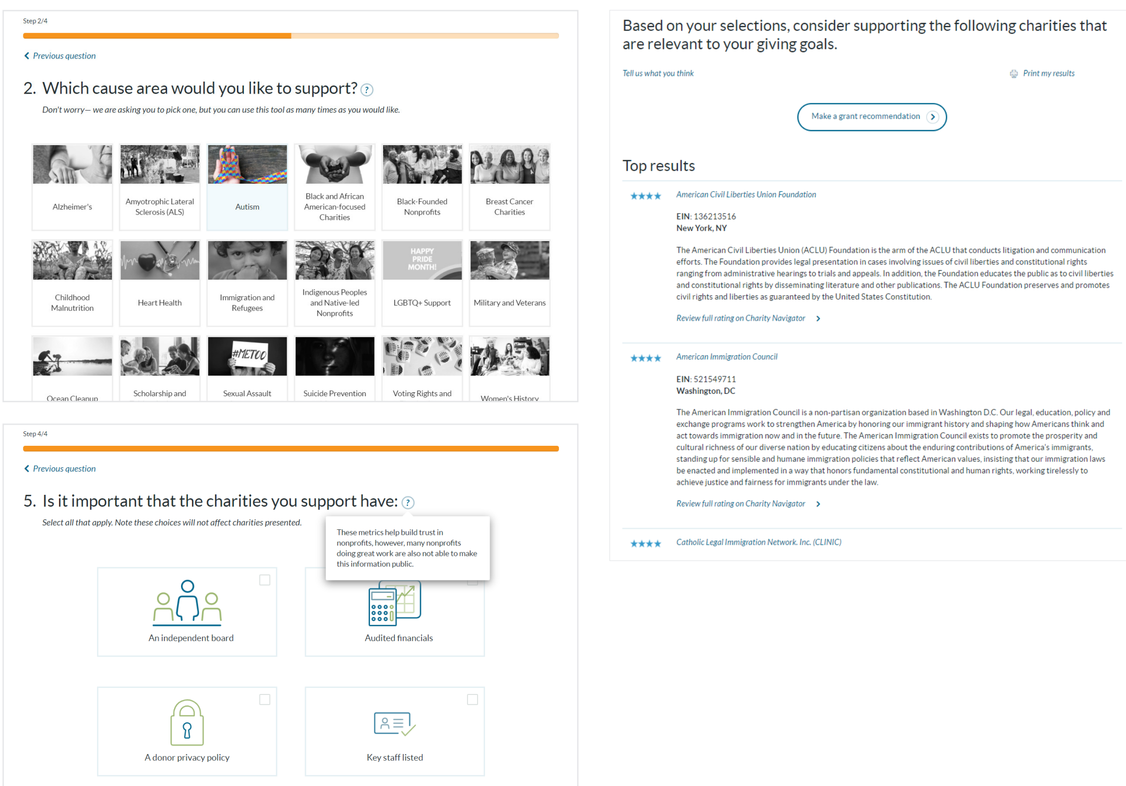


Images of the landing page and questions
from the Charity Navigator "Navigating Your Support of Racial Equity" tool.

➤ ***Fidelity Charitable Charity Matchmaker***

For our second pilot of our subscription model, we partnered with Fidelity Charitable. With the Fidelity Charitable team, we developed a Charity Matchmaker quiz that would be part of their Philanthropic Journey Guide, which is a resource hub for donors seeking to create a philanthropy strategy. The quiz asked donors questions about what non-profit characteristics matter to them (such as cause area, non-profit age and budget size, and transparency metrics). The result of the quiz was a personalized list of non-profits, including a brief description of each organization, that met the criteria donors specified. Donors didn't receive any follow up emails with recommendations. From the results page, donors had the opportunity to print the list, click to log into their Fidelity Charitable Donor Advised Fund account, and/or provide feedback on the quiz through a short survey.

Fidelity Charitable partnered with Charity Navigator to use Charity Navigator's API to generate quiz results. Organizations recommended at the end of the quiz were sourced from Charity Navigator's Hot Topics lists, which only feature organizations that have received a three- or four-star rating from Charity Navigator. In addition to being publicly available on the Fidelity Charitable website, Fidelity Charitable marketed the tool through an email campaign in July 2021.



Images of the Fidelity Charitable Charity Matchmaker quiz. Donors were guided by explainer boxes on each question, and presented with a results page at the end of the quiz.

What we learned

Capturing attention

➤ ***Donors were interested in the tool, and a test version elicited positive feedback and satisfaction with donations***

Overall, the concept of a personalized giving quiz and subscription was well received in our foundational research, with 74%[7] of our online controlled experiment participants rating the concept as "somewhat" or "extremely" positive, and 40%[8] saying there was nothing they disliked about the concept. Online test participants expressed an interest in a fun, personalized giving experience. In the open response portion of the test, participants reinforced that they hoped the tool would make the giving experience more fun, interesting, easy, and personalized.

> **"I loved that it matched me with charities I would be interested in."**
>
> *–Donor interview*

We also received positive feedback about the Charity Navigator tool during our pilot. Half of the donors that completed a post-pilot survey[9] said they felt like the tool contributed to their ability to make an impact, and a little over half (51%) of those who responded to our survey were very or extremely likely to recommend the tool to a friend.

Donors who participated in the Charity Navigator pilot also reported high levels of satisfaction with their donations. They said they discovered new organizations by using the tool, and that the tool helped them give in value-aligned ways:

- Of those who donated during the pilot period and responded to an optional, add-on section of our survey,[10] 94% said they were very or extremely satisfied with their donations.
- The majority (72%) of the pilot participants who completed our survey felt the tool introduced them to new non-profits, and 61% of those who donated and completed the survey[11] said they donated to an organization that was new to them.
- Of the pilot participants who completed our survey and made a donation,[12] 74% said their donations were aligned with their values and interests. Additionally, donors who took the quiz rated the alignment of their donations to their values statistically significantly higher than those who only selected a cause area and received recommendations.[13]

- ***Certain points of the donor journey may be particularly ripe for a tool like the subscription model***

  In our first phase of research, we also took a closer look in our online test at whether subsets of our online controlled experiment population were more or less interested in the tool based on how long they had been giving, and by how much they had given in the last year.

  - **This tool may be particularly useful for donors who are actively looking for organizations to donate to:** Of the participants who indicated that they were interested in signing up for the tool, 58% said they were currently looking for new non-profits to donate to. We found that the difference in interest between these participants, who were actively in "discovery mode," and those who did not indicate that they were searching for new organizations to support, was statistically significant.[14] This tool could meet the needs around discovery and validation for donors who may be having trouble selecting organizations to support. In our interviews, five of the eleven individuals we spoke with noted that they faced challenges in selecting organizations to donate to, for several reasons, including having too many options (choice overload), not knowing how to find organizations working on causes of interest beyond the "big names," or difficulty in narrowing down a particular cause.

> **"There [are] too many [charities]. Hard to find the time and resources to ultimately be involved in all of them."**
>
> *–Donor interview*

  - **This tool is appealing to donors regardless of their giving tenure or their stated satisfaction with their giving:** We didn't see statistically significant differences in interest in signing up for the tool in our online controlled experiment based on a participant's stated satisfaction with their giving, or based on how long they had been donating money to charitable organizations. This suggests that this tool could be appealing across different types of donor profiles.
  - **Adding an option to share one's donations through social media could be a popular way to engage others in a donor's network:** Five of our 11 interviewees reported publicly sharing their charitable donations in some way, at least some of the time. In our online test, the vast majority (97%[15]) of participants said they would share their subscription sign-up or donation selections publicly, privately or both, and 68%[16] of all participants said they would share this information publicly. The top motivation that participants cited for sharing was to influence others to donate.

➤ *Preferences on automated donations varied and will likely depend on the tool's audience*

In our first phase of research, we did not see as much consistency when it came to preferences about a key component of the tool: automated donations. During our general research interviews, nine of our eleven interviewees noted that they did not have any automated recurring donations to a non-profit set up, as they preferred to have more control and flexibility over their finances.

> **I like the flexibility [of not having subscriptions]. I'm not certain of my financial responsibilities ... This year, food security is the [cause] on my mind most. I'm glad I didn't overcommit to giving to another organization earlier in the year that may need my donation less."**
>
> *–Donor interview*

Because of this feedback, we homed in on testing preferences around automated features in our online test, since we viewed it as a key component of the tool. To test whether most people would have a preference for the opt-in when presented with the option to sign up for it, we simulated the subscription model by having all participants take a quiz, and then presented them with an overview of the subscription model that described either the opt-in or the opt-out models. When comparing the sign-up rates for these two versions, we did not see any statistically significant differences, suggesting that there was no strong preference for one version over the other.

➤ *Feedback from donors confirmed that this type of quiz could fill a gap for donors in discovery mode and wanting to search based on specific parameters*

Through survey feedback from our Fidelity Charitable pilot, half of the donors who responded[17] noted that they would have liked a question about the geography an organization serves. We also received this feedback from several survey respondents in our Charity Navigator post-pilot survey. Additionally, engagement metrics and donor feedback from our Fidelity Charitable pilot indicate that donors were interested in using the Fidelity Charitable quiz across a wide variety of cause areas—participants selected 34 different cause areas through the quiz, and in the survey feedback noted that there were additional causes that they would be interested in seeing as options.

Offering curated, personalized recommendations

➤ ***The prospect of personalized recommendations captured donors' attention***

We found that the prospect of receiving personalized recommendations (through the quiz or by just selecting a cause) really captured people's attention and led to a sharp spike in donation behavior. Through our Charity Navigator pilot, individuals were 6.2 times more likely[18] to donate immediately[19] after using our tool compared to prior. They also made seven times more donations per day[20] and gave 4.5 times more dollars overall.[21] Given that there were not similar donation spikes associated with other emails sent by Charity Navigator on similar topics (e.g. a Black History month-themed email in February 2021), it is likely that the change is driven by the tool itself.

The quiz itself also proved to be popular, with 80% of the pilot participants who clicked through to the tool opting to take the quiz rather than just selecting a cause and seeing the recommended organizations.

Removing hassles

➤ ***The way recommendations are delivered over time may change donation behavior***

When looking at the delivery of recommendations in our Charity Navigator pilot, we did not find any statistically significant differences in donation behavior between donors who received recommendation emails of differing frequencies and with different numbers of recommendations. Some donors received a new non-profit recommendation each week for five weeks via email, other donors received the same list of five non-profits via email each week, and a third group of donors only received one email immediately after taking the quiz with all five non-profit recommendations.

When we looked at donations specifically to the recommended organizations, we did see differences in donation behavior between the two groups that received recommendations over time. When looking only at donations made to recommended non-profits, we found that individuals who received one new non-profit recommendation per email[22] made twice the number of donations and made donations that were 171% higher[23] compared to individuals receiving emails that included all five non-profit recommendations in every email.[24] This aligns with our hypothesis that metering out the recommendations may add some novelty and/or discovery aspect and engages donors in their search process.

- ***Reducing hassles by integrating the quiz recommendations with a donor advised fund (DAF) account may boost follow through to make a grant***

  The most common action that donors took after completing the Fidelity Charitable quiz was to click to log into their Fidelity Charitable DAF account.[25] Making the donation process more seamless, in this case by eliminating the step of needing to log in and re-enter the non-profit's information to make a donation, could be a way for donors to more easily channel their moments of discovery into actions.

Overall takeaways

Our testing and pilot results and donor feedback through both phases of research led to a number of promising findings about this tool:

- ***The subscription model seems to fill a need for personalized non-profit recommendations, particularly at moments of discovery.*** Throughout our general research phase and through our pilots, we learned that there is indeed interest from donors to engage with a discovery tool like the subscription model to learn about charitable organizations.
- ***The tool is an engaging way to boost donor satisfaction*** and could contribute to increased giving in the short-term at the very least.
- ***Donors indicated interest in dynamic recommendations across multiple cause areas,*** but we didn't have the capacity to build that.
- Due to timing and technical capacity constraints, we don't have a clear picture of how a tool like this would be successful at ***promoting lasting engagement and donation activity,*** particularly whether the tool helped donors develop a giving identity, and whether an opt-in or opt-out model would be more successful at sustaining donations.

Recommendations for implementation

1 Reach donors during periods of discovery

As mentioned above, reaching donors during their discovery phase could help fill a need when they are researching charitable organizations. Such moments of discovery could include current events, such as natural disasters, public health events, or social justice movements. Other key moments of discovery may occur at specific times of year, like the beginning of the year or when tax refunds are issued as a moment to consider charitable uses for their refunds. Some donors may become interested in learning more about a particular cause after hearing about it through a family member or friend, or through other news media, books, or events. These types of moments of discovery could occur at any point in the year.

2 Determine your target audience

In terms of a particular target audience, this type of quiz and subscription could provide value for donors with varying degrees of experience making charitable gifts, and different levels of satisfaction with their giving.

3 Leverage social connections to increase impact

Our first-phase interviewees noted that they have publicly shared previous donations on social media, and the Fidelity Charitable donors we interviewed also noted that they like to talk about causes and organizations that matter to them with their family and friends. There are a number of potential social elements that could be added to the tool, such as:

- Providing opportunities for donors to share their subscription model donations on social media or through a forwardable email digest
- Creating a social network within the subscription model dashboard in which donors can share recommendations and learn which organizations their connections support.

4 Make the donation process easy, and ideally automated

For an opt-in model, setting up a user experience where donors can easily follow through on donating to their recommended organization(s) can encourage sustained engagement with this tool. For example, adding email links that go directly to a pre-populated donation page would help reduce hassles for donors trying to support the recommended organizations. If the model is automated, in which donors sign up to donate each month unless they opt out, then offering an account dashboard where donors can easily modify the amounts of their donations, or opt out of a donation, will help facilitate a smoother experience and address some of the concerns we heard in our research interviews about lacking control over automated donations and subscriptions.

5 Iterate with your target audience to determine preferred cause areas and criteria

Different audiences may have unique preferences for the types of questions included in the quiz. For example, in our Charity Navigator pilot, we included a catch-all/grab bag category in case a donor's quiz answers did not place them neatly in a cause area. This category did not end up being utilized much—99% of our pilot participants ended up in one of the cause area categories. In addition, we received feedback that a question about geographic preferences for giving would be useful.

Recommendations for future research

Because of flexibility of this design, there are several other features that could be tested further through qualitative and quantitative research. Some of our top priorities for future testing are:

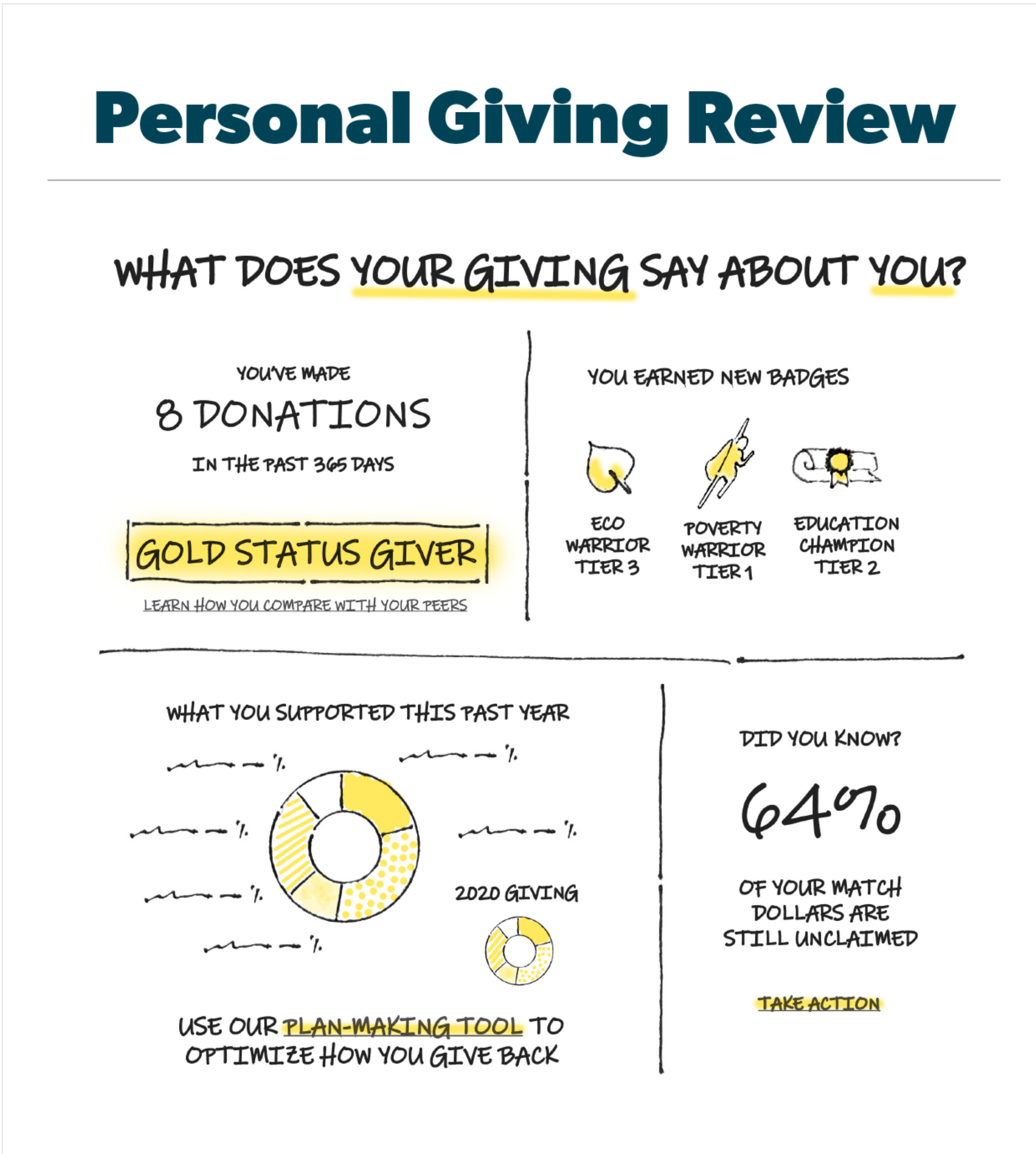
1. Testing an ***opt-out model*** where donors subscribe and make automated donations to the recommended organizations over a period of several months
2. Testing a model that provides ***monthly recommendations.*** Due to timing and technical constraints, our pilots offered weekly or one-time recommendations, respectively.
3. Testing ways to ***sustain donor attention*** through additional calls to action, such as social elements, plan-making, or feedback about their donations' impact after several months of participation.
4. Testing ways for donors to ***save or pause their donations*** and make larger gifts (of their accumulated paused donations) at a later date, such as the end of the year.
5. Testing whether donors learn more about, or acquire a new, ***donor identity*** through participation in the program—such as discovering new causes or types of organizations they are interested in, or thinking of themselves as a donor dedicated to a particular cause. Developing this type of identity could help sustain donor engagement and/or help donors discern what types of organizations and causes they'd like to support in the future.

BUILDING BETTER GIVING TOOLS

PERSONAL GIVING REVIEW

About the Tool

The personal giving review is a summary of a donor's past giving. It includes several features to help donors reflect on their giving and align their future donations with their goals and values, presenting giving behavior as a reflection of their philanthropic identity. It provides prompts for donors to think about how they want to continue to give, give more thoughtfully, and how to act on these intentions. The design is flexible, with customizable elements to resonate most with different donor audiences, and the information can be delivered by email and/or through an online platform's account dashboard.



Sketch of a personal giving review email that includes examples of different types of feedback mechanisms that could be included.

The personal giving review tool addresses behavioral barriers to thoughtful giving in several key ways:

- It ***captures attention*** by providing a holistic picture of overall giving to place giving decisions into a more complete context and offering novel, personalized metrics.
- A donor's ***identity*** is highlighted by making their philanthropic priorities visible based on their past giving. Through this comprehensive overview, donors may be made aware that their giving activity may not line up with their true preferences and intentions.
- It reminds donors of past giving, even if not totally aligned with their values, and retriggers feelings of ***warm glow.***
- ***It simplifies actions and removes hassles*** by offering opportunities for thoughtful giving actions (e.g. goal setting, making another donation, or searching for non-profits) at a moment when the donor is paying attention to their giving.

We underwent several research activities to learn more about donor preferences and to refine the tool. Below we'll describe each initiative and then summarize our takeaways from our research.

Research Phase 1: General interviews and lab tests

For our personal giving review research, we sought to understand how interviewees and online test participants research and select organizations to donate to, if and how they track their current giving, and what types of feedback about their giving they would be interested in learning. We asked these questions during our everyday donor interviews in August 2020 and our Qualtrics online test in November 2020. Through the online test, we also presented different versions of the personal giving review that framed charitable giving feedback in different ways and asked participants for feedback in order to understand preferences between different feedback mechanisms. We used our findings to inform the designs of the tools for the pilots and identify areas of future research.

Research Phase 2: Pilots

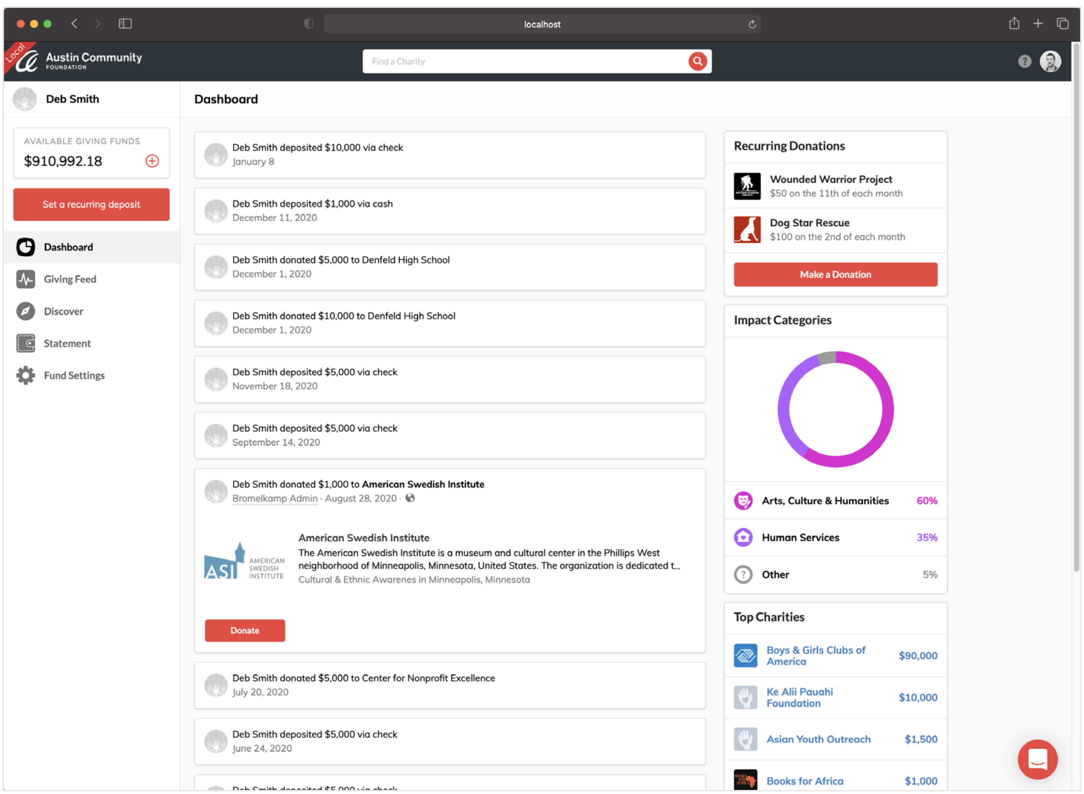
➤ *Fidelity Charitable Email Pilot*

Fidelity Charitable was interested in exploring the personal giving review by providing feedback to donors on giving in a specific cause area. We selected environmental causes as our area of focus and created an email pilot that primed donors' identities as environmental givers, provided feedback on their giving through social benchmarking (in this case, comparing their giving to others at Fidelity Charitable), and reminded them of organizations they had granted to in the previous year. This email pilot was delivered in May 2021.

Example email that donors in the personalized feedback group received.
It includes customized social benchmarking, organizations the recipient previously supported, and resources to learn about other environmentally-focused non-profits.

➤ *Pinkaloo Dashboard Pilot*

Starting in October of 2020, we worked with Pinkaloo to adapt our personal giving review concept to their platform. Specifically, we explored leveraging the personal giving review in an end-of-year email report form, an account dashboard form, and an interactive "year-in-review" form. Ultimately we chose to incorporate the personal giving review concept into a new account dashboard, rather than providing it as a separate page or email. We then conducted further concept tests with Pinkaloo account holders to refine the visual elements, test for comprehension, and probe for how Pinkaloo account holders might respond to a new dashboard. In February of 2021, Pinkaloo launched the new account dashboard, which prominently featured elements of the personal giving review.



Pinkaloo account holders are directed to their Fund Dashboard page after logging in. The dashboard includes a giving history feed and elements of personal giving on the right-hand side.

What we learned

Capturing attention

- ***The design was well received, particularly by certain subgroups***

  In our online controlled experiment and general interviews, participants indicated a high level of interest in the personal giving review. Nearly three-quarters of participants in our online test had a positive reaction to the tool, and 67% found the tool relevant to them personally.[26] When we explored whether there were different reactions to the personal giving review concept based on participants' giving attitudes and behaviors, we found that, interestingly, people who reported giving and being satisfied with their giving liked the personal giving review concept more than other segments.[27] Furthermore, when we segmented our results by self-reported giving regularity, we found that those who claimed to give "regularly" liked the personal giving review concept most, relative to those who report giving "occasionally or infrequently" or those who report giving "never or almost never."[28]

- ***Without a specific prompt to look at the personal giving review elements on a dashboard, these features were largely left unused***

  Of the engagements that we analyzed through our Pinkaloo pilot, account holders primarily logged into their dashboards to make grants to non-profits, and did not take the time to click around the site and explore other features. Marketing the personal giving review reports through an email campaign would likely generate more curiosity about insights into account holders' giving.

Activating donor identity

- ***Offer meaningful benchmarks can help contextualize giving***

  Through our general interviews, we learned that donors value benchmarks for how their giving fits into a bigger picture. Potential benchmarks could be individual, such as how a donor's giving stacks up to their own previous giving, their giving goals, or the impact they've made through their donations.

  Through our interviews with Fidelity Charitable and Pinkaloo donors, we learned that year-over-year comparisons of a donor's giving activity was a useful frame for feedback. Additionally, other interviewees indicated that sharing their progress toward their personal giving goals would be valuable; they felt there was room for more direct alignment between their values and their charitable giving activity.

> "The causes I care about probably are reflective, but it's probably not a full picture because I don't have the money to give to everything I care about. But I've prioritized what I care about the most."
>
> *–Donor interview*

> "[Yes, my giving aligns with my values and identity, but] there are things that I value that I don't regularly give to."
>
> *–Donor interview*

In our general interviews, nine of our eleven interviewees shared that they cared deeply about their donations making an impact and advancing an organization's mission. Providing feedback that shows how a donor's dollars have advanced a cause could help donors become more in tune to their giving activity.

> "Most [of the charities we give to] are smaller, lesser known charities that don't have as much overhead. If you're going to give money away, then [you] want to go towards the thing you're trying to address rather than administrative costs."
>
> *–Donor interview*

> "I try to contribute when the need is specific and explicit."
>
> *–Donor interview*

Social benchmarking (sharing how donors' activity compares to others') is another potential approach for putting personal giving into the bigger picture, but we received mixed feedback on its desirability during our interviews and online test. In the online test, it was one of the least selected metrics that participants said they would be interested in seeing. In interviews with Pinkaloo and Fidelity Charitable donors, interviewees also had mixed feelings about social benchmarking, and for some it raised concerns about privacy and data sharing. Social benchmarking may be a desirable tool for some subset of donors, and merits further research and exploration as a feature of the personal giving review.

➤ *Donors seek some nuance in their feedback*

Pinkaloo interviewees noted that they'd like to see more detailed breakdowns of their giving than just by cause area. For example, more nuanced categories, such as "cancer research" rather than a broad "health" category, might help trigger a more accurate donor identity for people viewing the personal giving review. Interviewees also noted that they'd like to see their donations segmented by geography (local, domestic, and international organizations).

Triggering warm glow

➤ *Personalized feedback on a specific cause area can motivate donors to support that cause*

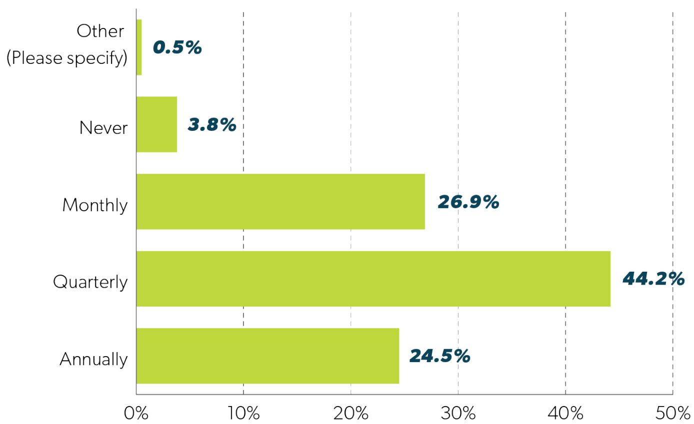
Through our Fidelity Charitable email pilot, we provided targeted feedback on giving in a certain cause area (in this case, the environment). This approach proved to be an effective mechanism for encouraging more donors to make donations to this cause. We found that a statistically significantly higher proportion of donors who received the emails with personalized feedback about their environmental giving made a grant[29] to an environmental non-profit during the 30 days after the emails were sent, compared to those that received an email about environmental giving without personalized feedback.[30] We did not see any statistically significant differences in the number of grants made, or the mean grant amount.

Simplifying actions and removing hassles

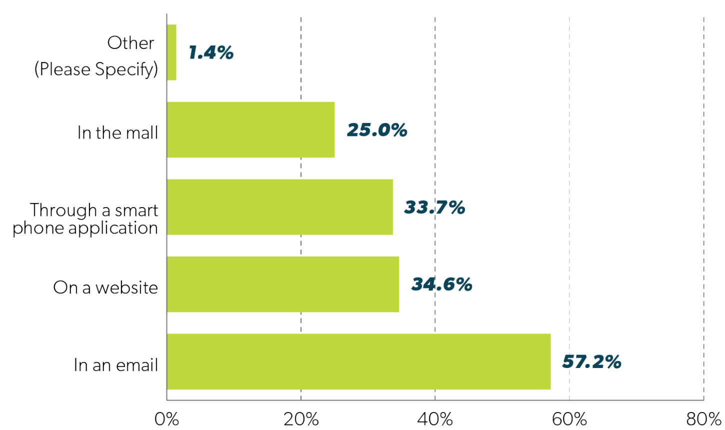
➤ *When it comes to delivery channel and frequency, participants preferred quarterly email reviews*

When participants in our online controlled experiment were asked about ideal features of the personal giving review tool, such as how they would want the tool delivered to them or what sort of information they would want included in it, we found that participants preferred to receive a personal giving review via email over other options, like through a website or mobile application. Participants generally preferred to receive a quarterly personal giving review email containing the total amount they donated, the non-profits and causes they donated to, and opportunities to make another donation to a non-profit they have supported before.

Q: If you received a Personal Giving Review, how often might you want to receive it?



Q: If you received a Personal Giving Review, how might you like to receive it? (Please select all that apply)



These points echo what we learned in our general interviews, as well. Interviewees expressed preferences for some of these more “traditional” forms of feedback.

> **“It would be interesting to have a summary report broken down by cause area, nicely formatted. And impact made, how much matches, how much a campaign raised.”**
>
> *–Donor interview*

> **“It would be helpful to know how much I’ve given. Something like how your credit card gives you a pie chart breaking down the categories of your spending, something like that for giving by cause area would be interesting to know.”**
>
> *–Donor interview*

This feedback from our online test participants and interviewees made clear to us that it would be important to include data views and feedback in the personal giving review that align with donor mental models, or how they are already thinking about their giving. Data should be presented in a visually compelling way for people to engage with, and understand changes to, their giving and easily take action.

➤ *Donors expressed interest in calls to action that encourage more intentional giving*

In our online test, we asked participants which calls to action they would be most interested in seeing in their personal giving review. The top two selected options were making donations to a non-profit they’ve previously supported and searching for new organizations. Participants were less interested in gamification or social features.

Pinkaloo account holders provided useful feedback on which calls to action they would be most interested in seeing included in the personal giving review. For example, they reported that a link to make one-off additional donations was not enough, and that they would like to have the capability within their Pinkaloo account to make a giving plan.

Overall takeaways

- ***The personal giving review fills a need.*** Through both phases of research we found that donors are interested in receiving feedback on their giving and seeing how their donation activity aligns with their values.
- ***The personal giving review should be delivered strategically.*** Email was the preferred channel for the personal giving review among our online test participants, and we saw in our Pinkaloo dashboard pilot that there was not much engagement with the personal giving review components without a prompt that could direct donors' attention to the tool. Targeted email marketing delivered at key points throughout the year would likely be the most effective way to capture donors' attention. Strategic time periods could be Giving Tuesday, tax season, or the end of the calendar year.
- ***The personal giving review can have some influence on donation activity.*** A higher proportion of account holders in our Fidelity Charitable pilot made donations to environmental charities after receiving the personal giving review emails—a sign that the personalized feedback inspired more people to make donations to environmental non-profits. Additional refinement to the language and calls to action could spark additional generosity.
- ***Additional fine tuning is needed to determine the preferred types of feedback and calls to action.*** We received input throughout our research about the types of feedback donors would like to see included in the personal giving review. Identifying the most resonant types of benchmarking, level of detail in the feedback provided on giving activity, and suggested calls to action will require additional testing and input from the donors receiving the personal giving review.

Recommendations for implementation

1 Survey your donors about preferred timing and delivery channels

Participants in our online controlled experiment noted that quarterly emails would be their most preferred frequency and delivery channel for a personal giving review. We also saw low engagement with the personal giving review dashboard on the Pinkaloo website when it launched in the middle of 2021, which could be due to the dashboard not being accompanied by emails to capture donors' attention. The beginning or end of the year, or other important touchpoints, like Giving Tuesday, could be strategic times to send personal giving review emails.

2 Build a robust dataset in order to provide nuanced feedback

Based on the feedback we received from donors who participated in our pilots, more in-depth feedback, such as geographies served or more precise cause areas, is desired.

Platforms may need to build out more detailed, expansive databases to be able to provide these nuanced data views. Additionally, if a platform is interested in learning whether the personal giving review is influencing donor behavior, being able to connect email engagement activity with donation transactions is another important data capability.

3 Adapt the personal giving review components to suit your donor population

Our online test results indicated that more experienced donors may be more interested in a personal giving review tool. This is likely true of a more generalized personal giving review tool that provides feedback on many cause areas. However, we found that the Fidelity Charitable donors we interviewed after our pilot already identified as supporters of environmental organizations, and receiving the personal giving review email did not influence their desire to continue giving to environmental causes (because they would continue to give to these types of organizations regardless). Further testing to determine the impact the personal giving review has on actual giving behavior can help to clarify whether particular audiences may be more receptive to this type of feedback.

Recommendations for future research

Through our research and tests, we uncovered several components of this highly adaptable feature that merit additional testing for different donor audiences:

1. Testing different types of ***personal and social benchmarks*** to determine which comparison points spark donor engagement.
2. Testing ***additional types of feedback*** about giving (beyond benchmarks, identity framing, and basic feedback about causes).
3. Testing ***additional calls to action,*** such as setting up recurring donations, making a giving plan, or providing reminders to stick to a giving plan.
4. Testing ***additional segmentation*** of a test population to see if particular groups (e.g. newer or longer tenured donors, donors with fewer or more donations) are more engaged with their feedback.
5. Testing to ***compare engagement*** with a more general personal giving review vs a personal giving review focused on a particular cause area.
6. Testing ***different frequencies of updates*** to the personal giving review. Due to time constraints, we were not able to provide multiple updates to the personal giving review.
7. Additional testing to ***understand if and how the personal giving review changes donation behavior and donor satisfaction.***

What's Next

Our nearly 18-month project yielded many promising insights about both the subscription model and personal giving review designs, particularly in how they can help to capture donor attention, boost donor satisfaction with their giving, and increase generosity. There is clearly evidence that these tools can provide utility to donors who are seeking to align their giving with their values and preferences.

Many of our recommendations for future research are related to building more robust versions of these tests, and how to sustain donors' attention using these tools, since we were not able to execute full implementations of these tools in the timeframe of our project. Longer term implementations, with more robust built-in design features, would allow for more testing of outcomes over months (or even years) and the opportunity to fine tune the features of both of these tools.

The Charitable Giving team at ideas42 is eager to collaborate with platforms that are interested in testing these designs, or others, to scale successful designs and develop new insights that help donors follow through on their generous intentions and maximizing their social impact.

Technical Appendix

Below we have included details about how we designed and implemented our online controlled experiments, general interviews, and platform pilots.

Research Phase 1: General Interviews and Lab Tests

We validated our assumptions about the utility and desirability of these tools through research with more general audiences and without the specific context or constraint of a particular giving platform. There were two components to this phase of research: interviews with everyday donors and two online controlled experiments.

1. In August 2020, we conducted 11 interviews with individuals recruited through the Harvard Decision Science Lab to understand general attitudes about giving, if and how they had changed as a result of the COVID-19 pandemic, and preferences around some features for each of the tools. We conducted these interviews over Zoom.
2. In the fall and winter of 2020, we did two controlled online experiments (one for each tool) using Qualtrics research panels. We used these experiments to understand the desirability of the tools for a general (platform agnostic) audience, and conducted A/B tests for different framings and features of each tool.

We synthesized our findings from these research activities and identified aspects of the tools that we wanted to test in the field.

Research Phase 2: Pilot tests

We recruited several giving platforms who were interested in building and piloting versions of these tools on their sites. Specifically, we set up pilots of the subscription model tool with Charity Navigator and Fidelity Charitable, and of the personal giving review with Pinkaloo and Fidelity Charitable. This phase also had two components: interviews with account holders from Fidelity Charitable and Pinkaloo account holders to get their feedback on tool prototypes, and pilot tests of the tools with each platform.

1. We created platform-specific prototypes of the tools and conducted interviews with Fidelity Charitable and Pinkaloo account holders to get their general feedback on the tools and their preferences related to specific features, before the tools were fully developed for pilot tests.
2. We worked with the platforms to design and launch pilot versions of these tools through their websites and email channels. There were four of these pilots: two with Fidelity Charitable (one for each tool), one with Charity Navigator (for the subscription model)

and one with Pinkaloo (for the personal giving review). We collected qualitative and quantitative data to understand the results of these pilots and make recommendations for future implementation.

Charity Navigator

➤ *Pilot structure*

The participants that entered their email addresses to see their results were divided into the following three groups:

- ***Group 1 (no subscription emails):*** Donors were shown a list of five recommended non-profits on their results page, and received only one follow up email with this same list of organizations immediately after finishing the quiz.
- ***Group 2 (weekly "all non-profits" recommendation emails):*** Donors were shown a list of five recommended non-profits and received weekly emails with these same five organizations for four weeks immediately upon inputting email.
- ***Group 3: (weekly "one non-profit" recommendation emails) group:*** Donors were shown an initial non-profit recommendation at the end of the quiz and then received weekly emails with one unique non-profit recommendation per email for four weeks.[31]

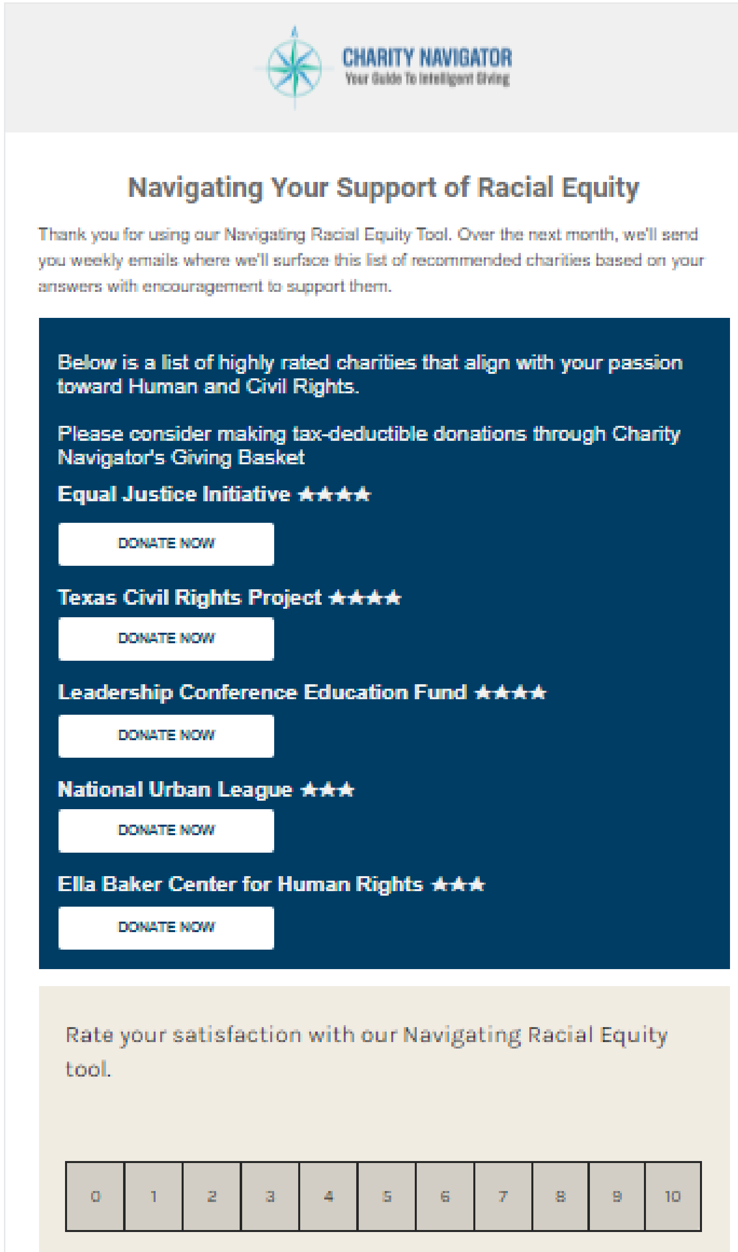
➤ *How we marketed the quiz*

The quiz was initially marketed through an email campaign to people who had previously used the Charity Navigator Giving Basket to donate to non-profits working on racial justice issues. We also deployed pop-up modals to racial justice-related Hot Topics pages on the Charity Navigator website[32].

Marketing was expanded in May 2021 to include a pop-up modal on the Charity Navigator homepage, a social media campaign, and inclusion of the quiz in Charity Navigator's May 2021 newsletter, which included all donors in the Charity Navigator email listserv.

Regardless of how a pilot participant clicked through (from an email, social media, or pop-up modal), they were assigned to one of three different conditions, which determined the frequency by which they would receive their recommended organizations. Otherwise, the user experience was the same from the time a pilot participant clicked through to the quiz until the final results page.

All pilot participants were given the option to either 1) take a quiz that would return recommendations for non-profits in one of five cause areas, or 2) directly select one of the five cause area categories of non-profits they would like to explore (i.e. not take the quiz and receive the same recommendations). For both groups, in order to receive the recommended organizations, pilot participants had to share their email address. Pilot participants that did not enter their email addresses did not see their quiz results and were not included in our analysis.



CHARITY NAVIGATOR
Your Guide To Intelligent Giving

Navigating Your Support of Racial Equity

Thank you for using our Navigating Racial Equity Tool. Over the next month, we'll send you weekly emails where we'll surface this list of recommended charities based on your answers with encouragement to support them.

Below is a list of highly rated charities that align with your passion toward Human and Civil Rights.

Please consider making tax-deductible donations through Charity Navigator's Giving Basket

Equal Justice Initiative ★★★★

DONATE NOW

Texas Civil Rights Project ★★★★

DONATE NOW

Leadership Conference Education Fund ★★★★

DONATE NOW

National Urban League ★★★

DONATE NOW

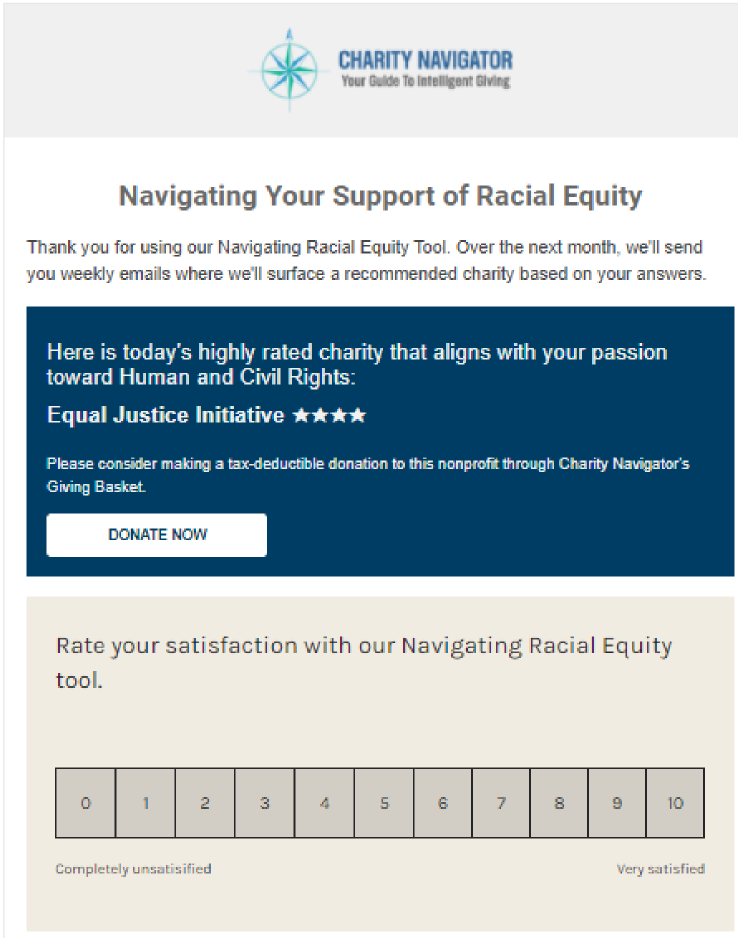
Ella Baker Center for Human Rights ★★★

DONATE NOW

Rate your satisfaction with our Navigating Racial Equity tool.

0	1	2	3	4	5	6	7	8	9	10

Email that group 2 received each week. It included all five nonprofit recommendations, the ability to click to donate through the Charity Navigator Giving Basket, and the opportunity for the donor to rate their satisfaction with the tool.



Email that group 3 received. It included a different nonprofit recommendation each week, the ability to click to donate through the Charity Navigator Giving Basket, and the opportunity for the donor to rate their satisfaction with the tool.

On the results page and in the follow up emails, links were provided to a pre-populated Charity Navigator Giving Basket page so that a participant could easily donate to the recommended organization(s).

➤ *Outcomes of interest and how we measured our results*

We were interested in learning about whether and how participation in the quiz influenced donation activity, whether participation had an effect on donor satisfaction, and whether the tool provided opportunities for donors to discover new non-profits. To measure these outcomes, we collected data about donations made through the Charity Navigator Giving Basket during the test period, and engagement with the emails quiz participants received. We also emailed a survey to donors who signed up to receive recommendations in order to solicit more qualitative feedback.

Fidelity Charitable Charity Matchmaker Quiz

➤ *Pilot structure*

The quiz was publicly available on the Fidelity Charitable website, and there was only one version of the quiz presented, so there was not an A/B test in place. Instead, we were interested in gathering engagement data on the quiz and feedback from donors who took the quiz through the optional survey presented on the final page.

➤ *How we marketed the quiz*

A marketing email was sent to all Fidelity Charitable donors that did not participate in the other email pilot we did with them as part of this project (described in the personal giving review section of this appendix below).

➤ *Outcomes of interest and how we measured our results*

We tracked engagement with the quiz[33] and gathered survey results.

Fidelity Charitable Personal Giving Review Email Pilot

➤ *Pilot structure*

Our target audience was Fidelity Charitable donors that made grants to environmental non-profits in 2020. These accounts were divided into two groups, with each receiving an email in May 2021.

The Environmental Steward group email included:

- Identity framing by calling the donor an “Environmental Steward”
- Introductory text acknowledging the donor’s grants to environmental non-profits over the past year
- A social benchmark showing the percentage of the recipient’s grants to environmental organizations over the past year compared to the average percentage of grants to environmental organizations for all other Fidelity Charitable clients.
- A section that lists two environmental non-profits the recipient granted to in the past year, and a call to action to grant to these organizations again
- Resources for continued environmental giving:
  - A link to the Candid GiveList for environmental causes
  - A link to the Giving Compass resource page for environmental giving

Image of the email the Environmental Steward group participants received.
The social benchmarking and donation history data were customized for each donor.

The Generous Giver group email included:

- Introductory text acknowledging the donor's grants to environmental non-profits over the past year
- Resources for continued environmental giving:
    - A link to the Candid GiveList for environmental causes
    - A link to the Giving Compass resource page for environmental giving

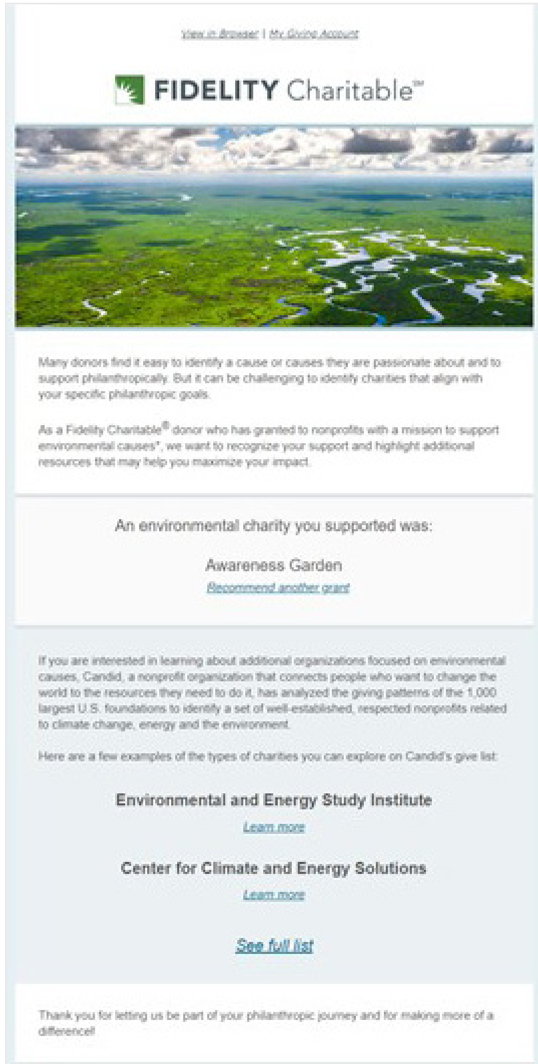


Image of the email the Generous Giver participants received. It did not include the social benchmarking data or the identity framing calling the donor an "environmental steward."

➤ *How we marketed the pilot*

Eligible donors received the email in May 2021. Fidelity Charitable re-sent the email to all donors who did not open the email within one week of the initial send.

➤ *Outcomes of interest and how we measured our results*

We looked at email engagement data and grant and contribution data for 30 days after the emails were sent. We conducted interviews with three Fidelity Charitable donors who received the emails to get their feedback.[34]

Pinkaloo Personal Giving Review Dashboard

- ***Pilot structure***

  We did not run an A/B test with Pinkaloo. Instead, we used screen recordings and site heatmaps to understand engagement with the personal giving review features.

- ***How we marketed the pilot***

  The pilot was not marketed. Instead, account holders were able to discover the personal giving review features on their own by logging into their Pinkaloo dashboard.

- ***Outcomes of interest and how we measured our results***

  To understand how account holders interact with the giving account dashboard, we reviewed screen recordings and site heatmaps. We also interviewed four Pinkaloo account holders to get their feedback on prototypes of the design.[35]

Endnotes

[1] ideas42. Nicer than your neighbor? Results from a poll on giving and generosity. Retrieved November 19, 2021, from http://www.ideas42.org/wp-content/uploads/2016/11/Giving-Poll_2016-.pdf.

[2] Money for Good 2010: The US Market for Impact Investments and Charitable Gifts from Individual Donors and Investors. 2010. Camber Collective. https://static1.squarespace. com/static/55723b6be4b05ed81f077108/t/566efb6cc647ad2b441e2c55/1450113900596/Money+for+Good+I.pdf (November 19, 2021).

[3] Limited attention. ideas42. (2015, June 9). Retrieved November 22, 2021, from https://www.ideas42.org/principle/limited-attention/.

[4] Scheibehenne, Benjamin, Rainer Greifeneder, and Peter M. Todd. "Can There Ever Be Too Many Options? A Meta-Analytic Review of Choice Overload." Journal of Consumer Research 37, no. 3 (October 2010): 409–25. https://doi.org/10.1086/651235.

[5] Andreoni, J. (1989). Giving with Impure Altruism: Applications to Charity and Ricardian Equivalence. Journal of Political Economy, 97(6), 1447–1458. https://doi.org/10.1086/261662

[6] The available cause areas were: Arts, Culture, and Humanities; Education; Human and Civil Rights; Human Services and Health; Research and Public Policy, and a "grab bag" category that included non-profits from the five different cause areas

[7] n=159 of 215 participants

[8] n=84 of 215 participants

[9] n=32 of 64 participants

[10] n=14 of 15 participants

[11] n=14 of 23 participants

[12] n=14 of 23 participants

[13] Participants who took the quiz and donated had an average rating of 3.9 (on a five-point scale) for the alignment of their donations with their values and interests, compared with an average rating of 2.4 for participants who only selected a cause ($p<0.05$).

[14] $p=0.00$

[15] n=207 of 215 participants

[16] n=146 of 215 participants

[17] Six of the survey's twelve respondents asked for a geography question to be added.

[18] We ran a mixed effects logistic regression comparing individuals' likelihood to donate in the period 3 months prior to receiving the tool with their likelihood to donate within five days after receiving the tool ($n = 144,587$; $p < 0.01$)

[19] Within five days

[20] We ran a mixed effects Poisson regression comparing the number of donations made per day in the period 3 months prior to receiving the tool with the number of daily donations made within five days after receiving the tool ($n = 144,587$; $p < 0.01$)

[21] We ran a mixed effects linear regression comparing the total amount donated per day in the period 3 months prior to receiving the tool with the total amount donated per day within five days after receiving the tool ($n = 144,587$; $p < 0.01$)

[22] Over a period of five weeks after the participant inputted their email address.

[23] We ran a linear regression comparing the average size of donations made by individuals who received one non-profit recommendation per email during the testing period with the average donation size of donations made by individuals who received five non-profit recommendations per email ($n = 801$; $p < 0.05$)

[24] These emails were also sent over a period of five weeks after the participant inputted their email address, and we measured donation activity for those five weeks.

[25] 9.5% of quiz completions (n=46 of 485 quiz completions)

[26] n=139 of 208 participants

[27] This finding was statistically significant at the 0.001 level

[28] This finding was statistically significant at the 0.05 level

[29] In this context, a donation is a grant made from a Fidelity Charitable account holder's DAF to an environmental non-profit. For this analysis, we excluded any recurring grants to environmental organizations because we did not have data about when these recurring donations were set up (i.e. whether it was before or during the test period).

[30] 5.25% of the treatment group made a grant to an environmental organization during the test period, and 4.6% of the control group made a contribution ($p=0.044$, $n=17,899$)

[31] Treatment group 1 n=424, treatment group 2 n=398, treatment group 3 n=403.

[32] Pop-up modals appeared on the following Hot Topics pages: Black & African American-Focused Charities, Nonprofits Serving Asian Communities, Indigenous Peoples & Native-Led Nonprofits, Black-Founded Nonprofits, Civil Rights, and Black History Month

[33] The quiz was completed a total of 485 times from July-October 2021.

[34] These interviewees were recruited after they responded to an email from Fidelity Charitable asking them whether they would like to provide feedback on recent communications from the organization.

[35] These interviewees were platform power users, recruited by Pinkaloo's CEO.

[36] Scheibehenne, Benjamin, Rainer Greifeneder, and Peter M. Todd. “Can There Ever Be Too Many Options? A Meta-Analytic Review of Choice Overload.” Journal of Consumer Research 37, no. 3 (October 2010): 409–25. https://doi.org/10.1086/651235.

[37] Limited attention. ideas42. (2015, June 9). Retrieved November 22, 2021, from https://www.ideas42.org/principle/limited-attention/.

[38] Andreoni, J. (1989). Giving with Impure Altruism: Applications to Charity and Ricardian Equivalence. Journal of Political Economy, 97(6), 1447–1458. https://doi.org/10.1086/261662