



# Made to Measure Platform Pilot

Project Report & Research Insights

Michael Herman • Nick O'Donnell •  
Julia Ritz Toffoli • Sarah Welch

**April 2024**

# Acknowledgments

We are thankful for the support and collaboration of our platform and donor community partners, and their teams, without whom this project would not have been possible: CapShift, Collaboratory, Florida Philanthropy Network, Forward Global, Hispanics in Philanthropy, National Center for Family Philanthropy, Philanthropy Network Greater Philadelphia, and The Mesa (I.G. Advisors). We would like to thank the donors from all the donor communities for providing input and feedback throughout this project. We also owe many thanks to our teammates at ideas42 who contributed to this project along the way. This report was completed with the support and efforts of Piyush Tantia, Cameron French, and Jeremy Barofsky. This report was made possible through the generous support of the Bill & Melinda Gates Foundation. We are particularly grateful for the guidance, encouragement, and partnership of Sophie Snowden and other members of the Philanthropic Partnerships Team throughout this project.

## About ideas42



ideas42 is a nonprofit that applies insights from behavioral science—the study of how people make decisions and act in the real world—to improve lives and drive social change. Working globally, we reinvent the practices of institutions, and create more effective products and policies that can be scaled for maximum impact.

We also teach others, ultimately striving for 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 the past 15 years, we've been at the forefront of applying behavioral science to create a more equitable world. And as we've developed our expertise, we've helped to define an entire field. Our efforts have so far extended to 50+ countries as we've partnered with hundreds of governments, foundations, NGOs, private sector entities, and philanthropic leaders.

Visit [ideas42.org](https://ideas42.org) and follow [@ideas42](https://twitter.com/ideas42) on X to learn more about our work. Contact [info@ideas42.org](mailto:info@ideas42.org) with questions.

# Contents

---

- Introduction ..... 4**
  - The Context..... 4
  - The Challenge..... 5
  - The Platform Pilot..... 5
  
- A Note on Donor Segmentation ..... 8**
  
- Insights About Donor Behavior on the Platforms ..... 10**
  - Platform marketing and donor activation efforts failed to attract significant numbers of donors.....10
  - Donor onboarding and usage metrics were low overall..... 11
  - Engagement Patterns: Donors wanted to be content consumers, not creators .....14
  - Takeaways: Possible factors driving low engagement .....18
  
- Insights About Pilot Design ..... 22**
  - HNW donor communities are unique ecosystems that are difficult to test in ..... 22
  - Donor reluctance to disclose giving data made evaluation challenging ..... 22
  - Equity considerations & challenges ..... 23
  
- Recommendations ..... 24**
  - Design Recommendations for Digital Platforms ..... 24
  - Implementation Recommendations ..... 26
  
- In Closing..... 28**
  
- Appendices**
  - Appendix A: The Timeline ..... 29
  - Appendix B: Partner Summary..... 30
  - Appendix C: Platform Designs and Features.....31
  - Appendix D: Summary of Project Activities..... 35
  - Appendix E: Activation & Engagement Strategies Worksheet ..... 37
  - Appendix F: ideas42 Communications Audit Checklist..... 44

# Introduction

---

## The Context

Nonprofit organizations help tackle the hardest problems facing society, improving the lives of hundreds of millions of people around the world. Yet for many of these organizations, their ability to make this social change depends on an ever-changing resource: philanthropic giving.

In 2022, donors in the United States gave **\$499.33 billion**. The majority of this giving, 64%, came from individual givers—more than all other sources combined. Among individual donors, high net worth (HNW) donors—those with **assets of one million dollars or more**—stand out as particularly generous: 91% of HNW households donated to charity in 2015 vs. 58% of the general population. The average dollar amount given to charity by HNW donors was **\$25,509 vs. \$2,520** by the general population.

But while most giving comes from individual donors, those gifts don't always go where they could have the most impact. ***Serious problems exist that philanthropic resources could solve, but not enough resources go where they are most needed.*** Most philanthropic dollars—especially those from HNW donors—are going to already well-funded institutions like universities and religious organizations, while significantly less funding is going toward grassroots, community-based organizations and leaders.

This doesn't necessarily mean that donors fundamentally *prefer* donating to big, well-funded institutions; it also reflects features of the giving system that make it hard for donors to discover, choose, and engage with organizations, or get feedback on their giving.

To address these behavioral challenges faced by donors and nonprofits alike, since 2015 ideas42 has been working in the philanthropic sector, with generous support from the Bill & Melinda Gates Foundation and other funders, to advance four overarching goals:

- 1. Intentional, generous donors:** To help more people give, and give effectively, so their generosity translates to the social impact they envision.
- 2. Well-resourced, impactful nonprofits:** To make it easier for nonprofit leaders, regardless of their background, to get funding so they can spend their time on what they're best at: pursuing social good.
- 3. Strong philanthropic infrastructure:** To strengthen and build critical infrastructure across the giving ecosystem
- 4. Equity in giving:** To facilitate giving to address systemic inequities.

ideas42 works with partners across the philanthropic sector to identify barriers and opportunities to design, test, and scale behavioral strategies that advance our goals.

## The Challenge

The COVID-19 pandemic in 2020 presented an opportunity to explore and improve how HNW donors discover and evaluate giving opportunities. As the pandemic unfolded and racial justice protests swelled, donors were eager to support increasingly urgent needs in their communities, but too often felt paralyzed about where to give. For donors more familiar with the giving landscape, an inverse problem arose: they had countless recommendations for worthy organizations that other donors could give to, but no centralized way to share them. As needs increased, the Gates Foundation found itself fielding both requests and offers, which raised the questions:

**What happens when you connect donors to each other? If trusted peers share opportunities with each other, will they be more likely to give to those opportunities?**

Building on the [COVID-19 Philanthropy Commons](#)—an initiative led by the Milken Institute to explore the value of mutually informed action for institutional donors—in 2021, the Gates Foundation’s Philanthropic Partnerships Team launched Made to Measure, a similar initiative that sought to explore and test the same question with a different audience: Could a peer exchange platform for *individual* HNW donors help improve donors’ philanthropic practice and **drive more dollars toward where they were most needed?**

## The Platform Pilot

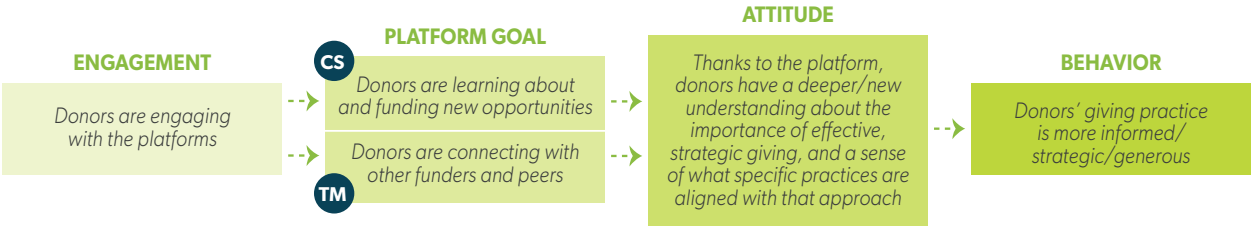
The Made to Measure (MTM) pilot was conceived in 2020 to help meet the demands of the COVID-19 response and racial justice efforts, with a broad goal: to increase funding to areas of greatest need. Shortly after, the Philanthropic Partnerships Team shifted their strategy to include a focus on promoting giving that advances equity. This shift also influenced the goals of the MTM pilot, which had already begun recruiting donor networks as potential partners. By the time the pilot was launched in 2021 the original single goal had evolved to reflect this increased focus on equity. Ultimately, the pilot had three overarching goals:

- 1. To test, research, and better understand the barriers**, in different types of high-capacity donor communities, to charitable giving targeted to addressing global inequities;
- 2. To rapidly prototype and tailor** a donor platform to improve charitable giving and to increase charitable impact; and
- 3. To share lessons learned** with the broader philanthropic sector.

The name “Made to Measure” refers to the world of garment tailoring, where made-to-measure garments start from a standard pattern but are then tailored to fit an individual—they are more customized than off-the-rack, but not as one-of-a-kind (or expensive) as bespoke. The Philanthropic Partnerships Team had a hypothesis that an off-the-shelf platform solution—often focused on user volume and targeting everyday donors—wouldn’t be a good fit for HNW donors with specific needs, but that a fully bespoke solution—designed from scratch, usually for UHNW donors—wouldn’t be scalable for the size of the HNW donor segment. To accommodate this unique middle ground, the platform partners selected for the pilot had existing products that they would be able to tailor for the HNW donor community contexts.

The pilot aimed to do this by building shared platforms that responded to specific needs expressed by donors: a desire to connect with peers, and a preference for funding peer-recommended giving opportunities. The two platforms partners, **CapShift** and **The Mesa**, were selected for their differing theories of change:

- ▶ **CapShift** built a space for donors to recommend impactful **giving opportunities** to their peers, as well as learn about each others’ giving.
- ▶ **The Mesa** built a space for donors to **engage in a dialogue** with each other about giving, to both share expertise and seek advice, as well as other giving resources.



Five donor communities were invited by the Gates Foundation to participate in the pilot to represent a diversity of donors and donor network organizations, such as both HNW donors and smaller institutional donors and family foundations, as well as both global networks and local/regional networks:

- ▶ Florida Philanthropy Network (FPN) and their implementation partner Collaboratory
- ▶ Forward Global (FG) (formerly The Philanthropy Network)
- ▶ Hispanics in Philanthropy (HIP)
- ▶ National Center for Family Philanthropy (NCFP)
- ▶ Philanthropy Network of Greater Philadelphia (PN)

**All of the donor networks committed to testing whether digital platforms could increase the quantity, quality, and focus of high capacity giving.**

ideas42 was asked by the foundation to evaluate the pilot and share insights and learnings. We also hoped to bring a behavioral lens to the project, drawing on our deep research into the giving behavior of donors at all levels. Where possible, we sought opportunities to help design and integrate behaviorally informed features onto the platforms, though the constraints of the pilot meant these were limited. In evaluating the pilot, we recognized the improbability of observing long-term changes to giving behavior within its brief timeline. Instead, we identified proxy metrics—such as platform adoption and activity—to assess success in the interim.

Overall, the pilot aimed to:

- ▶ Drive peer connections and build community, hopefully leading to increased attention to giving and possibly scaling up giving.



- ▶ Help donors discover giving opportunities with impact stories, hopefully leading to funding lesser-known organizations advancing social change.
- ▶ Track giving behavior on donor profiles to provide feedback and inform giving strategies.
- ▶ Ultimately shift donor towards more generous, impactful, and equitable giving and practices.

Over the course of this project, **Made to Measure ultimately launched platforms for three of the five donor community partners:**

<b>FORWARD GLOBAL'S AMPLIFIER</b>	<b>NATIONAL CENTER FOR FAMILY PHILANTHROPY'S PEER EXCHANGE PLATFORM</b>	<b>PHILANTHROPY NETWORK GREATER PHILADELPHIA'S PNCONNECT</b>
FG (formerly known as The Philanthropy Workshop) officially made their version of CapShift's platform accessible to their community members in late summer of 2022, though significant efforts to market this new offering were postponed until winter 2022/2023 to align with the release of an updated FG homepage.	NCFP launched their version of The Mesa platform in spring of 2023 to their full donor membership.	PN initially launched their version of the CapShift platform to two small cohorts of early adopters in the fall of 2022, and ultimately opened up access to their full community membership in early summer of 2023.

*The other donor communities—Florida Philanthropy Network (FPN) and their implementation partner Collaboratory, and Hispanics in Philanthropy (HIP)—ultimately decided not to launch their instances of The Mesa platform to their communities.*

The three platforms launched much later than initially planned, in part due to platform customization taking longer than anticipated. This resulted in a shorter window in which to capture user engagement with the platforms. But however limited, the data collected from the platforms reveals some key findings about whether and how a HNW donor peer-exchange platform could influence giving.

In this report, we present key insights from the platform pilot—activity, adoption, design, and impact—as well as recommendations for the field based on these learnings. Taken together, these findings shed light on barriers to and solutions for more generous and equitable giving for both HNW donors and the broader giving ecosystem.

This report was drafted as an evaluation of the pilot for the Gates Foundation, as well as to share learnings and insights with the broader philanthropic field. These findings may be useful to a range of actors, including anyone working directly with HNW donors, such as donor communities or philanthropy advisors, anyone designing online platforms, donor-facing products, or other philanthropic infrastructure/technology, and other innovators in the social sector. In addition to this report, individual pilot participants may choose to publish their own learnings and experiences of the project which we welcome and encourage.

*This report summarizes qualitative research conducted from January 2021 to September 2023, and platform usage data from July 2022 to September 2023.*

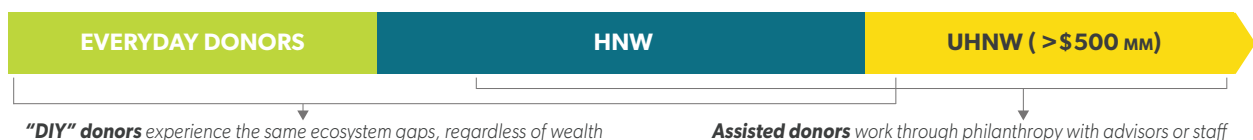
# A NOTE ON DONOR SEGMENTATION

## How donors manage their giving often matters more than *how much* wealth they have

The MTM pilot targeted high net worth donors with the goal of testing whether they would be motivated to engage with a self-serve peer-exchange platform to seek and share recommendations and personal information. Through this pilot and our other research, we later realized that we need to distinguish between donors who handle their giving on their own (“DIY”) vs. those who are assisted by philanthropy professionals. While the MTM platforms could theoretically be adapted for philanthropy professionals to research and share giving opportunities, they were built for donors. However, the donor communities we partnered with have as members both types of donors as well as staff and advisors in some cases. The results of the pilot need to be viewed with these different segments of users in mind.

Historically, ideas42’s research on donor behavior has focused on donors across the spectrum of wealth, from “everyday” donors (low and middle income, which we define as less than \$1 million in net worth) all the way to high net worth donors (HNW, who range from \$1 million to \$100 million net worth) and ultra-high net worth donors (UHNW, more than \$100 million).<sup>1</sup> Until now, we—and the philanthropic sector more broadly—have tended to segment donors by wealth into these three buckets, assuming that differing wealth implies different needs or behaviors. However, throughout our MTM and other U/HNW research, our methodological focus on contextual features—the environment and factors that influence decision-making—has revealed a different segmentation that emphasizes donor *approach* instead of donor *wealth*. Instead of wealth levels, we propose these archetypes:

- ▶ **“DIY Donors”** are those who manage their giving themselves, whether small retail donations on giving platforms or significantly large checkbook donations. The key feature is that these donors *make and execute giving decisions on their own*. These donors experience the same ecosystem gaps, regardless of wealth, with even U/HNW donors occasionally using the same online giving platforms and direct giving approaches as everyday donors.
- ▶ **“Assisted Donors”** are those who *rely on the support of advisors or staff* to make and execute giving decisions, ranging from support researching grantees all the way to fully staffed family offices or family foundations. These donors tend to be HNW and UHNW, given the added cost of paying for advising or staff.



<sup>1</sup> Ranges indicate total assets, not income.



In other words, while there is still a correlation between how much wealth a donor has and how likely they are to pay for assistance with their philanthropy, some very wealthy donors may nonetheless interact with the giving space in the same way as much more modest donors: navigating it on their own. Other wealthy donors might only interact with the giving space indirectly through their staff, never experiencing donor-facing products themselves.

# INSIGHTS ABOUT DONOR BEHAVIOR ON THE PLATFORMS

---

**A** pilot such as this, tested on a relatively elite set of users, is difficult to evaluate, in part because there is no benchmark against which to measure metrics such as onboarding rates, given the absence of an equivalent product in the field. That said, ***donor uptake of the two platforms was lower than expected relative to the interest initially expressed by the communities and by the donors themselves.***

## Platform marketing and donor activation efforts failed to attract significant numbers of donors

From the beginning, we knew that donor activation and engagement efforts would be critical to the success of the pilot. User adoption is a particularly behavioral challenge, as it entails capturing and maintaining attention, generating motivation, reducing hassles, and fostering positive reinforcement. To mitigate potential barriers, we developed a slate of activation and engagement strategies for the HNW donor community context.<sup>ii</sup> These included activities and tactics designed to address specific behavioral barriers, like organizing group onboarding events to assist donors in filling out their profiles together (to mitigate procrastination), framing the platform as an exclusive membership perk (to mitigate status quo bias), or leveraging social proof by sharing how many of their peers had already joined (to mitigate negative assumptions). We worked with all five communities and the platforms to tailor the plans for their specific donor audiences, align their communications and marketing plans with behavioral best practices, and develop an implementation timeline. Activation and engagement was also a priority topic during the first two quarterly convenings we hosted for the cohort in 2022, where the partners shared share crosscutting learnings and best practices with each other.

Despite best intentions and extensive planning, efforts to attract users and onboard donors onto the platform fell short. Marketing a new product to donors required a greater logistical lift on the part of the communities than had been anticipated—developing marketing and communications content, training other community staff, hosting events—which was difficult with limited time, staff, and resources.

Adequate marketing and communication about a new product and its value proposition for users is critical for raising awareness and generating demand. The “Rule of 7” in marketing posits that it takes, on average, seven impressions before a user is prompted to take action. On the other hand, donor attention is limited, and the communities must be strategic in their communications and avoid spamming their members with too many messages. Efforts to market the platform competed with other, often higher-priority core offerings, such as conferences, programming, and grant-matching campaigns. It was hard to put platform-related messaging in front of donors 7+ times when those other priorities—often generating critical revenue for the communities—might have been crowded out.

---

<sup>ii</sup> See Appendix E for [Activation & Engagement Strategies Worksheet](#)

This was compounded by some uncertainty on the part of the communities about promoting an early-stage product that, while continuously improving, still felt relatively unfinished. In some cases, reservations about the whether the platforms were ready for donors led to repeatedly delayed launch timelines to allow more features to go “live” before onboarding donors. And these fears were not unfounded; we did hear feedback from some early users that the sparseness of content on the platforms discouraged them from returning. However, these users were in the minority; many users who did onboard initially returned to the platform. That said, many donors never onboarded at all.

Ultimately, it’s likely that most donor community members simply weren’t marketed to as extensively or effectively as needed for them to become aware of the platform and curious enough to explore it.

### Donor onboarding and usage metrics were low overall

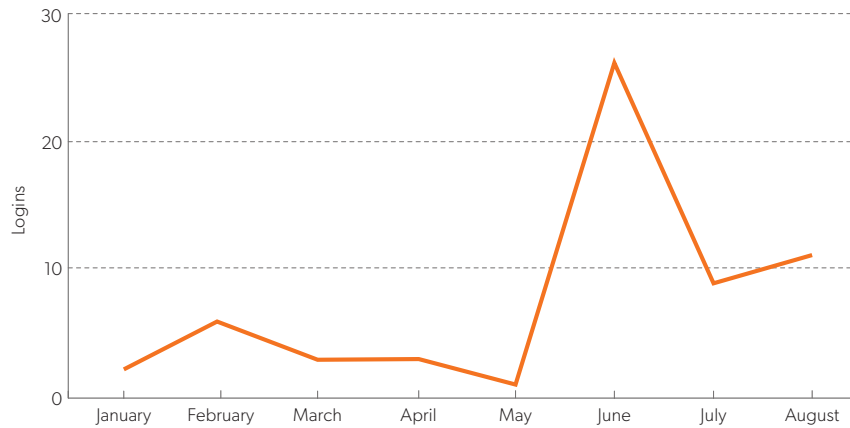
Below are graphs of usage over time for each of the three community platforms that launched. For CapShift platforms, the graphs track the number of users who logged in at least once in each calendar month. In The Mesa’s case, because users automatically remain signed in after their initial login, precise login numbers were not possible to collect. Instead, for the Peer Exchange Platform (launched on The Mesa), we tracked on a monthly basis the number of “active users,” defined by The Mesa as meeting a minimum level of engagement (which included some combination of logging in, creating posts, commenting on posts, liking posts, or RSVPing to events).

FORWARD GLOBAL'S **AMPLIFIER**, LAUNCHED ON CAPSHIFT



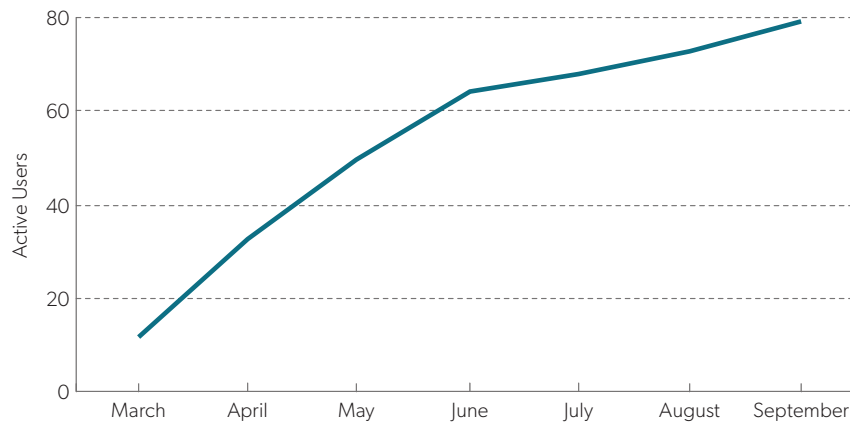
Number of user logins between January and August 2023

## PHILANTHROPY NETWORK'S **PN CONNECT**, LAUNCHED ON CAPSHIFT



*Number of user logins between January and August 2023*

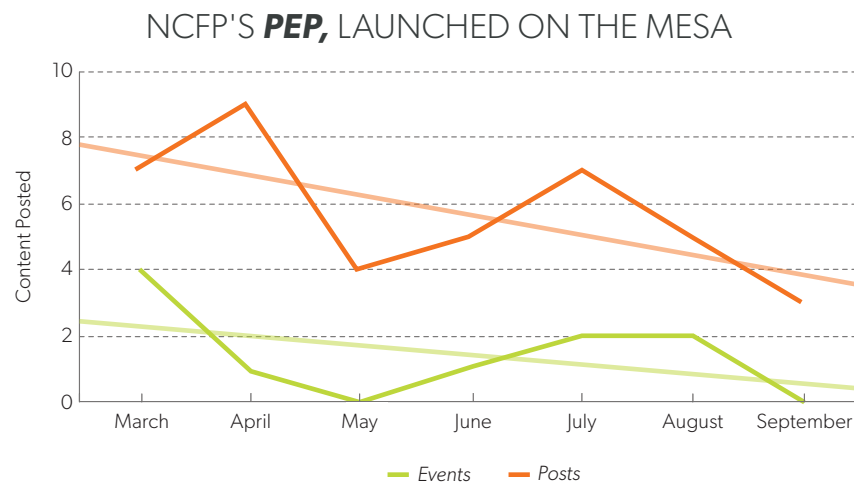
## NCFP'S **PEP**, LAUNCHED ON THE MESA



*Number of active users between March and September 2023*

In the time the platforms were live, usage of the platforms was sporadic. On the CapShift platforms, usage did not trend consistently upward over time: Amplifier logins peaked in early spring before slowly dropping over the course of the summer; PNConnect logins spiked after the platform was launched to all members (following a soft launch with a smaller group in the months prior), before flattening out. Even with moderate expectations about frequency of use, **this data suggests that Amplifier and PNConnect were not on a trajectory to widespread and sustained user adoption.**

While a glance at the “active users” figure may suggest that NCFP’s platform was on a more successful trajectory, a deeper dive into platform usage presents mixed results. While the number of active users, as defined by The Mesa, grew, actual engagement within the platform shrank, with the number of posts and events shared to PEP trending downward over time. Engagement with those posts and events—in the form of likes and RSVPs, respectively—stayed relatively stagnant.



*Content posted by users between March and September 2023*

User activity hinted at some emerging adoption trends across the different donor communities. In this case, by “adoption” or “uptake” we mean not just initial logins, but repeat visits and recurring engagement on the platform. Across both CapShift and The Mesa (regardless of the platform’s theory of change), platform adoption appeared to be more successful in communities with a diverse and spread-out membership with more individual donors than staffed funders.

We saw somewhat higher uptake in communities with a global membership of geographically dispersed individual donor members that engaged in a mix of local, regional, national, and international giving. These community members tended to be more DIY individuals or families with higher agency over their giving strategy. This included NCFP on The Mesa and FG on CapShift.

In the communities with a regional focus and geographically confined members—where members engaged mostly in local and regional giving—uptake was either low or the platform failed to launch entirely. Communities with lower uptake also had a higher percentage of institutional donors (small foundations and family offices) with staff. In this case, users were administrators, not trustees, who likely did not necessarily have agency over giving strategy. This included FPN/Collaboratory and HIP, both of whom declined to launch The Mesa to their members, as well as PN who did launch CapShift to low uptake.

Efforts to onboard users onto the platform revealed a misalignment between the initial interest we heard from donors and the communities about what donors wanted from a platform, and their ultimate uptake of platforms that met those needs.

**Donors liked the idea of a trusted peer exchange platform, but the reality of it was less appealing.** Several donors we spoke to noted that they had ambitions to do more than they were currently doing in their philanthropy, but that limited time was a constraint. Asking for engagement with a new and unfamiliar technology likely felt like a significant **hassle** that they didn’t have

#### **HASSLE FACTORS**

Inconveniences or obstacles that impede the desired behavior. The effort it takes us to complete an action can prevent us from following through on our intentions, whether small (finding or buying a stamp to mail a letter) or large (completing a 10-page application form).

the bandwidth for in the moment—even if the value proposition was clear and they intended to use it at some point. One donor shared, “I logged in a few times, but then I got busy.” If the value of the platform was not clear—as may have been perceived by some donors—uptake was even less likely. A similar **intention–action gap** also appeared in our evaluation process: about half of the donors who showed initial interest in testing the platform, and agreed to follow-up interviews during our prelaunch interviews, ultimately chose not to participate in those additional conversations when asked later on.

#### **INTENTION-ACTION GAP**

When one's actions do not match their values, attitudes, or intentions. Some factors that explain this behavioral bias include one's motivation and relative preferences. Sometimes, the gap results from behavioral bias favoring immediate gratification.

## **Engagement Patterns: Donors wanted to be content consumers, not creators**

Donors were somewhat interested in viewing content posted by others, but were less interested in posting content themselves. Not only was usage lower than hoped, but those donors that did onboard were content consumers, not content creators. This problem is common in most social networks, where up to 90% of users never contribute content. We were aware of the challenges in other contexts, but from initial donor and community conversations we were optimistic that donor savviness, community cohesion, and the opportunity for behavioral interventions would result in higher adoption of a social networking platform.

For donors who did onboard to the platform, few posted content. Content generation across the three platforms that launched was slow: for instance, between January and August of 2023, FG's Amplifier users added an average of 6.5 new donation opportunities per month—total, across all users. As for NCFP's PEP, they saw an average of just under six new posts per month between March and September of 2023.

The lone exception to this trend was PNConnect, which saw a spike of submitted opportunities between early and mid 2023.<sup>iii</sup> While this might seem like evidence of organic user engagement, it's worth noting that PN required users to submit a minimum of five<sup>iv</sup> opportunities in order to access the platform. As a result, PNConnect saw a steep climb in opportunity uploads in August, reflecting the fact that onboarding opened up to the full PN membership in early summer. Once that gating requirement was removed in the fall, content generation returned to a low baseline.<sup>v</sup>

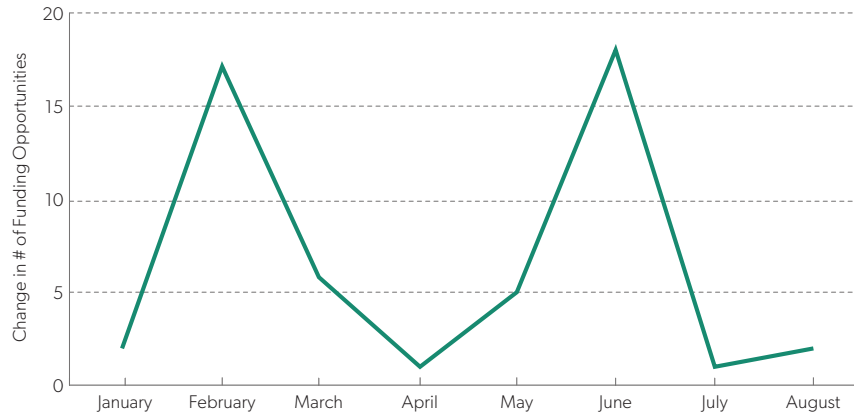
<sup>iii</sup> In 2023: Two dozen in January; 12 in July; 155 in August.

<sup>iv</sup> And up to their full grant making portfolio, at least initially (before more specific criteria was set).

<sup>v</sup> In 2023: 155 opportunities added in August, only 6 added in the first half of September.

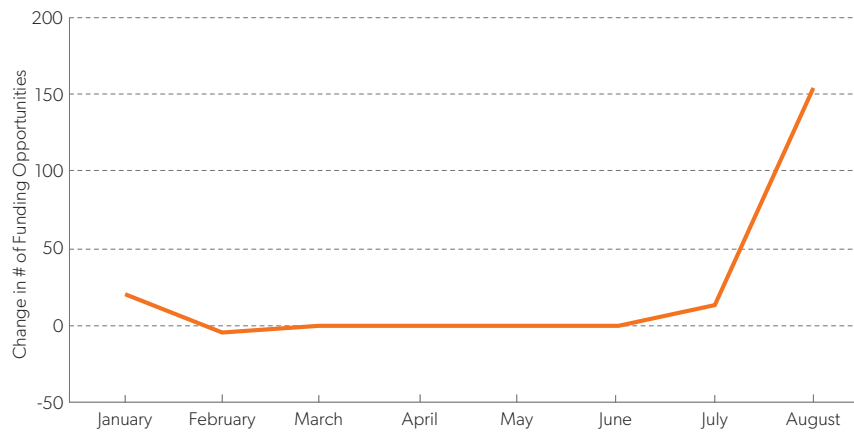


### FUNDING OPPORTUNITIES ON FG'S **AMPLIFIER**



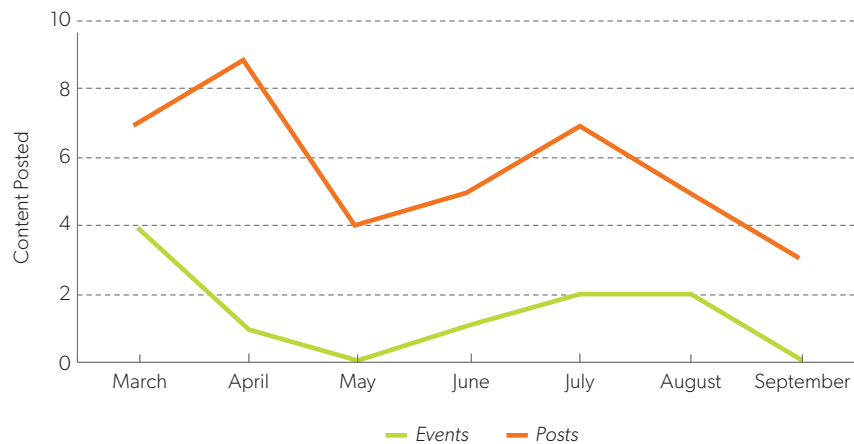
*New funding opportunities added by users between January and August 2023*

### FUNDING OPPORTUNITIES ON PN'S **PNCONNECT**



*New funding opportunities added by users between January and August 2023*

### CONTENT ON NCFP'S **PEP**



*Content posted by users between March and September 2023*

As content generation remained low, we conducted interviews with donors across each of the three platforms to understand platform uptake. Users indicated that they were interested in exploring content already on the sites but were not interested in producing their own: when asked what they hoped to use their platform in the future, each of the eleven users with whom we spoke mentioned exploring what others were posting, while only four mentioned sharing their own posts. In an effort to have some content available to view in the absence of organic donor engagement, **NCFP staff generated some content on PEP, but this was not what users wanted.**

One PEP user said, “Everything in there was from staff. Well, I have access to staff posts. That’s an entirely different channel. I opened it up, and it’s like, Oh, there’s all these posts from staff. I have other sources for staff knowledge and blogs and reports and stuff ... That’s an entirely different experience. It was a turnoff for me.”

Together, a desire to *explore* content from their peers rather than *produce* it meant that despite donor network staff’s best efforts, users were often faced with platforms they perceived to be empty and unmotivating.

### Donors were curious about who their peers were, and how (much) they were giving

In interviews with ideas42, donors expressed that their primary interest in browsing the platforms was to learn about their peers—more so out of social curiosity rather than a desire to integrate peer recommendations or ideas into their own funding practices.

Some donors cited using the platforms to survey their peers’ interests and activities before attending an in-person event. One donor mentioned that if they were to use Amplifier, **the priority would be finding donors with similar interests and funding practices:**

“ If I’m going to go to a TPW in-person gathering, I might skim Amplifier and get a sense of who has what interest.”

Others expressed an interest in using the platforms to connect with like-minded peers, or others in their donor community who shared interests in funding areas or best practices.

Donors expressed curiosity not just about who their peers were (i.e., data available on profiles) but how and how much they were giving (i.e., grant activity), in spite of being reluctant to volunteer that information themselves.

### Donors did not appear interested in using the platforms to inform their giving strategies

Across the board, we saw that many donors were significantly less flexible in their giving strategies than we expected, and as such were uninterested in browsing for new opportunities. One FG member remarked that **they wouldn’t find much use for Amplifier for selecting grantees**, as they have a relatively narrow strategy, and **wouldn’t expect to find funding opportunities** matching those criteria on the platform. The donor quoted above, who expressed interest in using Amplifier to find other donors before events, remained uninterested in using it for identifying grantees, even if the database of opportunities were more extensive and included organizations that matched the donor’s funding interests.

Even donors with more flexible strategies noted that the platforms would be unlikely to change their giving in the short term. **Several donors made sure to point out that they aren't continually changing who they give to, but rather typically have a set strategy and giving portfolio.** Interviewees noted that they infrequently search for new opportunities to give to (as we hoped they would do on CapShift), and even more rarely make broader changes to their strategies and practices (changes like those that we would hope connections on The Mesa would inspire).

It's possible that over time, the peer information, opportunities, and surveys about where funds are going might change how donors using the platforms decide to give. However, we didn't find clear evidence that seeing either funding opportunities or information about giving practices on the platforms directly led donors to act, based on their responses and actions.

### Donors lacked clear criteria and guidance around what made something worth sharing or appropriate to include

Some donors did intend to engage in order to learn, discover, and inform their giving strategies. However, uncertainty about what to share and hesitancy to endorse giving opportunities personally limited their engagement.

Especially on the CapShift platform, where donors were expected to recommend grantees to each other, donors remarked that they were unsure about what made a donation opportunity worth sharing on the platform.

One FG member told us:

“**The barrier of putting in our information feels high ... Do I just want to pick my top two organizations, or do I want to put in the top ten? I have a lot of decision fatigue.**”

Another donor said that they felt like global philanthropy is moving toward big organizations and systems change, and while FG seemed aligned with that, the donor preferred to **support more direct service grassroots organizations, and was unsure if the systems change piece was a sort of “hidden criterion.”** They felt like there

were unwritten rules for what to post, and that they didn't know what those rules or guidelines were.

This hesitation continued even when interviewees were provided additional guidance about what types of organizations could be worth sharing—for instance, suggesting that users champion their grantees that they personally saw as the most impactful, positioned for growth, or rooted in their community.

PN explored an alternative to uploading select opportunities—thus eliminating the need for criteria—in PNConnect: they initially asked donors to upload their full giving portfolio. This was feasible for early adopters and circumvented the uncertainty donors felt about choosing and sharing grantees. But the process was onerous and manual, and thus was not scalable beyond a small test group. It also negated a key feature of the platform, which was for users to share curated, *recommended* opportunities—for which clear criteria would still be required.

It's possible that part of the difficulty in setting criteria was due to the difficulty of defining and operationalizing impact and equity, which could have informed what kinds of organizations to feature.

We discuss further equity considerations below.

## Donors were reluctant to endorse anything personally in an enduring online space

Even those donors who received guidance and criteria around what to post were often unwilling to “risk” putting something in writing online—even in a semi-private space for members of a closed community. In our research, we found significant hesitancy among donors toward posting content online, a reluctance far more pronounced than when sharing information in person with peers. This reluctance was not always explicitly stated, but was a recurring theme across various discussions, indicating a widespread concern about the public visibility of personal posts in an enduring online setting.

Donors were particularly apprehensive about sharing content that could expose their vulnerabilities or, in a worse scenario, their ignorance. **Donors expressed a fear of being judged or misunderstood by their peers, especially regarding:**

- ▶ Their choice of grantees, which might reflect on their strategic judgment.
- ▶ The size of their grants, which might be perceived as too small or too large.
- ▶ Their understanding of issues, geography, philanthropic practices, or current events.
- ▶ Their endorsements and recommendations of organizations, resources, etc.
- ▶ Sharing potentially sensitive data about their grantees and partners.

One donor shared:

“ I was hoping [the platform] would be more of a place where members could have confidential conversations about issues with organizations that they’re funding, dealing with.”

The donor acknowledged that the elite notion of having a “closed door,” donor-only space may be perceived as problematic by the public, but nonetheless expressed a desire for such a space.

In short, there was general resistance to sharing “into the void,” especially when lack of active

engagement meant there was little other content to distract from a potential faux pas, and little to no positive reinforcement for contributions of value (more on this below).

Donor interviewees also expressed some misgivings about posting detailed information about their funding and grantees, noting that selecting certain grantees (and, by necessity, excluding others) to share on the platform carried political risk.

## Takeaways: Possible factors driving low engagement

### A vicious cycle: Low user engagement meant donors who were engaged eventually lost interest because of lack of new content

Given the limited amount of new content, for reasons described above, users had little reason to engage with the platforms, even sporadically. This scenario was evident in the case of NCFP's Peer Exchange Platform (PEP). During interviews with ideas42 and PEP users, donors noted that their own posts received little engagement and the platform suffered from a lack of activity, with few new posts overall. Both noted that they felt PEP would be especially useful for helping donors get questions answered by their peers, but there existed little incentive for other donors to freely offer up advice.

“ With family philanthropy being pretty private in a lot of cases, I was curious how this was going to shake out—are people actually going to be sharing, or not—and so far, I haven’t really seen that much engagement, to be honest.”

“ There wasn’t a whole lot to do. I think I posted a couple of things and maybe I think I’ve gotten a couple of likes, but nobody’s responded with information. I was like, ‘Come on, that was an easy question!’”

This challenge is [not unique to PEP and the other MTM platforms](#).

In many online platforms, a minority of users typically generate the majority of content. The 90-9-1 rule of [participation inequality](#) in online communities states that in most online communities, 90% of users are “lurkers” who never contribute, 9% of users are actively engaged, and only 1% of users generate the majority of the content. A 2021 Pew study revealed that 25% of Twitter users produced 97% of tweets. Such an imbalance isn’t necessarily problematic for social media platforms focused on entertainment, distraction, or information, where content is content regardless of who created it. However, for platforms like Made to Measure, the expectation was for donors to form an engaged community, sharing best practices and identifying new funding organizations; the value proposition was not just in the content but in the users themselves. With most recommendations emanating from a limited group of donors (often with niche giving strategies, like hyperlocal arts and music organizations), users found it hard to discover opportunities that aligned with their interests and criteria. Similarly, on The Mesa, the dearth of postings meant users seldom found relevant answers or content. With minimal posts and little new activity over time, donors quickly lost interest in engaging with the platform.

### NETWORK EFFECT

A principle that illustrates the idea that when more people use a product or service, its value increases. The network effect significantly applies to digital platforms, dating all the way back to the internet itself.

### Separating social connection and giving opportunities likely reduced engagement

While both The Mesa and CapShift were intended to have similar effects in changing donor behavior, the two platforms were built with notably different features, and thus each had a unique use case and theory of change (see [theory of change graphic in the introduction](#)).

CapShift’s intervention focused on sharing peer-recommended giving opportunities—essentially, a database of donor-endorsed nonprofits. The Mesa’s intervention focused on online dialogue and peer connections—essentially, social networking. While the hypotheses were distinct, the ultimate goals of the two platforms were aligned: shifting the flow of philanthropic capital.

Testing two distinct functions might have helped us see how each one affected donor behavior separately. However, dividing The Mesa’s social features from CapShift’s giving opportunity aggregation limited users’ ability to connect and exchange information in equal measure.

***These features would likely have been more valuable in tandem.*** The ability to post ideas, questions, and other content *alongside* giving opportunities could enhance social connections in-platform. Seeing how a funder uses the more social and connective elements of the platform would lend context to the portfolio of grants that that funder shares; similarly, having visibility into a user's funding history would contextualize their other posts.

This was corroborated by conversations with both donor communities and platform users. On the CapShift side, FG and PN staff, as well as several of their members who used the platform, frequently noted their desire for more social elements on the platform. In particular, donor community staff wanted their members to be able to search for the profiles of other users, and members wanted to see more detail in others' profiles—and the ability to communicate with each other on platform—to help facilitate connection between like-minded peers.

The CapShift development team was open to eventually building out donor profiles and some social features on CapShift. But the existing technology wasn't designed for social features, and there wasn't enough time and resources to build those from scratch (especially given extensive customization on other features). For FG in particular, there was the added challenge of integrating profiles on Amplifier with FG's existing member profile platform, which they didn't want to duplicate on CapShift.

As for The Mesa, while the two users that ideas42 spoke with did not directly mention a desire for the ability to share giving opportunities, the lack of this feature was ultimately cited by Hispanics in Philanthropy (HIP) as one of their justifications for leaving the pilot program. The Mesa was built as a community platform to encourage peer-to-peer connections and sharing, and while HIP's desire to share opportunities directly on the platform was out-of-scope and suggested too late in the course of the project to be actionable, it nevertheless suggests that The Mesa may have benefited from that functionality.

### Overall, inconclusive evidence of short-term donor behavior shift

As noted above, it was unlikely we would observe changes in donor giving behavior during the course of the pilot, given the long-term nature of that outcome. However, proxy metrics that sought to capture short-term donor behavior change, including platform activity and qualitative measures of attitude shifts, were also inconclusive.

We observed this across both platforms, suggesting more broadly that HNW donors are rarely swayed by a single factor when deciding their funding strategies. Instead, their grantmaking is likely a well-organized process, driven by considerable momentum and careful planning. One FG donor shared, ***“I don't think it would help me looking for grantees because I have a very set strategy; we fund a lot of the same grantees year-after-year.”***

This observation is consistent with trends from our diagnosis interviews suggesting that donors, particularly HNW donors, rarely change their giving strategies or add new organizations to their portfolios. In fact, maintaining some strategic stability is often advised as best practice for donors; the trust-based philanthropy movement recommends multiyear funding when possible. Altering the direction of HNW grantmaking typically involves a complicated, time-consuming process influenced



by several variables; it's unlikely for donors to immediately shift their strategy upon discovering a new opportunity, even a promising one. Consequently, evaluating the effects of a platform like those in the MTM project is challenging, particularly when there is limited user engagement.

# INSIGHTS ABOUT PILOT DESIGN

---

**Z**ooming out from the individual platforms themselves, we also gleaned some insights from the broader context in which this pilot was designed and implemented.

## **HNW donor communities are unique ecosystems that are difficult to test in**

In addition to MTM, the donor communities all had other programming to promote, and marketing was essentially zero sum: attention on MTM communications meant less attention on other engagement opportunities. Donors were also less available and accessible than we'd hoped. Despite this, we did have success conducting limited user testing of prototypes and platform features (a less onerous, more focused ask of donors than adopting a whole new product).

It was also hard for communities to spare the staff necessary to design and launch a new product. Donor communities have limited resources, despite the relative wealth of their membership. In general, while HNW donors are comfortable paying for financial management, they appear much more reluctant to pay for philanthropic management services—a pattern observed across the sector.

The donor community staff that participated in the pilot cohort with the platforms and ideas42 tended to be operations and technical staff. From a tech development and integration perspective, this was critical for the pilot's success. However, these staff members had less familiarity with donor needs than those in donor-facing roles.

Finally, the two platform development teams each took very different approaches which created different challenges. One platform employed a “one-size-fits-all” approach that was less resource intensive but made it harder to align with community preferences. The other platform was open to customizing the product, but this flexibility led to a prolonged timeline that prevented iterative user testing and made comparative analysis difficult.

## **Donor reluctance to disclose giving data made evaluation challenging**

Beyond testing challenges, a significant hurdle to evaluation was gathering quantitative data from donors, who were reluctant to share specific numbers about their own giving. Our initial launch surveys seeking to collect data from donors about their giving behavior and platform engagement (with only two quantitative questions) received just 13 responses<sup>vi</sup> on average across each of the three partner communities (total membership per community ranging from ~150 to ~400).

---

<sup>vi</sup> See [Appendix](#).

## **Equity considerations & challenges: Lack of standardized and accessible metrics limited the inclusion of equity-related features**

From early on, centering equity was a priority for the pilot partners, as expressed in the first goal of the project charter: “Each Donor Network Grantee will engage its communities in the rapid prototyping and tailoring of a platform offered by a Platform Partner with the ultimate goal of increasing the quantity and quality of charitable giving to address global inequities.” However, there were significant challenges to realizing this goal, which were compounded by low uptake of the platforms.

Integrating equity-advancing features onto the platforms—like being able to tag organizations with certain characteristics—proved to be challenging, and the absence of these features limited the communities from being able to market their platform as an effective equity-advancing tool, rather than just a peer exchange space. This likely also contributed to low uptake.

***A widespread challenge in the field is the absence of a unified definition of “advancing equity,”*** which makes it hard to measure impact and gather relevant data. Consequently, the sector often relies on substitute measures, like demographic data on organizational leadership, to assess equity. However, tracking even these limited metrics is challenging without a standardized, industry-wide database of organizations meeting specific criteria. While some nonprofit databases are emerging, data still tends to be fragmented, proprietary, costly, missing much of the information donors seek, or difficult to integrate with new technology products.

This was a particular challenge for CapShift, which was predicated on being able to surface impactful organizations with certain characteristics—for example, organizations deploying a specific kind of strategic approach, or those led by/serving a particular demographic—to encourage donors to give to them. Given the lack of reliable, standardized data about the organizations that donors were recommending, it was impossible to build behavioral features (such as badges or tags, or even advanced search) that relied on this data.

CapShift considered circumventing this lack of data by enabling donors to “tag” their opportunity submissions with equity-related keywords and demographic information; however, placing the burden of cataloging demographic and impact details on donors was neither feasible nor responsible. The platforms did attempt to compensate by leveraging alternative sources of information, such as community staffers who are in close proximity to donors and nonprofits. But this was similarly challenging.

This lack of a reliable and accessible data infrastructure made it hard to operationalize equity objectively for all participants. Faced with the prospect of having to manually research and integrate equity data themselves, partners opted to deprioritize features that required it.

Finally, context-specific considerations (e.g., geography, politics, audience) revealed some misalignment across the communities. For example, The Mesa had integrated a number of equity-aligned features, such as including “trust-based philanthropy” as an aspirational practice for donors, and including certain issue tags in the search function. But one community felt the term “trust-based philanthropy” was too progressive, and might alienate users, while another community felt the platform language and search terms were not progressive or inclusive enough.

# RECOMMENDATIONS

---

The MTM platform pilot explored how HNW donors would engage with giving opportunities and other content provided by their peers on a digital platform. The results were mixed: donors appeared interested in content from their peers, but were reluctant to contribute content themselves. The effects of the pilot on donor giving behavior were inconclusive, largely because participation overall was low. While new solutions are still needed to unlock HNW philanthropic funding that addresses inequities, the pilot revealed several promising aspects worth further development. We know from the pilot that:

- ▶ **Donors want information about other donors:** MTM donors were primarily interested in learning about their peers' giving. This suggests an opportunity for sharing better data about donors, both at the individual level (donor profiles, giving history, recommendations) and in aggregate for peer benchmarking and comparison.
- ▶ **Compelling giving opportunity recommendations, from trusted, effective sources, are needed:** There is an infrastructure gap when it comes to comprehensive, reliable, and accessible information about nonprofits that centers how they make impact and advance equity. This makes it challenging to design consumer products that allow users to search or browse for opportunities and that facilitate curated discovery through recommendations. The source for these recommendations is unlikely to be solely donors themselves.
- ▶ **Information about donors and information about nonprofits should live in the same place:** The MTM pilot structure separated donor social features from giving opportunities and likely led to lower uptake than if the two elements had been combined on a single platform.

## Design Recommendations for Digital Platforms

A digital platform that combines donor profiles and giving opportunities could take a number of forms—from an adaptation of an existing product to something completely new—but it is unlikely to influence giving without being designed for the specific needs of the HNW donor context while also considering the differing approaches of DIY and assisted donors. Effective design elements and strategies may include:

**A directory of donor profiles exclusively accessible to other donors.** These profiles could have both qualitative and quantitative information about individual donors, including who they are (personal/professional bios, giving strategy/priority areas, group memberships/affiliations, etc.) and their giving and financial context (net worth, giving history, “favorite” nonprofits, etc.), as well as aggregate data for peer benchmarking and comparisons (sensitive information could be collected for aggregate reporting on peer benchmarks but not necessarily made public on individual profiles).

**“Quid pro quo” access that requires donors to onboard and complete a profile before seeing others’.** Donors will likely be reluctant to provide the information needed for the donor directory. However, effective design could prompt sharing. For example, showing donors only aggregate data until they connect with a specific peer (and thereby unlock personal details), or only allows donors to view benchmarks if they have submitted their own giving data.

**Hybrid social features that allow engagement but don’t require it for functionality.** While the static data in the profiles is critical for the value proposition of a directory, social features should be a bonus, not a requirement. User-generated content can appear to be a robust source of information. However, donors tend to engage in philanthropy content far less frequently than they might engage with a standard social network like Facebook or X. Considering different features of existing social networks is helpful:

- ▶ Broad publicly available information, like LinkedIn
- ▶ Privacy/exclusivity, like a WhatsApp group
- ▶ Industry trends and benchmarking data, like Zillow
- ▶ Recommendations and favorites, like TripAdvisor
- ▶ Networking and in-person engagement, like MeetUp
- ▶ Decision-making and discussion functionality for “closed door” communities, like local neighborhood parent forums or condo associations; these groups could be managed by donor networks or other client financial services (like DAFs)

**Embrace the role of social connection.** In the HNW donor space, relationships and trust are crucial. Events that bring donors and related staff together in person (like NCFP’s annual forum) are popular. Creating a link between in-person events and online features—such as a directory donors could browse before conferences to see who was attending—may increase engagement with a platform that also offers other giving features.

**Design for how donors give, not just how much.** Fundamentally, to influence giving, consider who is doing the searching, and what they are searching for. DIY donors, assisted donors, and advisors not only need different angles on similar information, but in some cases need different information altogether. For example, a donor directory is likely to attract both DIY and assisted donors. For assisted donors, that might be valuable enough, especially if the platform prioritizes networking functions. DIY donors, on the other hand, might initially join for the profiles, and stay for the giving opportunities.

**Recommendations carry significant weight.** Incorporating recommendations from peers and experts may help match donors to new organizations. Specialized recommendation tags, such as “hidden gems” could help validate impactful but lesser known organizations that risk being overlooked for funding by other donors. Organization profiles could also include badges featuring who recommended them, whether an expert or public figure, or another donor in the user’s network. This feature would allow donors to leapfrog between opportunities and donor profiles, especially if profiles feature a donor’s “top” organizations.

**Sourcing and curating organizations more effectively.** Building in curation that doesn't rely solely on donor recommendations is critical to ensure equity and effectiveness. Automated personalized curation—based on a donor's selected priority areas, for example—could help introduce donors to new organizations in familiar fields. Inviting trusted experts to curate lists of impactful organizations—such as asking public figures, local leaders, or even other nonprofits to recommend partners—could offer different lenses through which donors could search and discover opportunities.

**Extensive profiles of the organization are not critical,** and in fact including too much granular data might be overwhelming. But information about the organization's demographics, strategy, and compelling storytelling about impact is important if the aim of the platform is to shift donor giving toward equity.

**Customized search/filtering and manipulatable dashboards** may allow users to feel like they are putting their own stamp on the search. For advisors especially, having “levers” they can pull to conduct targeted searches and build bespoke client reports tailored to various needs and strategies, would be critical.

## Implementation Recommendations

**Build in donor engagement from the beginning.** “If you build it, they will come,” is almost never true. From the beginning, consider how donors will learn about and be motivated to engage with new tools. Effective, frequent marketing is one strategy. The Rule of 7 highlights the importance of a number and variety of impressions: direct communications (newsletters, website banners) is key, but consider other channels like word of mouth, peer recommendations, physical signage, events, or even text messaging—as long as the channel is appropriate for the audience, options are nearly endless. Equally critical is translating initial awareness and interest into productive usage, and build in an easy transition from intention to action. For example, building new behaviors *into existing workflows* is more effective than asking users to enroll in something new. Forward Global facilitated a grant-matching campaign for its members and required that members upload the giving contributions they wanted matched to Amplifier for them to be eligible. Submitting contributions was something donors were going to do *anyway*; by making the platform a required part of that behavior, it helped establish it as a critical piece of the community's infrastructure, rather than a separate tool they needed to remember to use.

Taking a donor profile directory as another example, uptake of that tool is more likely if it is integrated into existing donor community practices, such as using the donor profiles to share participant and attendee bios before a network's annual conference.

**Look beyond donor communities to reach HNW donors.** Donor communities, with their built-in audiences, seemed to be an ideal ecosystem into which to launch a new donor product. But given their need for customization and integration, the scalability of existing products is limited; communities are unlikely to market a one-size-fits-all third-party product with much enthusiasm as their value lies in providing highly bespoke services to their members.



Alternative channels to reach donor audiences include entities such as DAFs or other financial institutions, which often have big client lists but fewer donor-facing support services, and thus might be more willing to offer a ready-made external product that fills a gap. This could mitigate the customization and integration challenges faced by communities, though user testing could still be a challenge because financial institutions also avoid imposing on their customers' time.

***Explore creative alternatives to user testing new products and features.*** The importance of relationships in the HNW donor community means that traditional product testing methods like MVPs, focus groups, or A/B testing may not be effective due to the high value placed on members' time and the small size of the community. There are strategies that may help user-testing asks feel less burdensome: we had success in framing the request to donors as volunteering their time to help us as partners in innovation (leveraging the commitment to giving “time, talent, and treasure” that many donors make), and making it clear that we respected their time and feedback.

## IN CLOSING

---

**T**he Made to Measure platform pilot emerged to fill a gap in philanthropy that became apparent during 2020 at the start of the COVID-19 pandemic and the rise in global movements for racial justice: a lack of infrastructure for donors to search for and share guidance around giving to urgent needs. By the time the MTM project was scoped and being implemented by the cohort, more than a year later, there was less urgency. The goal had also shifted to encouraging HNW donors to give more equitably through exchanges with trusted peers. This was more of an evergreen goal than one rooted in the time-bound needs of 2020.

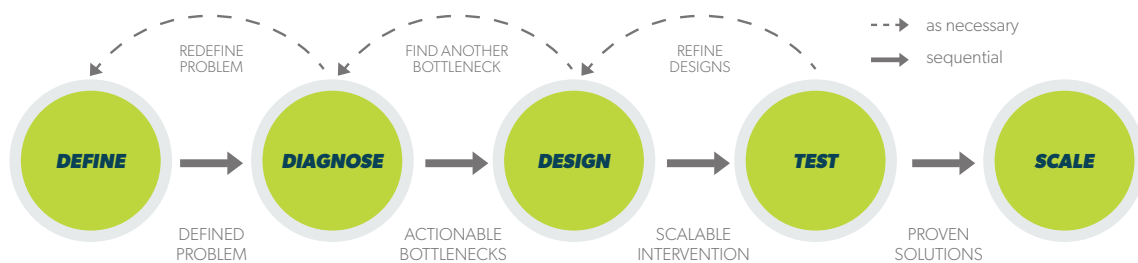
In pursuit of this goal, Made to Measure brought together a diverse set of partners dedicated to exploring whether, and how, a peer exchange platform could increase HNW giving toward global inequities. Platform uptake was lower than expected, so we could not reliably measure whether shifts to donor giving behavior occurred as a result of the platform pilot. However, the collaboration yielded a rich understanding of what digital platforms HNW donors may need, which can hopefully help inform new solutions.

*In the coming months, we will publish a separate report that consolidates our insights from across our U/HNW research and outlines the U/HNW donor barriers we have identified along with recommendations for the field that address those barriers. That report will draw on four ideas42 projects supported by the Gates Foundation: the Made to Measure platform pilot, the HNW Learning Agenda research project, a High Capacity Donor research project conducted with NCFP, and a project on Strengthening the Marketplace for Gender Equality Giving.*

# Appendix A: The Timeline

2020	2021	2022	2023	2024
<ul style="list-style-type: none"> <li>Start of COVID-19 Pandemic, Black Lives Matter protests peak</li> <li>Milken Institute, with CapShift, pilot Philanthropy Commons, a platform peer exchange pilot for institutional funders</li> <li>The Gates Foundation fields requests from HNW donors for funding opportunities</li> </ul>	<ul style="list-style-type: none"> <li>The Philanthropic Partnerships Team launches Made to Measure pilot</li> <li>Platforms, Donor Communities, and ideas42 are recruited to implement</li> </ul> <p>Diagnose</p> <ul style="list-style-type: none"> <li>ideas42 conducts donor diagnosis interviews</li> </ul>	<p>Diagnose</p> <ul style="list-style-type: none"> <li>Prototyping &amp; testing behavioral features</li> <li>Requirements gathering for technical build</li> <li>Development of activation and engagement strategies</li> </ul> <p>Test</p> <ul style="list-style-type: none"> <li>Initial user tests</li> <li>PN and FG platforms soft launch on CapShift</li> </ul>	<p>Diagnose</p> <ul style="list-style-type: none"> <li>Requirements gathering continues for HIP and FPN/ Collaboratory</li> </ul> <p>Test</p> <ul style="list-style-type: none"> <li>NCFP platform launches on the Mesa</li> <li>Platform data collection</li> </ul> <p>Evaluate &amp; Learn</p> <ul style="list-style-type: none"> <li>FG, PN, and NCFP launch donor surveys</li> <li>User interviews</li> <li>Partner interviews</li> </ul>	<p>Scale</p> <ul style="list-style-type: none"> <li>Final report publication and dissemination for field learning</li> </ul>

The project timeline drew on ideas42's methodology, shown below:



# Appendix B: Partner Summary





PARTNER ROLES / Partners	Partner Goals
<b>FUNDER</b>	
Bill & Melinda Gates Foundation, Philanthropic Partnership Team	<ul style="list-style-type: none"><li>Invest in innovative philanthropic infrastructure to increase funding for global inequities in giving</li></ul>
<b>PLATFORM PARTNERS</b>	
Provide online platform where HNW individual philanthropists could research, support, and connect to each other and charitable giving opportunities	
<b>CapShift</b> Platform focus on peer exchange of giving opportunities, tracking giving behavior	<ul style="list-style-type: none"><li>Develop and build innovative philanthropic infrastructure to advance equity in giving.</li><li>Pilot a platform that could be scaled to a broader client base.</li></ul>
<b>The Mesa</b> Platform focus on peer exchange of philanthropic expertise, advice, giving practices	
<i>Given the platforms' differing purposes/designs, the donor communities chose the platform that best served their community's goals. As such, each platform tested with 2 or 3 of the 5 donor communities.</i>	
<b>DONOR NETWORK COMMUNITIES</b>	
Educate and support donors in giving effectively to achieve charitable impact in collaboration with the communities that they serve	
Forward Global (FG) (fka The Philanthropy Network) Philanthropy Network of Greater Philadelphia (PN) Florida Philanthropy Network (FPN) via Collaboratory Hispanics in Philanthropy (HIP) National Center for Family Philanthropy (NCFP)	<ul style="list-style-type: none"><li>Build and test an innovative giving product for individual and institutional donor members.</li><li>Shift donor philanthropic practice to facilitate more giving towards global inequities.</li></ul>
<b>LEARNING AND EVALUATION PARTNER, PROJECT MANAGER</b>	
Integrate behaviorally informed features through diagnosis, design, and testing; project and stakeholder coordination.	
<b>ideas42</b>	<ul style="list-style-type: none"><li>Improve charitable giving and its impact through the application of our behaviorally informed designs on the platforms.</li><li>Gather insights and share lessons learned from this pilot with the broader philanthropic sector.</li></ul>

# Appendix C:

## Platform Designs and Features

The table below details a list of the features proposed to be developed in each MTM platform, and the status of each feature. Worth noting is the fact that the list below is much more extensive for CapShift than The Mesa because CapShift offered more customization opportunities. The Mesa handled the bulk of their designing in-house, inviting feedback at key moments in the development process, but rarely sharing wireframes with their donor communities and ideas42. In a desire to not develop three different instances for their three communities, The Mesa committed to a single product lightly customized for a broader HNW donor audience rather than extensively customized for the individual communities. On the CapShift side, ideas42 and the two donor communities were given the opportunity to play a larger role in CapShift’s requirements gathering and design process, across two extensively customized instances of the platform, and thus proposed a greater number of features for inclusion than were proposed to The Mesa.

*Colors represent the degree to which a design proposal was included in the final platforms. When a proposed feature was not implemented, or was implemented with modifications or limitations, the underlying reason is listed in that cell.*

-  Feature that made it in
-  Feature that made it in, with modifications or limitations
-  Feature that didn’t make it in [*Explanation for why the feature wasn’t included is specified in table*]
-  Feature not applicable for this platform (e.g. giving recommendations on the Mesa)

<b>Proposed Behavioral Features</b>		<b>CapShift</b>		<b>The Mesa</b>
<i>Section of Platform</i>	<i>Components</i>	<i>FG (Formerly TPW)</i>	<i>PN</i>	<i>(The same instance was developed for NCFP, FPN/Collaboratory, and HIP)</i>
Onboarding Experience and User Profiles	Personal/institutional values questions	Low priority for donor community		Low priority for donor communities
	Motivation and priority questions			
	Giving practices questions	Low priority for donor community		
	Giving strategies	Low priority for donor community		
	Goals and intentions questions	Low priority for donor community; Limited development bandwidth by platform partner		
	"Ask me about" questions			
	Profile completion progress bar			
Homepage	"My profile" glimpse	Limited development bandwidth by platform partner; Consensus low priority item		
	"Spotlight" opportunity			
	Giving recommendation carousels			
	Social recommendation carousels	Limited development bandwidth by platform partner		
	Stories and testimonials from the community	Lack of consensus among implementing partners; Limited development bandwidth by platform partner		
	Activity feed	Lack of consensus among implementing partners		
	Community activity summary	Limited development bandwidth by platform partner; Consensus low priority item		

- Feature that made it in
- Feature that made it in, with modifications or limitations
- Feature that didn't make it in [Explanation for why the feature wasn't included is specified in table]
- Feature not applicable for this platform (e.g. giving recommendations on the Mesa)

<b>Proposed Behavioral Features</b>		<b>CapShift</b>		<b>The Mesa</b>
<i>Section of Platform</i>	<i>Components</i>	<i>FG (Formerly TPW)</i>	<i>PN</i>	<i>(The same instance was developed for NCFP, FPN/Collaboratory, and HIP)</i>
Dashboard/ Feed	"My profile" glimpse	Limited development bandwidth by platform partner; Consensus low priority item		Low priority for donor communities
	Ongoing activity progress tracker	Limited development bandwidth by platform partner	Implemented outside platform, via emailed Google surveys	
	Summary of user's giving	Limited development bandwidth by platform partner		
	Comparison of user's giving to community average	Limited development bandwidth by platform partner		
	Summary of giving by "peers" (comparable users)	Limited development bandwidth by platform partner		
Dashboard/ Feed	Feed of user's recent activity	Limited development bandwidth by platform partner; Consensus low priority item		
	List of user's "followed" opportunities			
	Industry news	Limited development bandwidth by platform partner; Consensus low priority item		Limited development bandwidth by platform partner
Public (Other Users') Profiles	Summary of other user's giving			
	List of other user's "followed" opportunities	Limited development bandwidth by platform partner; Consensus low priority item		
	Badges (achievements)			Limited development bandwidth by platform partner;

- Feature that made it in
- Feature that made it in, with modifications or limitations
- Feature that didn't make it in [Explanation for why the feature wasn't included is specified in table]
- Feature not applicable for this platform (e.g. giving recommendations on the Mesa)



<b>Proposed Behavioral Features</b>		<b>CapShift</b>		<b>The Mesa</b>
<i>Section of Platform</i>	<i>Components</i>	<i>FG (Formerly TPW)</i>	<i>PN</i>	<i>(The same instance was developed for NCFP, FPN/Collaboratory, and HIP)</i>
Engagement Features	Pop-up questions			
	Email reminders			
	Goal-setting tool			Wizard with preset options, no free text field(s)
	Suggested connections			Limited development bandwidth by platform partner
	Create/share posts (with text, image, URL, attachments)			
	Comment on posts			
	Events (create, post, in-platform RSVP)			

- Feature that made it in
- Feature that made it in, with modifications or limitations
- Feature that didn't make it in [*Explanation for why the feature wasn't included is specified in table*]
- Feature not applicable for this platform (e.g. giving recommendations on the Mesa)

# Appendix D: Summary of Project Activities

## Project Management

- ▶ Ongoing project management with all donor communities and platform developers for the duration of 2022 and 2023
- ▶ 5 convenings of all project partners
  - November 2021 (virtual)
  - February 2022 (virtual)
  - May 2022 (virtual)
  - November 2022 (virtual)
  - January 2023 (in-person)

## Design

- ▶ 6 co-design sessions with project partners
- ▶ 4 behaviorally-informed wireframes and mockups
  - Onboarding Questionnaire and Profile - *both platforms*
  - Homepage - *CapShift Only*
  - User Dashboard - *CapShift Only*
  - Pop-up Survey Questions - *CapShift Only*

## Evaluation

- ▶ 14 interviews with platform donor-users
  - 5 interviews with Forward Global members (1 repeat interviewee)
  - 7 interviews with Philanthropy Network members (2 repeat interviewees)
  - 2 interviews with National Center for Family Philanthropy members (no repeat interviewees)
- ▶ 8 interviews with project partners
  - 1 interview with CapShift staff
  - 1 interview with Forward Global staff
  - 1 interview with Philanthropy Network staff
  - 1 interview with The Mesa staff
  - 2 interviews with National Center for Family Philanthropy staff
  - 1 interview with Florida Philanthropic Network staff
  - 1 interview with Collaboratory staff

- ▶ 39 survey responses from platform donor-users across 3 donor community surveys
  - 16 from Forward Global
  - 16 from Philanthropy Network
  - 7 from National Center for Family Philanthropy
- ▶ Data compilation and analysis of
  - CapShift monthly usage reports
  - CapShift Google Analytics data
  - The Mesa monthly usage reports

Details of project efforts and data collected available upon request: [info@ideas42.org](mailto:info@ideas42.org)

# Appendix E: Activation & Engagement Strategies Worksheet

## DONOR COMMUNITY ACTIVATION & ENGAGEMENT STRATEGIES

---

ideas<sup>42</sup>

### Introduction

We're developing a digital platform to host donor communities, leveraging community knowledge and collaboration to help donors act as even more thoughtful and effective givers. In order for this platform to succeed, we need community members show up in the digital space and engage with their peers at a high enough frequency to maintain a dynamic community.

However, even the most excited donors may have trouble following through on their intention to engage online – a common challenge for new tools. Insights from behavioral science help us to understand the likely “behavioral barriers” and inform strategies to address them.

This document is a starting place for community staff to develop tailored approaches to overcome behavioral barriers and encourage ongoing user engagement. The barriers and strategies listed here are based on ideas42's previous work and research, as well as the body of literature from the field.

### How to use this document

1. Think about your community and the barriers your members may face in onboarding to a new digital platform. Which have you experienced before? Which are most likely to be a challenge?
2. Select a few recommended strategies based on the barriers that you will most likely need to address. Choose strategies that align with your community's needs and capacity. We encourage you to build on the suggestions list here and draw on your knowledge of your unique community and solutions that have worked in the past.
3. Begin planning for how these strategies will be carried out during the launch and ongoing engagement with the platform. Consider who will be responsible and what time and resources you will need.

ideas42 will discuss this in more detail with each community to help you identify relevant barriers and design custom solutions for your audience. In addition, communities will have the opportunity to share ideas and plans with other communities in the MTM cohort.

## Behavioral Barriers to Platform Use

We've identified four behavioral barriers to action that are likely to emerge when onboarding users onto a new digital tool. These barriers are paired with some of the specific psychological principles that underpin them. This understanding helps us design better strategies to target these potential barriers. Not all of these may be relevant to all users, and this list is not exhaustive.

Take a look at the table and mark the barriers that resonate with your experience in your community. What other barriers have you seen?

The colored circles will help you match these barriers to strategies in the next section.

<ul style="list-style-type: none"> <li>● Users make <b>negative assumptions</b> about the platform that discourage them from signing on.           <ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Ambiguity aversion</u>: the disinclination to do things that we don't have a clear understanding about</li> <li><input type="checkbox"/> <u>False mental models</u>: how mental structures of prior knowledge lead us to inaccurate assumptions</li> <li><input type="checkbox"/> <u>Negativity Bias</u>: when things of a more negative nature have a greater effect on one's psychological state than equally intense neutral or positive things</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Users believe the platform will require <b>too much work</b> to get started with, so they avoid signing on.           <ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Procrastination</u>: voluntary delays to an intended action despite knowing that we will probably be worse off for the delay</li> <li><input type="checkbox"/> <u>Scarcity</u>: the experience of a relative lack of resources (time, money, etc.), which tends to deplete mental resources and lead to poorer-quality decision-making</li> <li><input type="checkbox"/> <u>Hassle factors</u>: the inconveniences and/or obstacles that impede someone from taking a desired action</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>● Users are <b>not in the habit</b> of using the platform, so they forget or don't know when to log on.           <ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Status quo bias</u>: a preference for the default option</li> <li><input type="checkbox"/> <u>Present bias</u>: favoring immediate rewards at the expense of our long-term goals</li> <li><input type="checkbox"/> <u>Saliency</u>: the prominence of a person, thing, or trait compared to other elements in the surrounding environment. It determines which information to focus on and what to ignore.</li> <li><input type="checkbox"/> <u>Limited attention</u>: the inability to process information that would normally be easily processed when attentional capacity is stretched</li> <li><input type="checkbox"/> <u>Habit formation</u>: the formation of a routine of behavior that is repeated regularly and tends to occur automatically after exposure to a specific cue</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Users <b>don't know how</b> to do what they want to do on the platform or don't think the platform is the right place for what they need.           <ul style="list-style-type: none"> <li><input type="checkbox"/> <u>Saliency</u>: the prominence of a person, thing, or trait compared to other elements in the surrounding environment. It determines which information to focus on and what to ignore.</li> <li><input type="checkbox"/> <u>Ambiguity aversion</u>: a preference for known risks over unknown risks</li> </ul> </li> </ul>

Example:

### Behavioral Barrier:

- Procrastination

### Barrier

Mary thinks that setting up her platform profile is going to be a **lot of work**, so she procrastinates doing it. Every time she is reminded of something she'd like to do on the platform, she decides to **put it off** until she has more time later to *really* sit down and do it.



### Strategy

You decide to **host an event** at which community members can ask questions about the platform to a staff member in real time and the group takes some time together to fill out their profiles. Doing this together allows Mary to set aside **scheduled time to focus on this task** and having a live group event means she is **held accountable** to that time.



### Outcome

Mary and the other event attendees **fill out their profiles** and **become active members** of the platform **at the same time!** They were able to **have their questions answered** during the process which gave them a better sense of what comes next, and they have a **new cohort of peers** to learn from and help keep them accountable to their goals.

## Strategies

Thinking back to the barriers you identified earlier (summarized here with their corresponding colors), use the colored dots to see which strategies may help you address the challenges you anticipate seeing in your community. For example, if you identified "Negative Assumptions" as a common barrier, search for strategies with an orange dot next to them. It's also possible a single strategy might address multiple barriers, as illustrated by the ones with more than one dot.

When identifying strategies, it's also important to consider the unique preferences and constraints of your community members and staff. For example, here are some questions you might ask yourself: do your members need more assistance with technology? What capacity constraints do staff members face? Do your members prefer individual assistance, or are they comfortable working in groups?

These strategies provide a jumping off point to start thinking about the best way to address the most common barriers you anticipate encountering, and they can and should be adapted and developed further for your community. It's not realistic (and would be overwhelming) to plan to deploy all of these, so **we recommend selecting 2-4 strategies** that you think will be most effective for your audience. **Use the column on the left to mark strategies you're interested in trying. You can also add additional ideas in the empty rows below.** We'll help you make a plan to tailor them to your community and implement them effectively.

- **Negative assumptions:** ambiguity aversion, false mental models, negativity bias
- **Too much work:** procrastination, scarcity, hassle factors
- **Not in the habit:** status quo bias, present bias, salience, limited attention, habit formation
- **Don't know how:** salience, ambiguity aversion

### Synchronous Use/Training

Mark Your Interest	Behavioral Barrier(s)	Strategy
	● ●	Host an event during which members are onboarded, trained on the platform, and fill out profiles
	● ●	When community members contact staff about the platform, go through the platform together
	● ●	Bring the platform into conversations and meetings that donors are familiar with
	●	Have community staff help with sign on and offer platform tours
	● ●	During onboarding, have donors write or save credentials in a place that is easily accessible (e.g. google passwords, day planner)
	● ●	Provide office hours with staff to walk through sign-up and profile completion 1:1



- **Negative assumptions:** ambiguity aversion, false mental models, negativity bias
- **Too much work:** procrastination, scarcity, hassle factors
- **Not in the habit:** status quo bias, present bias, salience, limited attention, habit formation
- **Don't know how:** salience, ambiguity aversion

### Reminders

Mark Your Interest	Behavioral Barrier(s)	Strategy
	●	Remind users to return by sharing what different profile completion milestones unlock on the platform
	● ●	Send reminders and newsletters or other communications to remind donors about the purpose of the platform
	●	Use social norms/peer influence to motivate action: e.g. "X% of your fellow donors have already signed up" or "profile completion has increased by Y% since last week"
	●	Have a specific, well-known, credible donor reach out with a reminder
	● ●	Provide regular reminders with specific actions donors can take or recommended timely content
	●	Send automated reminders to log on at a regular cadence

### Salience

Mark Your Interest	Behavioral Barrier(s)	Strategy
	● ●	Create events, podcasts, talks, etc. after the enrollment periods to generate a sense of purpose and encourage users already on the platform to explore
	●	Create a sense of urgency by setting time-bound actions: e.g. monthly challenges, actions to take before an event, office hours, or urgent funding goals
	●	Teach donors how to save login credentials in google, during onboarding have donors write or save credentials in a place that is easily accessible
	● ●	Provide link to platform in all community communications

- **Negative assumptions:** ambiguity aversion, false mental models, negativity bias
- **Too much work:** procrastination, scarcity, hassle factors
- **Not in the habit:** status quo bias, present bias, salience, limited attention, habit formation
- **Don't know how:** salience, ambiguity aversion

### Narrative/Messaging

Mark Your Interest	Behavioral Barrier(s)	Strategy
	● ●	Give the sense of exclusivity: e.g. frame the platform as a perk of membership or provide exclusive content on the platform for those who have joined
	●	Highlight the impact of the platform: e.g. impact stories from donors or share data on peer-to-peer connection
	● ●	Provide a FAQ about the platform and over-communicate about how to use the platform
	● ● ●	Social proof: e.g. encourage platform champions to join first and promote the ease of use; promote the value of the platform, emphasizing what makes it unique and how it will help the donor
	● ●	Give a preview of the simple steps to login and show how simple it is to navigate the platform
	●	Highlight that the platform is available 24/7
	●	Use communications best practices in activation emails (see attached ideas42 Communications Audit Checklist)
	●	Make it clear that profile questions are non-binding and meant to assist users in enhancing their philanthropy
	● ●	Endow a sense of progress in conversations about past platform use (e.g. "on X date, you said you were interested in these activities, since you've already explored the platform, created a profile, and expressed your values, next check out content that aligns with your interests!")
	● ● ●	Frame giving/learning/engagement as an investment in change

### Content & Use

Mark Your Interest	Behavioral Barrier(s)	Strategy
	● ● ●	Use the platform as the primary information source: e.g. users submit questions to staff and track responses, staff provide answers to FAQs, users ask questions of other donors, and groups set goals and share opportunities

	●	Reward the earliest platform users: e.g. provide content or events for the first joiners or give them access to test new features
	●	Develop guides based on specific user journeys: e.g. what to do if you want to get more involved with a specific causes or how to start connecting with members who have different interests from you
	● ● ●	Create a regular reason to log on to the platform: e.g. provide new content on a regular cadence, ask donors to log on and take a certain action on a regular cadence (e.g. set new goals every quarter or review and update personal reflection exercises)
	●	Make platform services "special," high quality, such as curated opportunities and curated peer connections

## What to do next

As mentioned before, this list is not exhaustive. Use your personal knowledge of the specific needs of your community to build on these strategies and come up with other solutions for your unique context.

You're also not on your own! ideas42 is here to partner with you through each step of this process from identifying barriers to implementing strategies. We'll also rely on the full MTM cohort of donor communities to learn about what strategies are working well and which aren't to continually hone our collective toolkit.

We're looking forward to meeting with you soon and going forward to discuss the activation and engagement strategies you're interested in testing.

# Appendix F:

## ideas42 Communications Audit Checklist

### Communications Audit Checklist



#### 1. Grab attention

- Formatting:** Does the most important information stand out? (Use the f-pattern, bolding, headers, and colors to emphasize key information)
- Relevance:** Is the information shared necessary and clearly valuable to the reader?
- Appropriate time:** Is the message sent when the recipient is likely to take action?
- Tone:** Does the tone fit the message? Does the message feel personal and positive? Is it blaming the reader?

#### 2. Know your audience

- Trust:** Is the message building a one-on-one relationship? Does the sender seem like they have the reader's best interest in mind?
- Authenticity:** Is the message striking an authentic tone? Do the communication and sender seem credible?
- Social identity:** Are relevant social identities highlighted and being leveraged?

#### 3. Make it easy

- Ease of processing:** Is the key message easy to understand? Is there any unnecessary technical language?
- Insert graphics:** Can you replace text with a simple infographic?
- Reduce hassles:** Is taking action perceived as easy?
- Help:** Is sincere help offered?
- Endow progress:** Are easy tasks upfront? Have readers already completed any tasks?

#### 4. Inspire action

- Salience:** Have you emphasized the benefits of responding or the consequences of not responding?
- Social norms:** Is there a popular norm people can follow?
- Checklist:** Are next steps summarized succinctly? Are tasks longer than minutes?
- Planning and commitment:** Have you prompted people to schedule time to complete complex tasks? Can you get them to commit upfront?
- Deadline:** Is there a clear, close deadline?

