GENEROSITY BY DESIGN

DESIGNING THE DONOR CONTEXT FOR BETTER GIVING

ideas42

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These four guides + toolkit are part of our Generosity by Design series—a set of practical resources created to support philanthropy practitioners who play a role in designing the donor experience. Whether you're a DAF manager, a philanthropic advisor, a nonprofit leader, part of a giving platform team, or anyone else working with donors, these guides offer insights to help you understand and shape how donors give.

Grounded in behavioral science and real-world practice, the guides offer an overview of the theoretical background alongside evidence-based strategies to engage, support, and move donors toward more intentional, impactful giving throughout their giving journey.

ATTENTION & DISCOVERY

How to ***capture donor attention*** and help them discover effective changemakers—without overburdening organizations who can least afford it

CURATION & PERSONALIZATION

How to make it ***easier (and more delightful) for donors to discover*** the right set promising nonprofits that resonate with them and align with their values and purpose

FRAMING & CHOICE ARCHITECTURE

How to ***highlight and organize*** the way information and choices are presented to make it ***easier for donors to choose*** where to give and be satisfied with the choice

REFLECTION & FEEDBACK

How to shape norms around and provide opportunities for feedback and reflection to ***improve giving practice*** and impact

COMING SOON!

Generosity by Design Toolkit

An interactive toolkit of hands-on strategies organized by audience and use case to help you support the donors you work with to be more generous and impactful in your specific context.

Sign up here *or email giving@ideas42.org to receive the toolkit when it's ready.*

Behavior & Giving

We often think about behavior change as if we're programming robots—do X, get Y result.
But humans are wonderfully, frustratingly complex, and human behavior is often paradoxical.

You can't simply press a button and make someone start jogging, quit smoking, or give to charity. What you can do is tweak the environment, thoughtfully design the choice architecture, remove barriers to action, and make the most important information the most salient. The real trick isn't about forcing change, it's about making the desired behavior feel like the path of least resistance.

Applied behavioral science—also known as behavioral design—is the practice of using insights from the study of human behavior to understand the context and improve the effectiveness of programs, products, and policies. By identifying behavioral barriers and designing evidence-based solutions, we help our partners create systems that work better for real people. In the giving space, we apply a behavioral lens to advance four goals: more intentional and generous donors, well-resourced impactful nonprofits, stronger philanthropic infrastructure, and more funding to the most pressing issues.

Glossary

Below are some key concepts and psychologies that are foundational to behavioral design and particularly relevant in the giving context. When we talk about context in behavioral science, we mean the environment or situation in which decisions are being made. Because our brains are thinking so fast most of the time, small features of our context have a profound effect on our behavior. **Context can refer to:**

- Our physical or built environment.
- The availability (or scarcity) of finite resources like time, money, or food.
- The social or cultural context in which we're living—that is, the predominant behaviors and norms that influence us.
- The choices we see—this includes how choices are presented to us or what is salient in our physical environment.
- Our mood, energy levels, or emotional state.

Intention-Action Gap

When someone's actions don't match their values, attitudes, or intentions. For instance, having an intention to give but not following through on it. While not strictly a "psychology," this is a key concept in behavioral design, which is meant to help people follow through on their *existing* intentions, rather than manufacture intent or need (which is essentially marketing).

Warm Glow

If you've ever experienced a rush of feel-good vibes after donating to charity, you've experienced what researchers call the "warm glow" effect. This "warm glow" doesn't only apply to charitable giving. Voting, volunteering, or any prosocial behavior can trigger similar emotional rewards.

Limited Attention

Because of limited attention, we can only respond to a given number of features of our environment at any point in time, and we often don't notice what we don't expect.

Present Bias

Our tendency to favor immediate rewards at the expense of our long-term goals. The giving space is especially challenging because there are few deadlines.

Choice paradox

Paradoxically, too much choice can be paralyzing, and our inability to compare choices makes it harder to choose and harder to be satisfied with our choices.

Hassle Factors

Because of hassle factors, small obstacles can have an outsized impact on behavior—and unfortunately the giving space is rife with hassles and ambiguity.

Identity and Feedback

We act in accordance with our identities and respond strongly to feedback about our behavior. Who we are, or who we think we are, matters in how we decide to behave.

Social norms & influence

What we see other people doing, or what society expects us to do, is very powerful! Yet, the giving space is notably absent of clear norms around when, how much, and how to give, making it a confusing space for donors.

Emotions & Affinity

Our emotions can control our behavior, even without us knowing, or when we don't want them to. We get a warm glow from giving. We are also more likely to favor those who we are familiar with or that are more like us.

Attention & Discovery

Consider the last time you gave to a new charity or nonprofit—how did you hear about the organization? Did a friend or colleague mention a fundraiser they were involved in? Did you see a post on social media? Were you actively searching for a cause or did one catch your eye? However it happened, something captured your attention and led you to discover that new organization.

Unlike for-profit companies, which invest heavily in advertising to capture consumer attention (and dollars), most nonprofits have limited marketing budgets, and don't sell a tangible product. With commercial goods, we encounter products constantly—on shelves, in people's hands, in the media, or endorsed through social norms around what is popular or fashionable. These cues create familiarity and breed trust. While a few bigger nonprofits enjoy brand recognition, they aren't as salient as consumer brands in everyday life. For nonprofits, there are few social norms and almost no transparency around how much people give, and to what organizations.

So, nonprofits have to capture our attention and spark discovery in other ways. Beyond word of mouth or physical proximity, there are a few options. There is direct-to-donor outreach, "B2C" strategies like mailers, email, and social media ads. And then there is "B2B2C," where intermediaries such as giving platforms, charity evaluators, DAFs, or philanthropic advisors serve as a bridge between donors with nonprofits.

**While behavioral science clearly defines "attention," we use the term "discovery" to describe a specific subset of attention-related dynamics. This distinction helps us design and develop more nuanced strategies for donors.*

What do we mean by attention & discovery?

Paying ***attention*** is, at its core, the act of noticing—when something breaks through the noise of daily life and enters our awareness. This can happen intentionally, when you deliberately focus on something, or unintentionally, when something external unexpectedly captures your awareness. In the donor context, capturing attention might mean surfacing a nonprofit or cause in a moment when the donor wasn't actively looking for it. It's often driven by salience, novelty, emotion, or disruption. Attention is the gateway to engagement, but it's fleeting—capturing it requires standing out, not necessarily being relevant (yet). Think of attention as "Hey, look at this!"—a novel stimulus that interrupts the default flow. It could be a flashy postcard in your pile of mail, a canvasser on the street, or a well-curated list on a giving platform.

Discovery is the moment when something specific emerges from within an already-attended context as particularly interesting, relevant, or worth pursuing. It sits under the umbrella of attention. In other words, you might already be paying attention in a more general sense, and then something specific jumps out and sticks. For example, a donor might already be in a "warm" mode of exploration—browsing a giving site, scrolling a curated list, or engaging with a platform—then discovery happens when one particular organization, cause, or story captures deeper interest. It might be driven by personal resonance, emotional appeal, novelty within context, or smart presentation. Think of discovery as, "this one caught my eye"—a moment of emergence from within an already active attention field. If attention is more like awareness, then discovery is more like surprise and delight.

Here's how you might apply these strategies

Attention and discovery strategies are a first step in engaging individuals early on in their giving journey, and are particularly well-suited for:

- When an individual is still undecided about whether to give
- Moments when giving may not be top of mind
- A donor is thinking about giving but undecided about what to give to
- A donor has just given and is still in a "warm" state and receptive to new opportunities

Who can use feedback & reflection strategies?

Anyone who is interacting with donors in their giving journey can help shape donor behaviors through attention and discovery, whether you are...

Helping donor clients discover issues and organizations that align with their values, such as **advisors**

Designing and managing the channels through which donors can search and discover organizations, such as **giving platforms or DAF managers**

Soliciting the donor directly, such as **nonprofits**

How can feedback & reflection help you engage donors?

DESIGNS

ATTENTION *designs* can help donors:

- Help turn non-donors into donors
- Make giving opportunities more salient—or visible—to donors or prospective donors
- Encourage donors to give more often than they otherwise would unprompted

DISCOVERY *designs* can help donors:

- Help close the intention-action gap between an individual intending to give and actually giving
- Help donors identify and give to opportunities that are aligned with their preferences or values
- Expand a donor's mental model—or understanding—of a cause area or problem

STRATEGIES

These strategies could look like:

- Sending emails or mailers to a list of past donors
- Featuring emotionally compelling visuals or headlines to draw attention to a cause or organization
- Placing giving prompts in unexpected or high-traffic environments (e.g. donor portals, checkout pages, newsletters)
- Highlighting time-sensitive or culturally relevant giving moments (e.g. Giving Tuesday, crisis response, local elections) and their link to a specific organization
- Using social proof to draw attention to organizations trending among other donors ("Most Supported Today" or "Popular in Your Area")
- Using contrast, motion, or strong design elements to make giving calls-to-action stand out within crowded interfaces

These strategies could look like:

- Creating short, eye-catching lists of organizations around urgent or timely themes ("Responding to Recent Floods") or based on donor location, past behavior, or stated interests ("Urgent Needs Near You" or "New in Climate Action")
- Recommending organizations based on what similar donors support ("Donors who gave to X also gave to Y")
- Recommending organizations based on what that donor has supported ("You gave to X, would you consider giving to Y?")
- Tagging organizations with identity- or value-based labels like "Women-led," "Innovative," or "Local to You"
- Allowing donors to save, bookmark, or "follow" organizations for later action or ongoing discovery
- Spotlighting a different organization or theme each week to introduce variety without overwhelming donors

Both could be paired with:

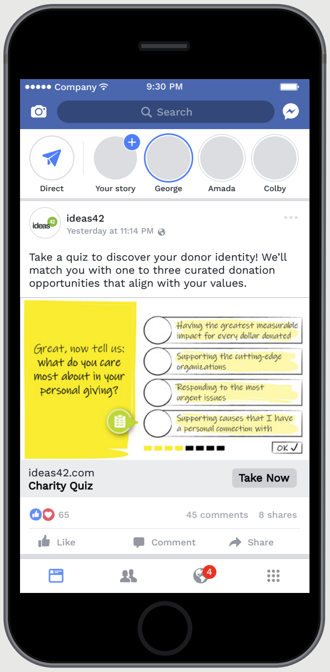
Curation strategies (e.g. themed lists, social proof, expert-curated) • Social proof strategies (e.g. "Popular in your network" or "Most supported this week") • Framing & choice architecture strategies (e.g. featured placement, smart defaults, value-based tags) • Feedback & reflection strategies (e.g. "You've supported X—consider Y next")

CASE STUDIES

Here's how ideas42 has used these strategies

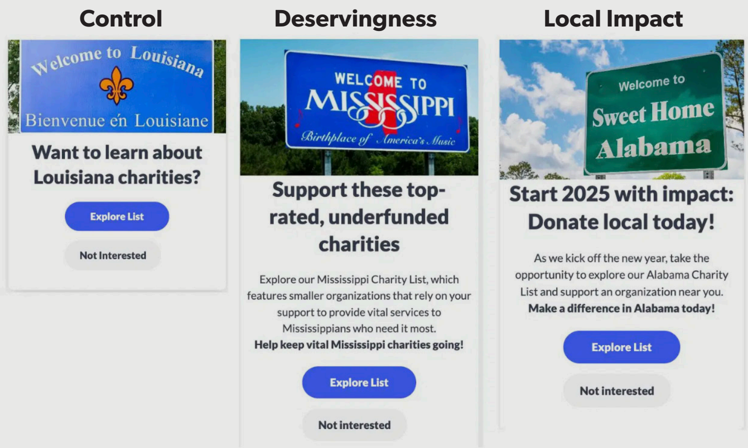
Over the years, ideas42 has designed tools that leverage attention & discovery to help donors make giving decisions that align with their goals and values:

1 ***Charity of the Month Subscription Box:*** A personalized quiz—advertised through Facebook ads to capture the attention of non-donors—that recommends personalized charities.



2 ***EquityBoost:*** Alerting donors who have already given to large charities about smaller, under-resourced, related organizations can unlock new gifts toward these recommended charities.

We're looking for partners to scale this concept. Let us know if you would be interested in trying this in your context.



Here's why these strategies work:

What are the main psychologies at play?

Limited Attention/Bounded Rationality

Our cognitive resources are limited, so we can only attend to a few things at once. As a result, we often rely on mental shortcuts and simplified decision-making processes rather than thoroughly evaluating all available information. This is a key concept in behavioral science.

Salience Bias

We notice things that are visually, emotionally, or socially prominent. To "capture" our attention that may be attending to something else, a stimulus must stand out. This means that our attention is "attracted to" flashy or emotionally relevant information.

Availability Heuristic

We judge something as more important or relevant if it easily comes to mind. Because our memory is shared by recent exposure, vividness, or emotional impact, this can lead to overestimating the frequency or significance of certain events.

Affective Heuristic

Emotions influence what we pay attention to and how we evaluate it. When we "feel" strongly about something we are more likely to perceive it as true or meaningful.

Novelty Effect

New or unexpected stimuli capture our attention more than familiar ones. This preference for the new can temporarily boost engagement of interest, but the effect often fades as the stimulus becomes more routine. Interestingly, this can transition into **Familiarity Bias** or **Mere Exposure Effect**—our tendency to prefer what we know—so as the novel becomes familiar, it can also become favored.

Social proof

When a person is in a situation where they are unsure of the correct way to behave, they will often look to other people for clues concerning the correct behavior. We're more likely to notice and follow what others are doing.

Framing effect

The framing effect is when our decisions are influenced by the way information is presented. Equivalent information can be more or less attractive depending on what features are highlighted and can influence which are noticed and pursued. *See also* *Priming Effect*, *Choice Architecture*.

Mini Literature Review

1. This research suggests that the information-processing capacity of young adults is around seven elements, which he called "chunks", regardless of whether the elements are digits, letters, words, or other units. At more than seven "chunks" we start to see a decline in the ability to attend to the information presented. Miller, G. A. (1956). "The magical number seven, plus or minus two: Some limits on our capacity for processing information." *Psychological Review* 63 (2): 81–97. CiteSeerX 10.1.1.308.8071.

2. Pashler explains that attention isn't just one single thing—it's an umbrella term describing how our minds choose, focus on, and filter information. Think of it like a spotlight: sometimes it shines steadily on one object, sometimes it spreads or jumps around. Although our senses can soak up tons of information at once, not everything gets fully processed. There's often a central bottleneck where your brain makes decisions or retrieves from memory one thing at a time. Pashler, Harold (1998). *The Psychology of Attention.* MIT Press.

3. This study shows that our goals—like trying to remember something or form an impression—can be activated without us realizing it. Researchers repeated two classic psychology experiments where participants were usually told what to focus on, but instead, they used subtle cues. People behaved as if they had received clear instructions, suggesting that our brains can "turn on" goals just by picking up on cues around us—even if we're unaware. Chartrand, T. L., & Bargh, J. A. (1996). Automatic activation of impression formation and memorization goals: Nonconscious goal priming reproduces effects of explicit task instructions. *Journal of Personality and Social Psychology*, *71*(3), 464–478.

Curation & Personalization

Think about the last time you shopped online for something like a blender. You had a general idea—something reliable, maybe good for smoothies—but weren't sure which model to pick. So instead of wading through thousands of options, you searched "best blenders" hoping a trusted source had narrowed it down.

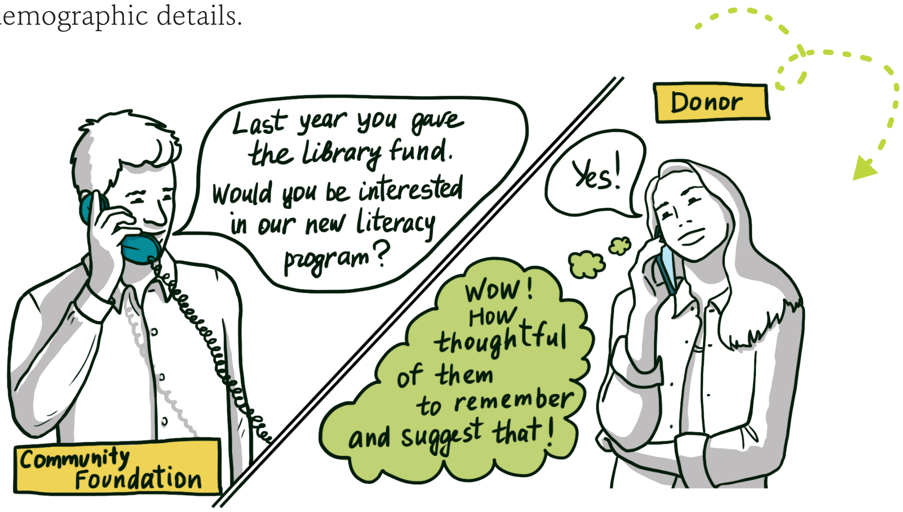
That's curation: someone else filtering the noise to give you a shortlist. But even then, choosing can be hard. That's where personalization comes in—maybe the article flags which one's best for small kitchens or margarita lovers, helping you find the one that works for you.

The same is true in the giving space. With over a million active charities in the United States, selecting organizations to support can be an overwhelming experience for many donors. Too many options, especially when they are hard to compare, can lead people to fail to choose at all. Even facing a manageable number to choose from, selecting among those can be challenging if the donor isn't sure who to trust, or which are doing the best work. Curation reduces the overwhelming number of nonprofits to a thoughtful few. Personalization goes further, surfacing the ones that align with a donor's interests, values, and goals—making it easier to choose where to give with confidence.

What do we mean by curation & personalization?

Curation is a term that originated in the art world, where museum curators select and organize works to shape a viewer's experience—often around a subjective point of view, but sometimes around more objective criteria. As digital platforms have grown more complex, "curation" has been adopted to describe how content—like products, media, or nonprofits—is thoughtfully selected and presented to guide user choice and reduce choice overload. The experience of being inundated with choice and struggling to differentiate between options can be a paralyzing one. Curating a select set of options is an effective means of not just breaking that paralysis and encouraging choice, but also sharing a perspective. Curation is most effective when there is a clear rationale for how the curated subset of options was selected. While algorithms often do this work, curated choices from trusted humans can be highly effective in cutting through the noise.

Personalization refers to curation that has been tailored specifically for the audience, often based on information that is available about an individual, such as their preferences, behavior, or characteristics. While curation narrows choices for everyone, personalization goes a step further—adjusting that curated set to match what's most relevant or appealing to a specific person or audience segment, often using data like past actions, stated interests, or demographic details.



Here's how you might apply these strategies

Curation & personalization strategies are well-suited for when:

- You've already initially captured a donor's attention and are trying to highlight a particular aspect of the choice set
- You're working with a donor who is motivated to give but struggling to make a decision
- You want to steer donors in a certain direction or encourage donors to take a specific action
- You want to inform or educate donors about a specific issue or a range of organizations

Who can use curation & personalization strategies?

Anyone who is interacting with donors in their giving journey can help shape donor behaviors through curation or personalization, whether you are...

- Helping donor clients choose where to give, such as **advisors**
- Designing and managing the channels through which donors can browse and choose organizations, such as **giving platforms or DAF managers**
- Soliciting a donor directly, such as **nonprofits**

How can curation & personalization help you engage donors?

DESIGNS

CURATION *designs* can help donors:

- Give to and/or learn about new/different organizations, issue areas, or approaches
- Feel more confident in their gift
- Better understand the impact of their gift

PERSONALIZATION *designs* can help donors:

- Give to and/or learn about new/different organizations, issue areas, or approaches
- Reflect on and expand their own giving
- Better understand the giving space

STRATEGIES

These strategies could look like:

- Curating a list of nonprofits that all tackle different aspects of the same issue
- Curating a list of impactful orgs based on topical categories or characteristics (e.g. "BIPOC-led," "Grassroots," "Popular right now" or "Small but Mighty")
- Using experts or public figures as curators
- Curating a "starter set" of nonprofits for new donors unfamiliar with a cause area
- Offering a list of high-impact organizations vetted through a specific evaluation framework (e.g. cost-effectiveness or transparency)
- Highlighting nonprofits that are locally based or serving the donor's own community
- Presenting a rotating "Editor's Picks" or "Staff Favorites" list to keep content fresh and engaging

These strategies could look like:

- Recommending a nonprofit that is similar to organizations that a donor has given to in the past
- Recommending a nonprofit that does complementary work indirectly impacting the issues that the donor cares about
- Recommending a nonprofit that receives little funding from a donor's peers but is aligned with the donor's interests
- Surfacing nonprofits whose stories or beneficiaries match the donor's demographic or lived experience
- Using occasion-based prompts (e.g. birthdays, anniversaries, end-of-year) to recommend personalized giving opportunities
- Notifying donors when organizations they've supported reach milestones or face urgent funding gaps

Both could be paired with:

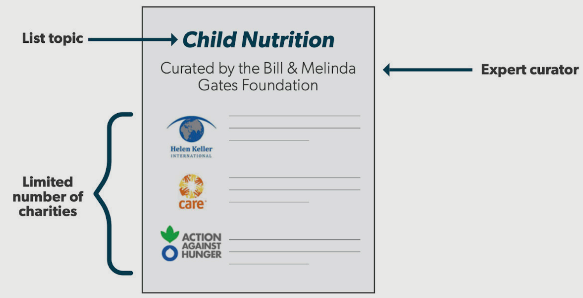
Feedback & reflection strategies *(especially personalization)* • Framing & choice architecture strategies • Subscriptions/recurring giving/memberships • Discovery strategies

CASE STUDIES

Here's how ideas42 has used these strategies

Over the years, ideas42 has designed tools that leverage curation & personalization easier for donors to cut through the noise and find causes and organizations that align with their values:

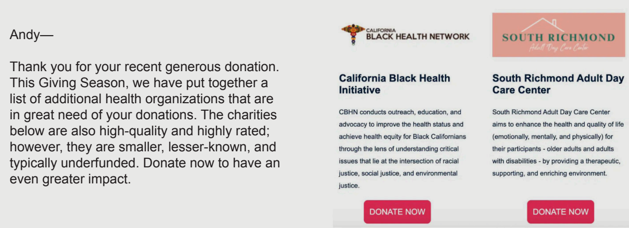
1 ***GiveLists:*** Provides guidance to donors by presenting expertly curated sets of charities within a specific cause area or theme.



2 ***Charity of the Month:*** Matching donors with charities based on the results of a personality quiz

3 ***EquityBoost:*** Alerting donors who have already given to large charities about smaller, under-resourced, related organizations can unlock new gifts toward these recommended charities.

We're looking for partners to scale this concept. Let us know if you would be interested in trying this in your context.



4 ***123Give:*** Donors who already have given to a charity in the past are often open to not only setting up a recurring donation, but pairing that with a recommended additional charity

Your Gift Options

Feature	One-Time	Quarterly	Quarterly+
SUPPORT THE MISSION	✓	✓	✓
CONSISTENT SUPPORT	✗	✓	✓
HIGH IMPACT	✗	✓	✓
NO ONGOING SOLICITATION	✗	✓	✓
VARIETY*	✗	✗	✓
CANCEL ANYTIME	N/A	✓	✓

* Experts will choose a similar, additional charity for you

Here's why these strategies work:

What are the main psychologies at play?

Choice overload

Choice overload occurs when many options are available and there is no obvious best choice among them, in part because they are hard to compare. This can cause people to make suboptimal decisions or forgo making a decision entirely. Paradoxically, while more choices might seem better, people actually respond better when choices are narrowed and matched to their goals or identity.

Authority bias

People tend to trust and follow the recommendations of perceived experts or credible sources. When a curated list is backed by a trusted organization, known individual, or reputable platform, it feels safer and more convincing. This is especially powerful in complex or unfamiliar domains—like philanthropy—where donors may lack confidence in their own judgment.

Defaults

People are more likely to go with the default or pre-selected option. Curated or personalized "top picks" often act as a de facto default, nudging users toward action.

Identity and Self-image

Personalization taps into the desire to act in ways consistent with our self-image ("I support climate justice" or "I'm someone who gives locally"), increasing motivation and follow-through.

Satisficing vs. Maximizing

Most people are satisficers—they want a "good enough" option, not necessarily the best. Curation helps them get there faster, avoiding analysis paralysis.

Mini Literature Review

1. Across three experimental studies, researchers find that people are more likely to make a decision when presented with a more constrained set of choices, around six options, than with 24-30 options. Additionally, the authors note that when people selected from a smaller set of options, they were actually more satisfied with their decision. Iyengar, S. & Lepper, M. (2000). When choice is demotivating: Can one desire too much of a good thing? *Journal of Personality and Social Psychology*, 79(6), 995–1006.

2. Choice-process satisfaction is how people feel about the process of making a choice, rather than just how they feel about the final decision. Research suggests that when options are presented with alignable features (differences that are easy to compare, like size or price), people find the process more satisfying. Alignable differences are easier to evaluate and feel more informative than non-alignable differences, which are easier to evaluate. This pattern was supported by four experiments. Shi Zhang, Gavan J. Fitzsimons (1999). Choice-Process Satisfaction: The Influence of Attribute Alignability and Option Limitation. *Organizational Behavior and Human Decision Processes*, Volume 77, Issue 3, Pages 192-214

3. Recent studies have shown that curation and personalization strategies can have negative effects, decreasing generosity, by making donors feel that their agency is constrained. These researchers sought to increase donors' sense of agency by curating suggested projects and donation amounts and then tying clear, precise impacts to each possible donation. They found that donors feel their agency decreased less, and are more generous, when specific impacts can be tied to curated options. Esterzon, E., Lemmens, A., & Van den Bergh, B. (2022). Enhancing Donor Agency to Improve Charitable Giving: Strategies and Heterogeneity. *Journal of Marketing*, 87(4), 636-655.

4. In a field experiment, the authors find that people initially donate less money as the list of causes to choose from increases, but then they become more generous again as the list of options grows further. These results suggest that the phenomenon of choice overload may occur most acutely when there are a moderately large number of options to choose from. Herzenstein, M., Utpal, D., & Sonenshein, S. How the number of options affects prosocial choice. *International Journal of Research in Marketing*, 37(2), 356-370.

5. When asked to donate to specific individuals in need, people become less generous as the list gets larger. This appears to be driven in part by a desire for fairness—without a means of choosing among a set of options non-arbitrarily, people choose not to give at all. Ein-Gar, D., Levontin, L., & Kogut, T. (2021). The Adverse Effect of Choice in Donation Decisions. *Journal of Consumer Psychology*, 31, 570-586.

Framing & Choice Architecture

Unlike purchasing an item in a store—where you can walk out with what you just bought—giving to a charity usually means donating to support something that hasn't happened yet; you give to enable a future outcome.

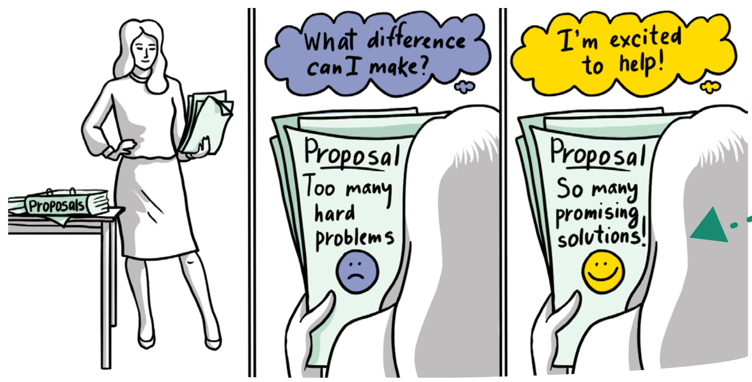
The nonprofit sector, and especially the social change work that many charities do, can sometimes seem opaque to anyone who isn't expertly versed in the field. What outcomes—and therefore what organizations—a donor wants to support will depend on their personal values and preferences. Where they choose to give may be influenced by how they become aware of and learn about different organizations.

Curation, which we covered in the previous guide, can help solve the problem of choice overload by reducing a choice set of potential organizations to a manageable number—but it can't always choose one organization for you. How information is presented *within* a curated set is just as important. For example, describing what exactly a gift will fund (whether it's goods and services or advocacy, short-term or long-term outcomes, or communities that are local or farther away), or visually highlighting certain attributes of a set of organizations (such as size, cause area, or geography), so that a donor can more easily choose the right one. This can help reduce ambiguity and provide donors with helpful cues.

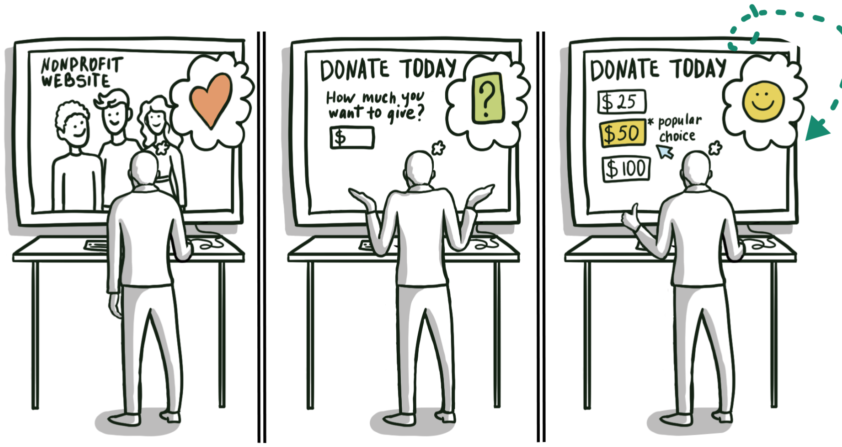
How information and choices are presented— whether it's the physical layout of a webpage, or the language in a description—***can help donors make better giving decisions that align with their goals*** (as we know, many people don't give as much or as intentionally as they'd like). For example, how information about an organization's work is framed can elevate organizations with certain qualities, such as those that are particularly effective at advancing social change or those led by or serving a particular community. How donation options are presented—donation amount, frequency—can help donors be more generous.

What do we mean by framing & choice architecture?

The framing effect is when our decisions are *influenced by the way information is presented.* Equivalent information can be made more or less attractive depending on what features are highlighted or what language is used. Decisions based on the framing effect are made by focusing on the way the information is *presented* instead of the information itself, or what it fundamentally means. In the context of behavioral designs in giving, framing strategies generally leverage *the power of language to persuade* donors to give to certain issues, organizations, or projects.



Choice architecture is similar, but slightly different: when our decisions are influenced by the way our *choices* are presented. Different choices (which, unlike in framing, are often not equivalent to each other) can be made to seem more or less appealing based on how they are presented, rather than based on the implications of choosing that choice. In the context of behavioral designs in giving, choice architecture strategies can be applied in numerous contexts—essentially anywhere a donor is faced with making a choice—but you might be most likely to notice it on either a discovery page, where donors are being suggested different organizations or issues, or on a donation or checkout page, where specific gift or tip amounts, or donation frequencies, are suggested.



Here's how you might apply these strategies

Framing and choice architecture strategies are well-suited for when:

- ✔ You've already initially captured a donor's attention and provided some initial curation, and are now trying to support the donor's discovery and decision-making.
- ✔ You want to reduce ambiguity within a choice set, such as highlighting specific aspects of an issue area or organization.
- ✔ You want to steer donors in a certain direction or encourage donors to take a specific action.

Who can use framing & choice architecture strategies?

Anyone who is interacting with donors in their giving journey can help shape donor behaviors through framing and choice architecture, whether you are...

- Supporting donor discovery and decision-making, such as **advisors**
- Designing and managing the channels through which donors choose and give to organizations, such as **giving platforms or DAF managers**
- Soliciting a donor directly, such as **nonprofits**

How can framing & choice architecture help you engage donors?

DESIGNS

FRAMING ***designs*** can help donors:

- Give to new/different organizations or issue areas, or approaches
- Give more unrestricted funding
- Feel more confident in their gift
- Better understand the impact of their gift

CHOICE ARCHITECTURE ***designs*** can help donors:

- Give more frequently
- Make recurring gifts
- Make bigger donations
- Add a tip
- Give to new/different organizations or issue areas

STRATEGIES

These strategies could look like:

- Using asset-framing language instead of deficit-framing language when describing a community being served
- Using different terminology (potentially in different contexts/with different audiences) to describe similar work/organizations (e.g. gender justice vs. women & girls; or systems change vs. root cause; or equity vs. social justice)
- Talking about ambiguous, longer-term goals (such as policy change) in terms of short- to medium-term activities (such as direct advocacy with policy makers)

These strategies could look like:

- Using tags, badges, or other graphic features to draw attention to/highlight specific attributes/characteristics of a choice
- Setting default gift or tip amounts, or default donation frequency amounts
- Highlighting the "most popular" option that other users have chosen
- Interactive features/pop-ups that appear (or disappear) when certain choices are selected (or unselected)
- Balancing how choices are laid out on a webpage (e.g. information density & hierarchy); what aspects of the information can be engaged with
- Reducing the number of steps it takes to complete a task (e.g. streamlined check-out flow)

Both could be paired with:

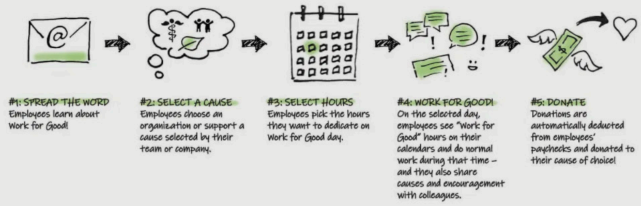
Curation strategies/products • Subscriptions/recurring giving/memberships • Goal setting strategies

CASE STUDIES

Here's how ideas42 has used these strategies

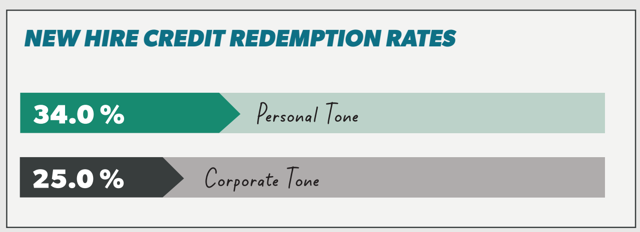
Over the years, ideas42 has designed tools that leverage framing and choice architecture to help donors make giving decisions that align with their goals and values:

1 ***Work for Good:*** A program that reframes donation dollars as equivalent time appears to encourage engagement, support more social visibility, and contribute to a richer narrative about giving

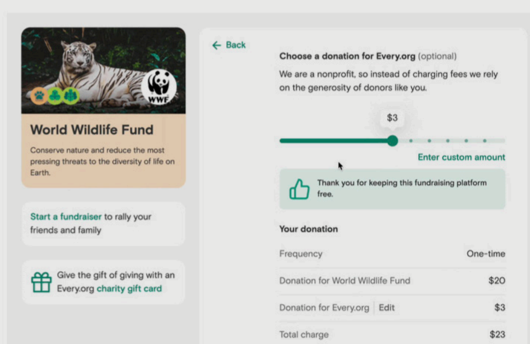


2 ***GiveLists:*** Asking *how much* someone wants to donate before asking them *who* they want to donate to increases average donation amounts.

3 ***Yahoo:*** Higher redemption rates with personal tone and loss framing



4 ***Every.org:*** A novel way to use choice architecture to increase tipping to giving platforms by removing a message of gratitude when a tip is omitted.



Here's why these strategies work:

What are the main psychologies at play?

Framing effect

The framing effect is when our decisions are influenced by the way information is presented. Equivalent information can be more or less attractive depending on what features are highlighted.

Priming effect

When prior exposure to a certain stimulus, or information, influences a person's reaction to a later prompt or decision without their knowledge. This effect can be quantitative—e.g. where priming someone with a number can influence a subsequent evaluation of a quantitative task, such as guessing the value of an item, or qualitative—e.g. identity priming, where priming someone with information about themselves can influence them to behave in alignment with that identity.

Mere exposure effect / familiarity bias

Our tendency to prefer what we are familiar with as a result of having been exposed to it repeatedly. Like with defaults, this can lead us to choose options that may not be optimal, just because they are more familiar.

Status quo bias

Our tendency to prefer the current state of affairs, or how things are now. This often makes us more resistant to change, even if the result of the change would be objectively better for us.

Social norms

Collectively held beliefs on what kind of behavior is appropriate or acceptable. *Descriptive norms* reflect what people actually do, and are often implicit and unspoken. For example, social permissiveness around jaywalking varies from city to city. *Injunctive norms* reflect what people ought to do, and are often more explicitly articulated.

Social proof

When a person is in a situation where they are unsure of the correct way to behave, they will often look to others for clues concerning the correct behavior. In situations where it can be anticipated that someone may not know how to behave, sharing examples of how other people have behaved in a similar situation can provide guidance.

Loss aversion

A cognitive bias that describes why, for individuals, the pain of losing is psychologically twice as powerful as the pleasure of gaining an equivalent amount. In other words, losses loom larger than gains.

Regret aversion

A cognitive bias where we tend to choose the option that would result in the least regret even if it's not the most optimal choice for us. Related to loss aversion.

Mini Literature Review

1. A brief Literature Review of Framing Research. ideas42 (2024)
2. This article describes decision problems in which people systematically violate the requirements of consistency and coherence, and we trace these violations to the psychological principles that govern the perception of decision problems and the evaluation of options. Tversky, A., & Kahneman, D. (1981). The framing of decisions and the psychology of choice. *Science, 211* (4481), 453-458.
3. Decision problems can be described or framed in multiple ways that give rise to different preferences, contrary to the invariance criterion of rational choice. Kahneman, D., & Tversky, A. (1984). Choices, values, and frames. *American Psychologist*, *34*(4), 341-350.
4. A study in Management Science found that requesting donations in the form of "units" of service instead of just dollars increased donation amounts by 57%. In an online test, large donation units (1 unit = $30, or one month of nutritional support for a child) far outperformed small donation units (1 unit = $1, one day of nutritional support) or simple dollar donation requests. The average donation amount for donors who received the large unit framing was $42.35, whereas it was $26.94 for dollar donations, and $24.25 for small unit framing. Raphael Epperson, Johannes Diederich, Timo Goeschl (2024) How to Design the Ask? Funding Units vs. Giving Money. *Management Science* *0*(0).

Reflection & Feedback

Think back over this past year. Did you donate to a friend's cause? Did you volunteer your time? Did you support new organizations, or organizations you have given to in the past? Looking back on it now, does your giving reflect who you are and what you care about?

Think about your charitable giving over the past year or so. This might be hard to answer, in part because you may not even know where and how much you donated. Without a place to collect information about donor giving, and a time to review it, it can be difficult for donors to learn from and improve their own giving behavior.

Left to their own devices, people often donate impulsively. They might receive an email asking for support on a cause right after they watched an affecting movie; perhaps they see an organization doing good work in their neighborhood; or a friend asks for support for their nonprofit they volunteer with. Some donations may be planned, to organizations donors have a long-standing relationship with. But many are spontaneous, to one-off organizations or causes.

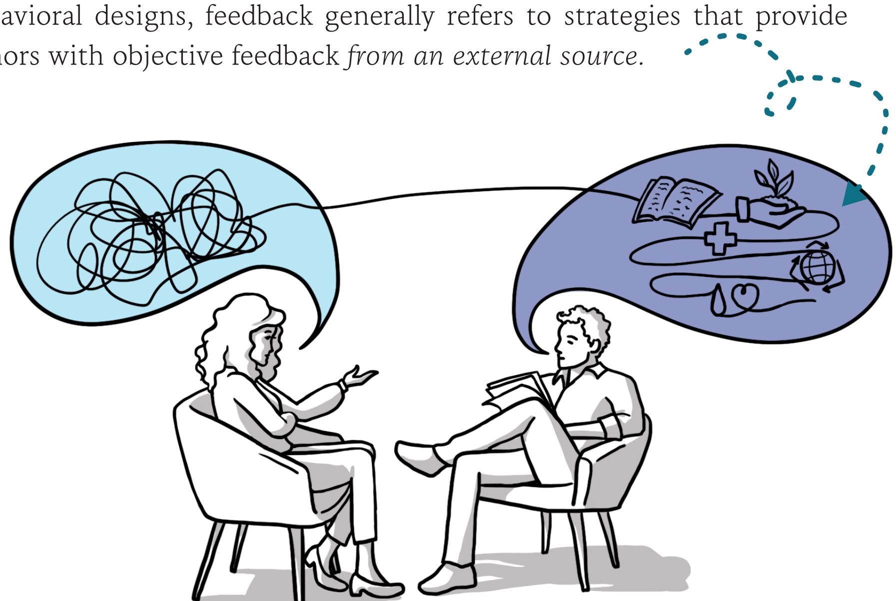
There are also rarely opportunities for donors to stop and reflect on their values and identify organizations and causes that align with their priorities. Nor do social norms encourage this. Moreover, donors often give through various channels—on nonprofit websites via credit card, at the grocery check out, on a giving platform, or even with a paper check—so records may be scattered and nearly impossible to aggregate. Lacking insight into the 'big picture' of their giving makes it challenging for donors to plan or adjust. In fact, many people don't give as much or as intentionally as they'd like.

Leveraging reflection and feedback strategies for donors to engage with their own giving preferences and behavior can help mitigate some of these challenges.

What do we mean by Reflection & Feedback?

Reflection is serious or intentional thought or consideration. Self-reflection might prompt an examination of one's values, preferences, experiences, or behavior. This exercise could be prompted by a virtual experience, like an onboarding process or a quiz, or an in person experience, like a conversation with a friend or advisor. In the context of behavioral designs, reflection generally refers to strategies that provide donors with an opportunity to *self-reflect and give themselves feedback.*

Feedback is the sharing of information about actions or behaviors back to the person who undertook those actions. Generally this information—which can range from simple data to more subjective evaluation—is shared with the intent of shaping the person's future actions. This could be surfacing or providing information and trends about a donor's past giving behavior, such as frequency, amount, or recipients of giving. In the content of behavioral designs, feedback generally refers to strategies that provide donors with objective feedback *from an external source.*



Here's how you might apply these strategies

Reflection & feedback strategies are well-suited for when:

- ✔ You've already initially captured a donor's attention and are trying to maintain it to foster ongoing engagement and improve giving practice.
- ✔ Self-reflection can happen at any point in the donor journey, but is likely most effectively either immediately before a giving choice or decision is made—to inform that choice—or after a giving decision has been made—to reflect on that choice.
- ✔ Feedback is best suited for after giving decisions have been made—ideally after a number of giving actions have been taken—so that a period of giving behavior can be looked back on and evaluated as a whole.

Who can use reflection & feedback strategies?

Anyone who is interacting with donors in their giving journey can help shape donor behaviors through reflection & feedback strategies, whether you are...

Engaging with donors through direct conversations, such as **advisors**

Designing and managing the channels through which donors give, such as **giving platforms or DAF managers**

Engaging with the donor directly, such as **nonprofits**

How can reflection & feedback help you engage donors?

DESIGNS

REFLECTION ***designs*** can help donors:

- Better understand their own giving preferences and priorities
- Find their optimal giving approach
- Give to new or different organizations
- Be more generous
- Give more frequently

FEEDBACK ***designs*** can help donors:

- Better align their giving behavior with their giving intentions
- Understand the impact of their giving
- Give to new or different organizations
- Be more generous
- Give more frequently

STRATEGIES

These strategies could look like:

- A quiz that prompts donors to reflect on their own preferences, priorities, and giving styles
- The onboarding process for setting up a profile on a giving platform, to inform future recommendations or goal setting
- An intake conversation with a philanthropic advisor to understand a donor's context and goals
- An opportunity to bring family members together to reflect on shared priorities.

These strategies could look like:

- A year-in-review recap of a donor's past giving, whether in an email, dashboard, or conversation with an advisor.
- A year-in-review could provide feedback on gift size, gift frequency, giving approach, grantee type, etc., and could provide comparative data about a donor's peers, to provide context.
- A reminder of past goals and determine whether past giving met those goals.
- Personalized recommendations for future giving based on past giving.
- Leveraging peer effects and social comparison to influence donor behavior.

Both could be paired with:

Curation strategies/products that can help "fill the gap" in a donor's giving • Subscriptions/recurring giving/memberships • Goal setting and plan making strategies

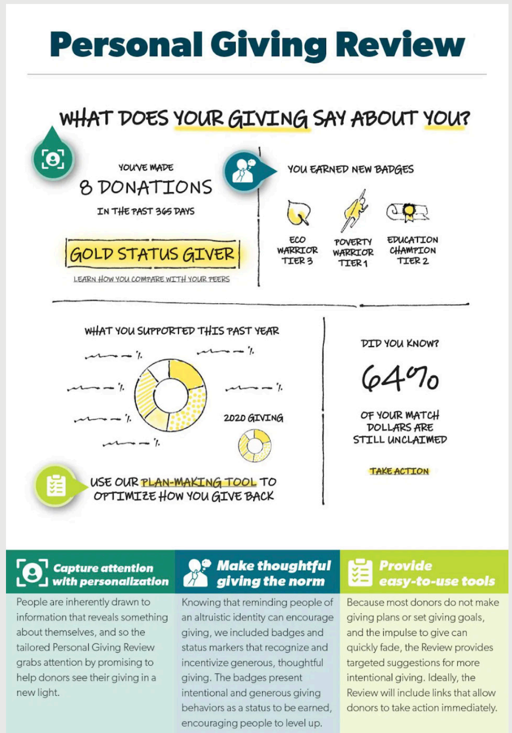
CASE STUDIES

Here's how ideas42 has used these strategies

Over the years, ideas42 has designed tools that leverage reflection & feedback to help donors make giving decisions that align with their goals and values.

1

Personal Giving Review:
A year-in-review email that summarized a donor's past giving with insights and feedback, and provided an opportunity to convert giving intent into a giving plan.

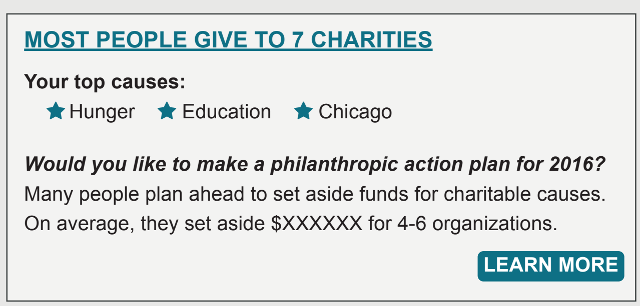


2

1% for the Planet Reflection Quiz:
A quiz that used personalized reflection to match users with their environmental giving archetype (Builder, Strategist, or Explorer) to bridge the intention-action gap and encourage more intentional giving.

3

Bright funds goal setting tool:
A goal-setting tool that encouraged donors to set new goals for the following year after reflecting on their past giving.



Here's why these strategies work:

What are the main psychologies at play?

Intention-Action Gap

When someone's values, attitudes, or intentions don't match their actions. For instance, saying they want to go to the gym in the morning but sleeping in instead.

Cognitive Dissonance

Cognitive dissonance refers to our tendency to prefer consistency in our beliefs and behavior, and, should inconsistency arise, we seek ways to get rid of the inconsistency, by adapting either our beliefs or our behavior.

Social norms

Collectively held beliefs on what kind of behavior is appropriate or acceptable. *Descriptive norms* reflect what people actually do, and are often implicit and unspoken. For example, social permissiveness around jaywalking varies from city to city. *Injunctive norms* reflect what people ought to do, and are often more explicitly articulated.

Self-Perception Theory

When people become aware of certain attitudes by observing their own behavior. Our tendency to understand our attitudes through observing our own behavior. Uncertainty often causes us to make inferences about our feelings based on how we respond in a given situation.

Peer effects

When observing or being made aware of others' performance or behavior, individuals modify their own behavior to align with that of their peers. Similar to **Social Facilitation Theory**, which refers to the finding that people sometimes show an increased level of effort as a result of the real, imagined, or implied presence of others.

Social proof

When a person is in a situation where they are unsure of the correct way to behave, they will often look to others for clues concerning the correct behavior. In situations where it can be anticipated that someone may not know how to behave, sharing examples of how other people have behaved in a similar situation can provide guidance.

Mini Literature Review

1. Effective feedback is: 1) given frequently and over long periods of time, 2) provides actionable details, and 3) leverages digital, interactive elements. Fischer, C. (2008). Feedback on household electricity consumption: a tool for saving energy?. *Energy Efficiency, 1*(1), 79-104.
2. Looking into feedback techniques to increase recycling and proper disposal of food waste, the authors find that feedback on habitual behavior—especially if existing behavioral patterns don't conform to one's self-image of their behavior—prompts self-reflection and re-evaluation of oneself in light of the gap between one's own beliefs and actions. This can cause a person to change their behavior. *Personal and Ubiquitous Computing, 17*(6), 1197–1210.
3. Reaffirming donors' identities as charitable, generous people increases donations. Canvassers visited households and asked for contributions. Some donors were told, "You are a generous person. I wish more of the people I met were as charitable as you," while other donors were given no feedback. In a later fundraiser for a related cause, those who had been called out as charitable gave on average 71% more than those who had not been labeled. Kraut, R. E. (1973). Effects of social labeling on giving to charity. *Journal of experimental social psychology, 9*(6), 551-562.
4. Mentioning another donor's contribution level can increase donation amounts. In a field experiment at a public radio station, some donors were given information about how much others had contributed. Researchers found that sharing this information, compared to simply asking for a pledge amount, increased average donation amounts by 12%. *The Economic Journal, 119*(540), 1422-1439.
5. Employing both a large correlational field study (n = 975) and a smaller experimental study (n = 142), researchers find that people rely heavily on social information when giving and often make donations in line with what they believe to be the average donation made by other people. Croson, R., Handy, F., & Shang, J. (2009). Keeping up with the Joneses: The relationship of perceived descriptive social norms, social information, and charitable giving. *Nonprofit Management and Leadership, 19*(4), 467-489.
6. Communicating norms increases participation. Clients at a legal services organization (n = 3,000) were asked one of two questions during the preparation of their wills: 1) "Would you like to leave any money to charity in your will?" or 2) "Many of our customers like to leave money to charity in their will. Are there any causes you are passionate about?" Clients in the second group were 43% more likely to participate in legacy giving and gave more than double (114% more) than those who received the plain ask. UK Behavioural Insights Team. (2013). *Applying behavioural insights to charitable giving*.

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 and follow @ideas42 on X [formerly Twitter] to learn more about our work. For more information about this guide, contact TK at TK.

Acknowledgments

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