Enhancing effective charitable giving: a research, collaboration, and information sharing project

* *Summary for Gates foundation, draft composed by David Reinstein; survey paper is with Nick Fitz and Ari Kagan*

**Purpose and proposed outputs:** Our research, communication, and impact program aims to provide practical methods to increase the level and impact of *informed and intentional generosity*. We are building a database of evidence on *what works*, with a particular focus on impact-driven donation behavior. We will assess, evaluate, and present this in several ways, including an interactive database, a collaborative wiki, and a meta-analysis survey paper. Each of these will be carefully linked and integrated. For example, the analysis and discussion in the survey paper will be mirrored in the structure of the wiki, providing a platform for discussion and updating. Each element of the surveyed evidence will be provided as a database entry, cross-referencing relevant papers, theories, use-cases, and available raw data. This *living resource* will be able to quickly compile and disseminate the best available evidence to users. The meta-analysis will be presented in the database and wiki, as well as in a web app (e.g., R Shiny Rstudio). This will permit users to consider alternate assumptions and methodological criteria, and to focus on particular domains as relevant to their own practice. We aim to engage a diverse user-base, including fundraisers, charities, academics, and donors/philanthropists. Thus we will offer multiple formats (while avoiding confusing overlap), allowing users to choose their preferred level of technicality and detail.

*Partial and preliminary work can be found on the* [Innovations in Fundraising wiki](http://innovationsinfundraising.org/doku.php?id=iifwiki:evidence_tools); further work is compiled in a database format (Airtable).

## Key questions

* + 1. *Targeting and basic approach*
* Who gives to effective charities, and can we predict who is likely to be convinced to do so? How can we best target and persuade the general population as well as high-ńet-worth individuals?
* Is it productive to ask people to *shift* their giving towards more impactful charities? If so, when and how is this effective? Underlying this: are charities in competition and do people “rob Peter to pay Paul?”

*Psychology*

* Individual barriers to moving toward more effective giving may include cognitive dissonance avoidance, cost-benefit aversion, and opportunity-cost neglect; as well as common factual misconceptions about international charities. Will de-biasing and correcting misconceptions lead to more effective giving?
* How can we present effectiveness information in a way that *works*, without dampening emotional motivations to give? Can we avoid self-interested “motivated reasoning” responses to this?
* How can we reduce the *empathic distance* to international recipients and make those geographically-distant feel local?
* How can we best apply standard emotional and behavioral approaches (evidence-based fundraising tools like "gift exchange") to *effective* charities. In applying these tools, what superpowers and weaknesses do the most effective charities have?
* How can we incorporate psychological and social *rewards for donors* without overly sacrificing efficiency? What is the tradeoff between promoting the purest, best-evidenced charities (e.g., GiveWell's list) and increasing the overall donation amounts?

*Policy*

* - Will the tools that boost effective giving also increase support for foreign aid and pro-poor policies?
* - What is the interaction between private giving, the level of public funding for effective causes, and support for government policies, and how can we boost the *net* public and private impact?

## A program for future work and evaluating previous work

* Build platforms to observe relevant giving behavior and run experiments to understand the impact of approaches across several contexts.
* Open Science Framework: Maintain research integrity, collaboration and data-sharing, enabling re-analysis and meta-analysis.
* Robust and validated evidence: This includes pre-registration and pre-analysis plans, experimentation and independent replication across a range of relevant environment and frames.
* Present research for *users* in an effective way, using modern information systems. Avoid “old-school” academic journal presentation formats and “frozen PDFs” in favor of living, continually-validated and re-assessed content. Open access in a web framework.
* Collaboration with and among relevant charities/fundraisers (e.g., International Fundraising Leadership Forum)
* Use wiki and other collaboration tools to organize open communication and sharing
  + of research results and insights, data, and methods,
  + of informal (non-academic, non-systematic) trials and experiences, and
* of critical insider knowledge and intuition.

# User stories: Who will use this and how?

1. Effective charities, their fundraisers, and groups of these organizations (e.g., the [IFCL](http://www.fundraisers.fr/sites/default/files/4/IFL-Forum-presentation-at-IFC-2014_0.pdf)) will use this directly to increase their support-base, their appeal, and their income. Evidence will be presented in interactive and accessible ways, including more and less technical presentations, allowing users to select a tailored analysis. We will provide personal support to qualified effective charities.
2. Government policymakers: in enabling and enhancing effective private giving, and providing public programs that are compatible with this.
3. Foundations: in targeting and communicating interventions, considering interactions and feedback on the wider society of givers
4. Advocates and activists for globally sympathetic and pro-poor policies; as research is likely to unlock both factors that encourage effective giving and factors that drive cross-cultural sympathy, empathy, and action
5. Academic, professional, and applied researchers interested in this area (both "effective charitable giving" directly, and as an input into understanding human behavior). *Our project will encourage and foster future work by...*
   * providing an accessible “evidence baseline”: a shared database of raw and meta-data,
   * providing collaborative tools and platforms to facilitate further analysis (e.g., working with e-commerce and social fundraising sites to establish a continuous opportunity to test charitable messaging in a stable context),
   * building an interactive, global community of researchers and practitioners, and
   * providing a pathway to disseminate results to users and measure a clear practical impact, and
   * building tools and a framework to enable to a clear and efficient process for evaluating and funding to evaluate and disperse grants to fund promising research, following the principles of open science.

# The existing team and resources

**Principal investigator:** Dr. David Reinstein, Dept. of Economics, University of Exeter

**Co-authors**

Dr. Nick Fitz (Psychology), Center for Advanced Hindsight, Duke University

Ari Kagan, Center for Advanced Hindsight, Duke University

**Support and guidance (past, current, and promised) from:**

* Dr. Paul Smeets (Sustainable Finance, University of Maastricht)
* Dr. Lucius Caviola, Dept. of Psychology, University of Oxford
* Dr. Robin Bergh, Sidanius lab, Harvard
* Dr. Mark Kelson, Statistics and Data Science, University of Exeter
* Dr. Ekaterina (Katja) Abramova (Cognitive Science, web developer)
* Omar Parbhoo, Ideas42 and BHub
* The Charity Science Foundation
* Giving for Impact (Contact: Vera Scholermich)
* The Life You Can Save/Giving Games (Contact: Jon Behar)
* The Centre for Effective Altruism (Oxford; Contact: George Howlett)

Seeking support from: BITSS for meta-analysis projects, and from X-Econ.org for data sharing

Other potential funding sources: [Open Philanthropy](https://www.openphilanthropy.org/giving/guide-for-grant-seekers), Leverhulme Academy

## Discussion: combining and weighing information from different domains, with different approaches, etc.

*Discussion moved to IIF page* [*HERE*](http://innovationsinfundraising.org/doku.php?id=tools:meta-analysis_approach)