

Vision In Philanthropy - Sharing our learning

Introduction

This paper provides a synthesis of learning to date from the Building Change Trust 'Vision in Philanthropy' Exploring Change project. It draws on the respective experiences of project partners, commissioned research, and collective discussion.

Understanding of Philanthropy

The Vision in Philanthropy group understands philanthropy as being planned charitable giving with defined strategic purpose. It is a form of charitable giving characterised by being:

- self-initiated,
- sustained,
- with intent and engagement

Philanthropy is therefore a sub-set of the universe of general Charitable Giving, which embraces everything from spontaneous response to appeals, through to volunteering time as shown in the diagram below.

This simple presentation below helps us understand the universe within which philanthropy can be placed and therefore the distinctions and interdependence between philanthropy and general charitable giving. For example from the demand side – the difference between fund raising and fund development; or from the supply side the potential pathway from low level ad hoc giving to regularising / up-scaling and engagement.



The Philanthropy Market in Northern Ireland

Traditionally Northern Ireland is a generous society with over eight in ten people being involved in some form of charitable giving. However philanthropy is less well developed. In particular there is a lack of connectedness in market mechanisms in order to address barriers to giving that impact on motivation; ability; and opportunity.

The philanthropy advice market is a critical catalyst in the development of the philanthropy market. In Northern Ireland philanthropy advice is weak and diffuse, and there is a resistance from professional advisers to raise the question of philanthropy with their clients. In Britain many private bankers, estate planners and wealth advisers view philanthropy advice as a critical element of their client service – and see that it makes good business sense to build their capacity in this area.

The variety of mechanisms and local / international structures for giving in a strategic and planned way is not widely known – e.g. donor advised funds, CAF charitable accounts etc.

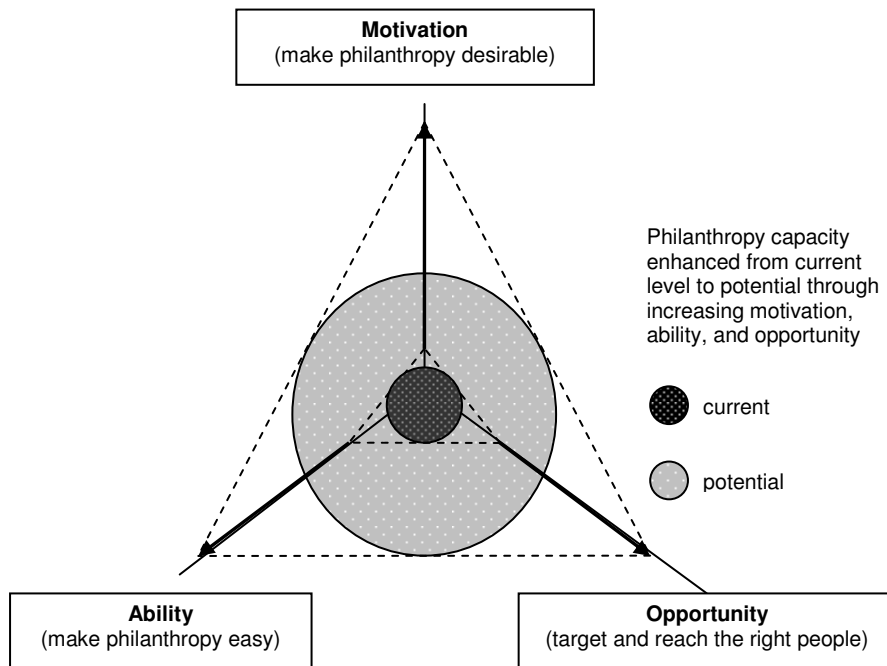
There are few philanthropy market leaders / ‘champions’ who demonstrate through practice and are recognised by others. Moreover it is not a subject that is talked about – even confidentially.

Market drivers include:

- Individual drivers – personal values, family / peers / role models, impact of social investment
- Corporate drivers – corporate values / culture, schemes for payroll (and other) giving, financial / other incentives, integrating CSR with corporate and private philanthropy
- Institutional drivers – access to advice and mechanisms for giving

The Challenges in Promoting Philanthropy

There is a need to develop a co-ordinated strategy to promote philanthropy and to develop the philanthropy market. The promotion of philanthropy is essentially a marketing challenge – it is about cultural change which leads to behavioural change and requires addressing barriers to giving that impact on motivation; ability; and opportunity.



Leadership is critical to the success of any philanthropy promotion initiative – both in respect of co-ordination and collaboration but also in the form of figure heads or ‘champions’. The corporate sector is a potential key driver of philanthropy, both through helping create a culture of giving (perhaps incentivised through corporate matching) and through the actions of business leaders.

Peer support networks at various levels will help engage more people e.g from professional adviser networks, through to donor circles.

Mechanisms for philanthropic giving need to be widely understood and easily accessed. Professional advisers have a critical role to play in the philanthropy market in building philanthropy advice into their client ‘offer’ and developing their own knowledge of mechanisms for giving.