pilotlight

Philanthropic Journeys:
new insights into the triggers and barriers for long-term giving and volunteering

Beth Breeze

"What I've discovered is the passion and commitment of everybody in all of these charities I've worked with. It is incredible and a real lesson to me as a banker."

"I always had this idea that you had to be careful with charities because a lot of it is wasted money."

"I've become a lot more strategic about my giving, for the first time ever I worked out a giving plan."

"I didn't want to make cakes, so at that point I thought the only thing I can give is my skills."

"I ran marathons for charities and there were lots of fundraising events but I wanted a much more efficient use of my time. Now I contribute my thinking and use my professional skills, and it makes a lot more sense."

"It's given me some skills I didn't have before, it's building my leadership skills."

"It is difficult to give your money and get involved with charities wisely."

"My giving was very sporadic…I'd done some volunteering but never as an ongoing commitment, it was very limited."

"I think the biggest reward has been feeling like you can make a difference in a very different world than the one you work in."

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Beth Breeze June 2014

Acknowledgements

About the Author

Beth Breeze is director of the Centre for Philanthropy at the University of Kent. She conducts research on a range of topics including major donors, charitable giving decisions, the profession of fundraising and giving circles. She also teaches courses on philanthropy, fundraising and volunteering.

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Foreword
by Graham Clempson, Chairman, Pilotlight and Trustee, Highwood Foundation

The promotion of charitable giving and philanthropy is critical if we are to live in a better society. This is a core goal of the Government, who through the Social Action Fund have supported this report, and organisations like Pilotlight, whose work with small charities has such a disproportionate impact on both the organisations it supports and the business volunteers it works with.

I believe that giving, whether it is of money or time, is a life-long habit that brings benefits to those who give as well as to the causes that they choose to support. It is a habit that everyone can develop if they have the right support and opportunities. This is why at Pilotlight we work with volunteers from the business community to ensure that they give their time and skills efficiently and effectively. This approach creates a sustainable impact on the charities they work with and gives them the confidence to use their skills in a philanthropic environment.

This normalisation of philanthropy is key – we need to move to a position where private giving is a natural and expected part of a life well lived. It is why, through my own foundation, I chose to support Pilotlight and this report. I have experienced first-hand just how the investment of time and effort in nurturing people's innate generosity helps them to embark upon a personal philanthropic journey, bringing long-term benefits to our society, as well as to themselves.

As the report concludes, the role of philanthropy in modern society is far too important to be left to chance. We need to identify and tackle the barriers that prevent people from giving. We need to help people reach their full philanthropic potential and create a generation of donors who can start to give more strategically, and volunteer on a sustained basis.

Our aspiration is that this report is widely read and discussed both within and beyond the charity sector, and most importantly that it will help to ensure that greater numbers of people have the opportunity to become life-long, committed supporters of voluntary action.

Executive Summary

The UK is a generous country: the giving of time and money to help good causes is a normal part of everyday life. But much of that giving is superficial, involving spare change rather than strategic major donations and sporadic 'helping out' rather than sustained volunteering. Our charity sector is therefore reliant on the collective impact of intermittent gifts, rather than the sustained commitment of life-long givers.

This report explores how people's philanthropic journeys – defined as their lifetime voluntary contribution of time, treasure and talent – can be extended and deepened to the benefit of both recipients and the donors. We take this approach because most research takes a 'snapshot' of giving at a moment in time, rather than trying to understand philanthropy as a dynamic, life-long activity. Our concern is with how people start and scale up their giving – or indeed how they start and then stop, or never get started in the first place.

The research comprised an online survey of 227 senior business people and in-depth interviews with ten people. All respondents had participated in (or are ongoing participants in) structured, supported, time-limited volunteering placements organised by the charity, Pilotlight. In some ways the sample is typical of the general population, for example with regard to donor motivation and barriers to giving. In other respects our sample is less representative of the general population, for example being disproportionately higher income earners. However, the greater capacity of richer people to give money makes them the focus of most efforts to increase philanthropy, so the sample is appropriate for the study at hand.

Key findings:

- The concept of the philanthropic journey refers to the full flowering of an individual's philanthropic potential over their whole life-time.

- Supported interventions, in the form of structured, time-limited and appropriate volunteer placements, can – and do – have the capacity to help senior business people overcome barriers, especially those related to lack of time, so that they can begin and accelerate their philanthropic journeys.

- The right initial experience of engaging with charities can generate significant future benefits – including a doubling of intention to volunteer, a 12% rise (from 29% to 41%) in willingness to make significant donations of £1,000 or more and a three-fold increase in desire to serve as a trustee of a charity.

- As a result of learning more about how charities operate, volunteers become more thoughtful and effective donors. In particular this helps to generate an increased understanding of the need to cover so-called 'core costs'. Where previously donors may have seen such costs as unattractive at best – or wasteful at worst – they learn that funding the underlying costs of a good organisation is not only essential to literally keep the lights on, but can also help leverage benefits beyond the value of the donation.

- Four main barriers face senior businesspeople who wish to get involved in supporting good causes:
  1 Lack of confidence that skills and expertise gained in the private sector will be useful to charities, and that such experience will in turn benefit the volunteer in their personal and professional lives.
  2 Lack of time due to commitments at home and at work.
  3 Lack of awareness of appropriate opportunities to get involved.
  4 Concern that charities will be badly managed.

Executive Summary (cont)

These barriers are manifested in six archetypes drawn from the data, as follows:

I   **Nothing to offer** people whose professional success fails to provide reassurance that they have anything useful to offer a charity.

II   **Nothing to gain** people who struggles to see how helping good causes can help their career.

III **Analysis Paralysis** people whose concern to find the 'right' cause to help in the 'right' way has stopped them making any substantive giving decisions.

IV   **Burnt Fingers** people whose previous experience of donating and volunteering has failed to meet their expectations of making a substantive difference.

V   **Too busy at work** people whose long hours at work leave them unable to get more involved with good causes.

VI   **Too busy at home** people whose commitments at home hold them back from making a bigger voluntary contribution.
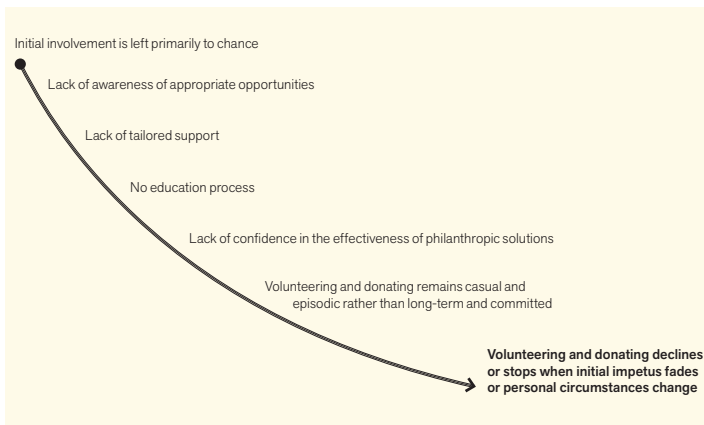
Despite their different outlooks, experiences and personalities, the philanthropic journeys of all six of the types described above share common stages, which we encapsulate in two models. The first model depicts the status quo, where the role of chance and poor experiences affect the number of people who both start and progress their philanthropic journey. The second model shows the ideal situation, where those wishing to give time, treasure and talent become increasingly aware, educated and confident, resulting in an ever-deepening commitment to voluntary action.

An effective approach to initiating and accelerating the philanthropic journeys of senior business people involves providing accessible, structured and supported opportunities. This enables volunteers to apply their professional skills and experience, and give their money in a strategic and informed way, for the benefit of charities and social enterprises seeking strategic input.

The role of philanthropy in modern society has become too important to be left to chance, and the contribution of potential philanthropists matters too much to leave perceived barriers in place. It is therefore time for government, charities, employers and individuals to take a more pro-active, enabling approach so that more people can start and complete the philanthropic journeys that will bring benefits to themselves and to our wider society.

Model 1:
The status quo
How things often are – the unsupported philanthropic journey

Initial involvement is left primarily to chance

Lack of awareness of appropriate opportunities

Lack of tailored support

No education process

Lack of confidence in the effectiveness of philanthropic solutions

Volunteering and donating remains casual and episodic rather than long-term and committed

Volunteering and donating declines or stops when initial impetus fades or personal circumstances change

Model 2:
The ideal world
How things could be – the supported philanthropic journey

Volunteering and donating are sustained and/or increased

Further contribution of time, talent and treasure

Deeper personal commitment to being part of that solution

Increased confidence in the effectiveness of philanthropic solutions

Better education about how charities work and meet needs

Growing awareness of the nature and extent of the needs being met

Initial involvement occurs because barriers are understood, diminished or removed

The report ends with eight recommendations aimed at government, employers, charities and potential philanthropists.

1   Politicians and policymakers need to understand that philanthropy is better conceived as a life-long journey rather than a series of unrelated giving acts. Much existing policy can be characterised as fragmented and focused on stimulating particular types of gifts, such as payroll deductions or charitable legacies. Shifting the focus to growing life-long givers rather than gaining specific gifts, is more likely to achieve the overall goal of growing a stronger culture of philanthropy in the UK.

2   Government needs to extend its support for volunteering initiatives beyond the current focus on young people and retirees, because mid-life professionals also need targeted, high-quality encouragement and support.

3   Employers need to do more to facilitate their employees who want to use and develop their professional skills for the public good – including providing financial support so that staff can undertake structured, supported volunteering opportunities.

4   Employers need to support workplace giving of time and money by having an embedded culture of giving that is led and encouraged by business leaders. Employers should also recognise that they gain in terms of skills coming back to the workplace. When benefits are understood to be mutual, that leads to more sustainable relationships between companies and charities.

5   Charities need to be more aware of what it is that donors of time, talent and treasure have to give. They need to take account of donors' interests, provide a range of opportunities that meet their goals and to use a personal approach – including the use of professional networks – to invite and welcome new donors.

6   Charities need to curtail fatalistic assumptions that good volunteers are hard to find because they lack interest, are scared of the responsibility or put-off by lack of payment, and instead tackle the genuine barriers that exist due to low awareness of opportunities to get involved, and poor perceptions of how they are run.

7   The generous majority of our population need to consider how their giving of time and money can become less superficial and more strategic, which will bring greater benefits to themselves as well as to the causes they are helping. They need to back charities by giving regularly and through tax-efficient methods such as Gift Aid and Payroll Giving.

8   More research needs to be undertaken to better understand the concept of the 'philanthropic journey'. In particular, more research is needed on groups other than senior business people (such as people in other occupations including medicine, law or civil servants) as well as studies that focus on other socio-demographic characteristics (such as working mothers or child-free professionals). Such a body of work could collectively present a viable alternative to the present literature, which primarily conceptualises philanthropy as episodic and disjointed, rather than inter-connected and contextualised within an individual's life-course.

Introduction

Philanthropy – a word meaning 'the love of human kind' – is a fundamental human sentiment and behaviour that is observable in every era of history and in every part of the globe. It is an outlook as much as an action, one that develops over a lifetime as a result of processes such as absorbing cultural norms; being socialised within families, schools and workplaces; observing influential role models; and receiving signals from government, employers and peers. Philanthropic activity is therefore clearly too complex to be encapsulated in any particular moment in time. Rather we need to understand its roots, or what prevents it taking root. And we need to fathom whether and why it flourishes or founders over an individual's lifetime if we wish to design policies and practices that enable everyone to maximise their philanthropic output.

This research therefore looks at the philanthropic journeys of senior business people, to explore how those with significant resources of time, talent and treasure arrive at decisions about how to share these resources for the public benefit. This 'life-course' approach differs from most research in this field, which usually involves taking a 'snapshot' of philanthropy, such that individuals are asked about how much time or money they have given in a relatively brief recent period, such as the preceding month or year. Whilst such studies produce useful data on macro trends in giving and volunteering, they shed little light on how philanthropic behaviour begins, continues or ends, and cannot hope to explain how philanthropy is contextualised within donors' broader life events and longer-term attitudes and actions.

We acknowledge a debt to NCVO's influential 'Pathways through Participation' project[1], which also took a qualitative approach to understanding how people become active citizens. That project's final report noted that the main triggers for participation are often either unpredictable or beyond the influence of policymakers and practitioners seeking to stimulate generosity. For example people were found to engage as a result of,

> "an experience or emotion such as anger at a decision, a threat, or wanting to improve something locally; a life event such as a new relationship, retirement, ill health, moving area or having children; an outside influence such as a natural disaster, hearing about something for the first time, or just being asked" (NCVO 2011, p7).

Our work builds on some of the excellent ideas raised by that project and applies them to a specific group – senior, high earning business people – who have the capacity to contribute significant financial donations in addition to giving their time and talent to good causes.

The present study is modest in nature but ambitious in aim. It focuses on one segment of the population – senior business people – who have engaged in a particular type of structured engagement with charities, facilitated by a host organisation called Pilotlight[2]. We have explored their philanthropic engagement in the past and in the present, as well as their plans for the future, in order to understand the key barriers and accelerants that affect both the quantity and the quality of their giving of time and money.

In particular, we have sought to understand what prompts this group of people to move from the casual and reactive generosity that typifies charitable giving in this country, to become the committed, pro-active, strategic supporters of charitable causes that are needed in order to build a serious culture of philanthropy in the UK. We argue that there is a clear role for policymakers and practitioners in kick starting and continuing these philanthropic journeys, and indeed that the potential benefits are too important and significant for this development to be left to chance.

Context

This section explains the context for this study. It begins with an overview[3] of the research and the characteristics of our respondents, re-caps what is known about the giving and volunteering habits of the general population, and notes the extent to which our respondents are typical or distinctive.

About this research

The research was conducted during the Autumn of 2013. It involved a survey completed by 227 people as well as in-depth interviews with ten people. All respondents had engaged (or were still engaged) in long-term, structured volunteering opportunities, organised by the charity Pilotlight which connects senior business people with ambitious charities and social enterprises (see appendix 2 for further details).

Our respondents were typically high-earning males aged 45-54, which reflects the age and gender profile of senior business people. However, a third of the survey sample was female, the respondents' ages ranged from early 20s to over-65, and included a small number of lower-income earners.

While all respondents were either current or past 'Pilotlighters', the amount of time they had spent undertaking a structured, supported, time-limited volunteering placement ranged from less than 6 months to over three years, with the most common response (30%) being between one to two years.

Further information on the methodology and respondents' characteristics can be found in appendix 1.

Who volunteers?

UK government data[4] shows that in 2012-13, almost half of the adult population (44%) had formally volunteered at least once in the past year, and just under a third (29%) had formally volunteered at least once a month. These figures are relatively stable over time, with some year-on-year variation[5].

The respondents in our study differ somewhat, being less likely to have volunteered than the general population – with around a third (32%) having done any formal volunteering before beginning their structured placement. However, definitions of what counts as volunteering are somewhat subjective, and a higher percentage (40%) of our respondents – more in line with the general population figure – report having done informal voluntary tasks, such as helping out a neighbour.

Two-thirds (66%) of our respondents are male. Whilst the same government data finds no statistically significant difference in the likelihood of men and women volunteering, it does find that men are more likely to do certain types of volunteering, such as serving on charity committees, which typifies the volunteering undertaken by the people we surveyed and spoke to.

Who gives?

Giving money to charity is more common than volunteering across the population. As shown in table 1, the annual UK Giving survey[6] finds that year-on-year over half the UK population donate some amount of money every month, with the precise figure ranging from 54% to 58% over the past decade.

Charitable giving is related to – though not fully explained by – income, so it is not surprising that in our sample of senior business people, most of whom are in the top 17% of earners[7], we found higher levels of giving.

Year	Percentage of UK population who donate in a typical month
2004/05	57%
2005/06	58%
2006/07	56%
2007/08	56%
2008/09	54%
2009/10	56%
2010/11	58%
2011/12	55%

Table 1: What proportion of people give money to charity?
Source: UK Giving surveys, NCVO/CAF

Context (cont)

As Table 2 shows, prior to starting their structured engagement with a charity, 73% of our sample had made irregular, reactive donations (such as putting money in a collecting box or sponsoring an acquaintance doing a charity challenge), 62% had made regular, smaller gifts (such as through payroll or standing order) and over a quarter (27%) had made at least one donation of £1,000 or more. This latter figure is more than four times higher than in the general population. UK Giving 2012 finds only 6% of the general population give £1,000 or more per year, which is the clearest indicator that our sample is skewed towards those with higher incomes and a higher capacity to give. However, despite being objectively wealthy, the vast majority of our respondents (73%) had never made a 4-figure donation, which fits the general pattern observed in the UK of widespread propensity to give, combined with equally widespread under-giving.

Why do people volunteer?

Our respondents share similar motivations to that identified in the government's Community Life Survey, which finds the desire 'to improve things and help people' is the main reason (cited by 53%) that people volunteer. Indeed, as Table 3 shows, 80% of our respondents cited the altruistic intention to 'give something back'. However, two-thirds (68%) of our respondents had a further rationale: the wish to develop their skills in a different context. In the general population, as depicted in the Community Life Survey, this type of competence-based thinking is less prevalent, with 27% wishing to use existing skills and 19% wishing to learn new skills. However, despite some difference in emphasis, our sample demonstrates a similar mix of other-directed and personal-development goals that are found in the general population of volunteers.

	Number	Percentage
Made irregular donations (eg putting money in a collecting tin or sponsoring an acquaintance)	157	73%
Made regular donations (eg through a direct debit)	133	62%
Informal volunteering in the community (eg helping a neighbour)	87	40%
Formal volunteering through a charity	68	32%
Made at least one donation to a charity, worth £1,000 or more	59	27%
Been involved in fundraising and asking other people for substantial donation s (£1,000 or more)	50	23%
Member of a charity's Board of Trustees	36	17%
Had volunteered to give a charity professional advice	32	15%
Had done no previous volunteering	21	10%
Had made no previous donations	4	2%

Table 2: Voluntary action amongst our sample prior to starting a structured volunteering placement

Reason	Number	Percentage
I wanted to give something back	107	80%
I wanted to develop my skills in a new context	90	68%
I wanted to do something different	65	49%
I wanted to learn about the nonprofit sector	47	35%
I hoped it would benefit my career	24	18%

Table 3: Reasons given by our sample for starting a structured volunteering placement

Reasons for not volunteering	Percentage of population
Not enough spare time	82%
Put off by bureaucracy	49%
Worried about risk/liability	47%

Table 4: Reasons for not volunteering
Source: Helping Out survey (Cabinet Office 2007)

Why do people give?

Donor motivation is an increasingly popular research question. A review[8] of over 500 such studies, conducted across the globe, identified eight main 'mechanisms' that are found to drive the giving of money:
1 being aware that need exists
2 solicitation (being asked)
3 low cost (due to tax breaks and/or matched funding) and donor benefits
4 altruistic tendencies
5 the desire to enhance reputation
6 the presence of psychological benefits
7 the desire to put personal values into practice
8 the belief that the donation will achieve the desired effect.

We did not ask our survey respondents to differentiate between their motivations for giving money and giving time, but the data gathered in our interviews is a good fit with these eight broad types of motivation.
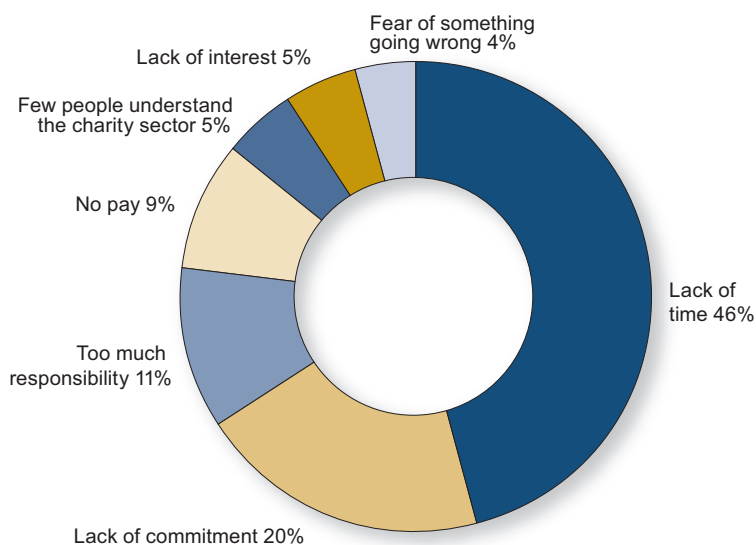
What stops people volunteering and giving?

It is not easy to do research on non-volunteers and non-givers as such people do not readily identify themselves or volunteer to be surveyed and interviewed, this is likely because generosity is a normative (generally accepted and agreed upon) value.

When non-donors do participate in research, it is difficult to differentiate between 'real reasons' and 'post hoc rationalisations' – for example, non-givers are far more likely to state that charities spend a high percentage of donations on 'overheads'[9], which could explain why they do not give, or it might be a useful rationale for not having given in the first place.

Amongst the few studies to capture the views of those who do not give time or money is the 'Helping Out' survey carried out for the Cabinet Office in 2006/07, which reports – as shown in table 4 – that the overwhelmingly most popular explanation for not volunteering is a lack of spare time (82%). Whilst no other explanation receives majority support, 49% claim to have been 'put off by bureaucracy' whilst 47% are 'worried about risk and liability'.

According to New Philanthropy Capital (2012), almost half (48%) of charities struggle to recruit trustees, who are the volunteers that comprise the legal governing body of a charity. A study commissioned by Ecclesiasitical Insurance (2012) identified lack of time as the major explanation (46%) followed by lack of commitment (20%), too much responsibility (11%), not being paid (9%), lack of people who understand the charity sector (5%), lack of interest (5%) and fear of something going wrong (4%).

Organisations seeking volunteers and donors have proved more willing to document why they believe that people fail to come forward, as the following chart[10] illustrates:

Why charities believe they struggle to recruit trustees
Source: Ecclesiastical Insurance/FWD Charity Research 2012

Context (cont)

One study[11] that attempts to explain non-giving of money by rich people claims that feelings of financial insecurity – however objectively curious – is the key factor, followed by a lack of confidence in charities to spend their money wisely, quoting one respondent as saying:

"A lot of charities are run by good-hearted people, and that's wonderful, but they're not necessarily efficient or good at getting value for money"

The findings of our study, shown in table 5, concur that lack of time, most notably due to commitments at home and at work, are significant barriers to greater engagement by senior businesspeople. Yet the second most common barrier we identified was a lack of awareness of the right kind of opportunities to get involved, which also deters those who would otherwise have the capacity and the willingness to do so. In addition, we also identify poor perceptions of charities, and poor experiences of charity management as common factors that deter potential donors and volunteers.

Despite the extent of these barriers – each of which was experienced by at least 44% of our sample – the people we surveyed and spoke to have nonetheless embarked on a volunteering placement, often as a result of receiving support from their employer. Having got started, in many cases these barriers were then overcome as a result of being placed in the right

organisation and receiving appropriate support. Most notably, widespread poor perceptions of how charities are managed are overcome in most cases (76%) where that view had been held – showing that such beliefs were based on perceptions rather than reality. At the other end of the scale, far fewer revise their opinion that they are too busy at home and work to be able to get involved – with lack of time remaining a barrier in the majority of cases. But table 5 shows much to hearten volunteer managers and fundraisers – in addition to revised views of how well charities are run, two-thirds (66%) of those who thought there were no suitable opportunities to use their skills for the public good, change their mind as a result of successful engagement with the charity sector.

So, whilst the barriers are real they are clearly not insurmountable. How to explain this situation? Survey data can provide headline figures, such as those presented above, but other methodologies are needed to dig deeper behind the numbers to understand how they relate to behaviours in practice. Therefore the next section presents findings from in-depth interviews with ten people who have undertaken structured, time-limited volunteering experiences that were supported by the charity Pilotlight.

Barriers to giving time and money	% of all respondents saying this barrier had affected them	% of those who had agreed this barrier affected them, saying…	
		this barrier has now been overcome	this remains a barrier
Work commitments	81%	16%	84%
Not aware of opportunities	66%	66%	34%
Family commitments	63%	12%	88%
Poor perceptions/experiences of charity management	44%	76%	24%

Table 5: Barriers to giving time and money amongst our sample

Findings

This section presents further findings from the survey, regarding attitudinal changes and intentions regarding planned charitable behaviour in the future. But it begins with presenting the findings from ten in-depth interviews. The five key themes that emerged in this aspect of the data collection shed a surprising light on the pre-existing outlook of those who have the potential to make a major philanthropic contribution, as well as a reassuring confirmation that interventions can – and do – have the capacity to help these people to begin and accelerate their philanthropic journeys.

The five themes are:

1   Many people who understand the need for strategy in their professional working lives were not at all strategic in their private giving, before undergoing a supported placement.

2   There was a lack of awareness of how to go about finding appropriate volunteering opportunities, coupled with a deep-seated fear that private sector skills would not be useful to charities.

3   Those with a capacity to make significant gifts of time, treasure and talent often harbour deep-seated concerns about the professionalism of those running charities.

4   Negative assumptions about how charities work can be over-turned once people get engaged with them in a meaningful way. This process of growing in understanding and confidence has an impact on their future philanthropic plans.

5   The experience of undertaking structured and supported volunteering placements brings significant benefits to the volunteer, as well as to those they helped.

Each of these themes will now be illustrated with quotes from the interviews. This section ends with longer quotes from two interviewees, which chart the development of their philanthropic journey over time, highlighting the pivotal role played by their experience with Pilotlight.

Firstly, we found that many people who are strategic in their working life, were anything but when it came to their giving:

"It was only giving money, in very small amounts – it was like everybody else, you just give a little… reacting to things happening in the news, there was no strategy behind it."

"A friend would phone up and say 'I'm supporting this charity' or 'I'm doing this bike ride' or whatever, and I'd give some money to that. But it was always – write a cheque and that's the end of it"

"I'd not really done much is the short answer. Giving through kind of monthly donations to a range of charities, but not really any meaningful involvement."

However, this problem was perceived as being resolved as a result of undertaking a supported placement with a charity:

"You become very thoughtful about your giving and you're not just going to write a cheque for any old thing."

"I've become a lot more strategic about my giving. For the first time ever this year I worked out a giving plan."

Secondly, we found a desire to apply skills gained in professional life to social causes, yet this was coupled with a lack of awareness of how to go about finding appropriate opportunities, and often a deep-seated fear that their skills would not be useful to charities.

"I wasn't quite sure what was expected of me and whether I could make any type of contribution. I have to say, I was very nervous of making any type of meaningful contribution to the [charitable] organisation."

"you wonder what the hell are you going to be able to do for a charity. But I quickly learned there was quite a lot I could do."

"I didn't want to make cakes, and at the time I certainly didn't have the personal wealth to give on a large scale, although that's changed in the years since I joined Pilotlight, so at that point I thought the only thing I can give is my skills"

Findings (cont)

Thirdly, those with the capacity to make significant gifts of time, treasure and talent often harbour deep-seated concerns about the professionalism of those running charities, and associated worries that their time and money will be wasted by 'well-intentioned' but poor performing charity leaders:

"I always had this idea that you had to be careful with charities because a lot of it is wasted money."

"I want to know why they need the money and how they're going to spend it, the leverage they're going to get from it, and I want to be able to have continuing dialogue with them."

"The charity sector is still seen as weak."

Fourthly, assumptions about charities are over-turned once people engage with them in a meaningful way and this process of growing in understanding and confidence has a major impact on future philanthropic action:

"I've discovered that there's a whole different world out there. What I've discovered is the passion and the commitment of everybody in all of those charities I've worked with. It is incredible and it's a real lesson to me as a banker… it has opened my eyes and it's given me a real respect for what's going on out there and the challenges that people face... It's extraordinary how hard people work in a charity."

"I had no network in the third sector, so it's helped to create that network… it's educated me about some of the key issues that small charities face, so that's given me the confidence to say 'I can see the role I can have in a small charity'. I think without having been involved with Pilotlight, if that opportunity had come to me and somebody had said 'would you like to sit on that board of trustees' I'd have said no, because I don't know what I can give you, I don't understand this sector, I don't know what my role would be, I don't think I have the skills. And I think Pilotlight has given me the confidence to say that I can contribute in an invaluable way to being part of a charity."

"It's been, personally, a really good learning experience of understanding a bit more about the charity sector".

Fifthly, the experience of undertaking a structured volunteering placement brought significant benefits to the volunteer, as well as to those they helped:

"We're helping a number of people who are less fortunate, but at the same time we're building a skill set, we're meeting other people, we're getting a perspective on the world… that's what's nice about it, it isn't just giving."

"It was just an extraordinary growth experience for me, both learning from [the charities] and also realising that I did have something to give. I skip into those meetings; it's the meeting that I look forward to most in the month. I really feel like I'm giving, I'm making a difference."

"Normally dinner parties are pretty dull – where do your children go to school and what do you do for work – so you need some catalyst to change the conversation, and that catalyst is me talking about Pilotlight now."

The idea that people go on a philanthropic journey is encapsulated in the following comment, which charts a typical path from low-engagement, to embarking on a learning process, growing in confidence and commitment, and realisation that philanthropy generates benefits for both the intended beneficiary and the giver:

"[At first] my giving was utterly random… I've been very lucky because in my life I've not been touched by any great sadness or tragedy, I just hadn't really been touched massively by something. And I just had no bandwidth to think about anything other than my family and my job. Once I had more time to devote, I really wanted to be able to give something back, so I did go looking for it [for Pilotlight]… When you start in the charitable world as a businessperson it's hugely humbling because you see people doing the most amazing things. The next thing is that you're intimidated by it, because you think 'well, I don't know enough that is relevant'… Then after a while your confidence builds and you realise that actually you might have insight or a different approach to something that is genuinely helpful… That's then massively rewarding in a way you don't get so much from your day job."

A different philanthropic journey begins with more enthusiasm for getting involved, but shows the importance of support to harness that enthusiasm:

"I was the guy at school who ran the charities club, and at university I was the welfare officer, championing AIDS awareness and gay rights and all that stuff. I thought that naturally I was going to be doing stuff, but post-university there's a bit of a dip, so I ended up running marathons – there were a lot of fundraising events. I now have two year old twins and I've moved from being time-rich to fairly time-poor, so I came to a point of realisation that I wanted to make a much more efficient use of my time. The Pilotlight model where I can contribute my thinking and use my professional skills for free, makes a lot more sense compared to doing hours and hours of training for marathons. In five years time when the kids have got friends and we're just boring to them, then I might ramp it up. But I do think it helps to have an ecosystem around when contributing time, and now my giving is based on causes I feel passionate about, but being much more strategic about how to put the money in, thinking about leveraging value… If I didn't do something like Pilotlight I would lose the emotional drive that I had. I genuinely think there is a strong proportion of UK society that wants to do something, and it's about trying to tap into that and harness it in the most effective way."

Looking to the future

Before moving onto a discussion of the data in the next section, we present two sets of further findings from the survey data that shed light on the longer-term impact of undertaking structured, supported volunteering placements.

Firstly, table 6 shows that this experience changes attitudes as well as behaviours – well over half of respondents report taking greater care in selecting the charities to which they give their time and money (64% and 59% respectively), and almost half (42%) express regret at not starting to volunteer sooner.

Secondly, our survey finds that hopes for continuing and increasing engagement with good causes is high. Table 7 shows that more than half the people who participated in a structured volunteering placement plan to have significant involved with charities – as trustees, donors and volunteers – in ten years time. If realised, these behavioural changes over the coming decade should bring significant benefits to the charity sector, including a greater supply of trustees coming forward, an increased body of major givers capable of, and willing to make, 4-figure donations, as well as a boost to the number of charitable legacies.

The figures in tables 6 and 7 should be of interest to those responsible for seeking the voluntary resources that are essential for charities to operate, because they show that more structured, supported, time-limited experiences of volunteering has achieved three significant outcomes in our sample:

1 A doubling in willingness to become long-term committed volunteers.
2 A 12% increase (from 29% to 41%) in willingness to make gifts worth £1,000 or more.
3 A three-fold increase in willingness to serve as a trustee.

The reason these outcomes are so crucial is discussed in the following section.

Statements regarding attitudinal changes	% agreeing with statement
Organisations such as Pilotlight are important entry points to volunteering and charitable giving	76%
I have gained an appreciation of the role of active trustees through my experiences with charitable organisations	72%
I now take greater care in choosing which charities I volunteer with	64%
I now take greater care in choosing which charities I donate to	59%
I now formally volunteer more than before I joined Pilotlight	48%
My experience has made me more aware of charities in my local area	45%
I wish I'd started volunteering sooner	42%
Seeing how charities operate and spend donated monies has made me more inclined to donate	38%
I now informally volunteer more than before I joined Pilotlight	37%
I now give more than I did before joining Pilotlight	35%

Table 6: Changes in attitude after completing a structured volunteering placement

Statements regarding planned charitable behaviour in ten years time	% agreeing with statement
I will be a charity trustee	63%
I will be formally volunteering with a charity	63%
I will be giving regularly to charity	58%
I will be volunteering informally in my community	47%
I will have made at least one donation of £1,000 or more	41%
I will be helping charities to fundraise	35%
I will have a charitable legacy in my will	28%

Table 7: Planned charitable behaviour in 2023

Discussion

The data confirms the need to approach philanthropy as a dynamic, rather than static, activity, because people's decisions to start, stop, slow down or accelerate their giving makes more sense when viewed over an extended period of years rather than as a 'snapshot' of a moment in time.

In the light of the findings presented above, this section contains two substantive contributions:

1 a typology of barriers to giving that need to be overcome in order to unlock people's life-long philanthropic potential.

2 two models illustrating the different trajectories of unsupported and supported philanthropic journeys.

This sections ends by discussing the importance and impact of achieving the outcomes described above, in terms of more volunteers, more larger donations and more trustees coming forward to serve on charity boards.

(1) Barriers that prevent and stall philanthropic journeys

The research identifies a number of barriers that prevent people getting started on their philanthropic journeys, or progressing far beyond the starting point. Drawing on both the survey and interview data, we suggest that these barriers can be summarised in six archetypes as follows:

I   **Nothing to offer** – despite experiencing significant success in their professional lives, these people have a surprising lack of confidence that they have anything useful to offer a charity.

II   **Nothing to gain** – these people are not drawn to volunteering and giving because they struggle to see how helping good causes can help their career.

III **Analysis Paralysis** – these people want to help but their concern to find the 'right' cause to help in the 'right' way has stopped them making any substantive giving or volunteering decisions.

IV   **Burnt Fingers** – these people have been put off donating and volunteering because of disappointing previous experiences that failed to meet their expectations of making a substantive difference.

V   **Too busy at work** – these people feel that the long hours they spend at work leaves them unable to get more involved with good causes.

VI   **Too busy at home** – these people feel their commitments at home hold them back from making a bigger voluntary contribution.

It is striking that some high-income, high-achieving professionals are being thwarted in their desire to help by barriers that can be tackled if the will and resources exist. The first two barriers – 'nothing to offer' and 'nothing to gain' can be tackled by greater efforts from charities and intermediaries to involve prospective volunteers in charities where there is a good 'fit' of both donors' skills/expertise and the benefits they hope to gain as a result of getting involved. For example, if a potential volunteer wishes to gain a particular new skill to take back to their day job, or hopes to apply existing expertise to solve a social problem, then this should be factored into the roles they are offered. Likewise, if networking and expanding social contacts matters to a particular donor, then they can be steered in the direction of serving as a trustee or helping with organising prestigious events. These changes, we suggest, are particularly likely to be realised through structured, supported and time-limited volunteering opportunities. Such experiences – which involve accurate initial identification of the right placement, a thorough induction and on-going support – ensure that volunteers grow in confidence and realise they are making a valuable difference to both beneficiaries and to themselves.

The third barrier – 'Analysis Paralysis' occurs as a result of the very large number of charitable organisations seeking assistance, which results in many potential volunteers and donors feeling overwhelmed by the choice they face. But this barrier can be tackled with the help of intermediaries and organisations that exist to broker charitable volunteering placements, including Volunteer Centres and Councils for Voluntary Service that are based in many towns and regions; online portals such as www.do-it.org.uk that provide searchable databases of opportunities to get involved in charitable activity of a particular type or in a particular geographic region; and hosts that specialise in supporting particular types of potential volunteers, such as vinspired, which focuses on younger people and Pilotlight, which focuses on senior business people. More support is needed, though, for working people to engage – much support that exists for volunteering is targeted at the young and the socially excluded.

The fourth barrier is arguably the most frustrating, as it refers to people who have in the past offered their help but been deterred from continuing by bad experiences. These people are often those with the highest hopes of making a tangible difference, and who could therefore be amongst the most energetic and committed supporters of a charity. Yet their philanthropic journeys have hit the brakes for want of being placed in a charity that understands their change-making motivation, their desire for feedback on what has been achieved, their hope for education about how the charity works and their need to grow in confidence – in both what they have to offer and in what ultimate difference the organisation, and indeed the charity sector as a whole – can make. As the interview data illustrates, this barrier recedes when volunteers are placed in the

right organisations, become educated in how the charity works, grow in confidence that their contribution is making a difference and receive sufficient support to meet their personal and philanthropic goals.

The fifth and sixth barriers – 'Too busy at work' and 'Too busy at home' – may seem beyond the influence of anyone but the individual concerned, and indeed in some cases a life change such as retirement or at least progressing beyond the intensive early stages of a career, may be crucial to free up the time to start or increase philanthropic commitment. But in other cases these barriers can be diminished or removed with some effort from the host charity and/or those supporting the volunteer. A structured, time-limited placement that asks no more than a few hours a month, is within the reach of many busy people, particularly if supported by their employer. Whilst a small window of time is not sufficient for some types of volunteering – such as organising a fundraising event – it should be sufficient to harness the expertise of those with key skills that might otherwise be out of the reach of the charity. For example, someone with valuable marketing, finance or logistical skills can be supported to provide strategic advice that enables a charity to expand its work, attract further investment and reach a greater number of beneficiaries.

The next section describes a model that operationalises this understanding of the nature of the barriers and demonstrates how they can be tackled to free-up people's potential to embark on and accelerate their philanthropic journeys.

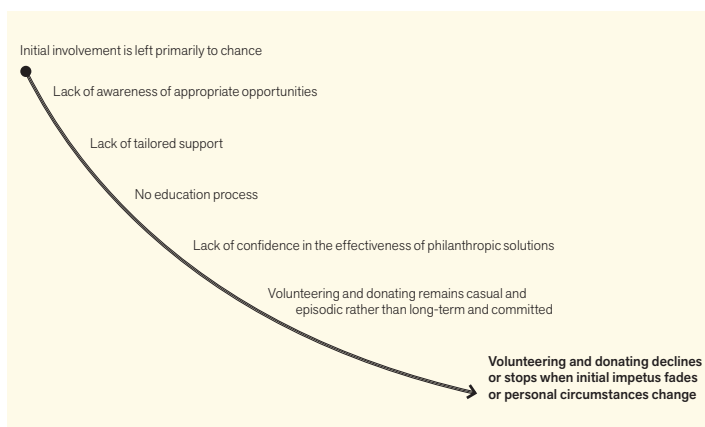## (2) The status quo versus the supported philanthropic journey

Philanthropy is an especially complex area of life because it exists in the intersection where private actions meet the public good. As Peter Frumkin explains, philanthropy *"has both public and private functions, enabling communities to solve problems and allowing individuals to express and enact their values"* (2006, p21).

The difficulty in understanding what philanthropy is and why it exists is exacerbated when we factor in the various motivations that drive philanthropic decision-making and the multiple obstacles that hinder the implementation of philanthropic intentions. Yet despite this complexity, the simple desire to 'do something good' can be harnessed and help change society for the better if we take a different view of those who could help.

Model 1 shows an 'unsupported philanthropic journey', typical of the status quo, in which people only get started because they are 'pushed' by chance – often as a result of a sad experience such as an illness or other misfortune – and feel compelled to engage with the issue they have stumbled across. Without any help to identify the best way to get involved or the most appropriate organisation to get involved with, they may embark upon an unsuitable volunteering experience that leaves them feeling profoundly dissatisfied – the qualified accountant being asked to stuff envelopes or the shy IT expert being pushed into a people-facing role are just two examples of how willing volunteers can be 'set up to fail'.
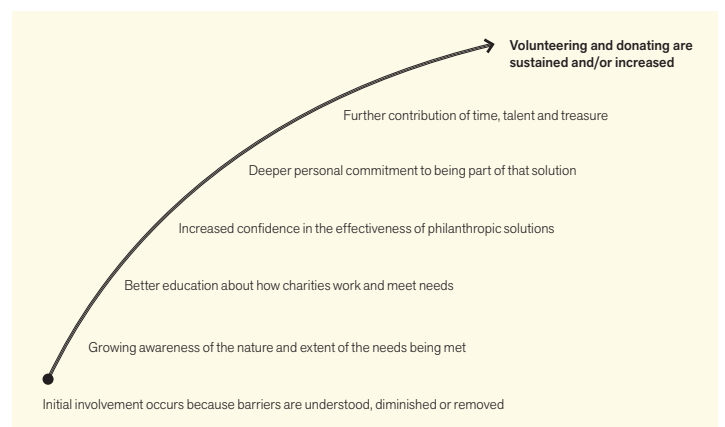
Model 1:
The status quo
How things often are – the unsupported philanthropic journey

Initial involvement is left primarily to chance

Lack of awareness of appropriate opportunities

Lack of tailored support

No education process

Lack of confidence in the effectiveness of philanthropic solutions

Volunteering and donating remains casual and episodic rather than long-term and committed

Volunteering and donating declines or stops when initial impetus fades or personal circumstances change

Model 2:
The ideal world
How things could be – the supported philanthropic journey

Volunteering and donating are sustained and/or increased

Further contribution of time, talent and treasure

Deeper personal commitment to being part of that solution

Increased confidence in the effectiveness of philanthropic solutions

Better education about how charities work and meet needs

Growing awareness of the nature and extent of the needs being met

Initial involvement occurs because barriers are understood, diminished or removed

Discussion (cont)

Even when a better match is made between skills, personality and role, things can still go wrong – for example volunteers may not be told about how the charity works beyond the department they are placed in, or shown any evidence of how the charity achieves success. The combination of poor placement, insufficient information and lack of evidence on outcomes, can result in an increasingly demoralised volunteer who fails to develop confidence in the effectiveness of their contribution, or worse – lack of confidence in the effectiveness of philanthropic solutions *per se*. Such a person is unlikely to scale up their contribution and may well scale it back or drop out as soon as the opportunity to exit appears.

Model 2 shows a 'supported philanthropic journey', in which the initial engagement occurs as a result of both push and pull factors – the latter being exemplified by proactive recruitment of people possessing certain skills or designing a volunteer programme that fits the demands of busy professionals with dependents at home. Once recruited, the individual learns more and more about the nature and extent of the needs that the charity exists to meet and their commitment is reinforced through interactions with front-line staff and – if appropriate – beneficiaries. With an understanding of how their contribution fits into the bigger picture, and being in possession of evidence that the sum of the parts does achieve worthwhile progress, this individual becomes more confident in the effectiveness of philanthropic solutions and more personally committed to being part of that solution. The personal benefits derived from a meaningful engagement with a cause they care about – including satisfaction and sense of purpose, enjoyment of new relationships and an overall enriched life – lead the individual to increase their contribution of time, treasure and talent to this cause and potentially to others that offer a similar supported experience.

Together, these models highlight the different consequences of either neglecting or supporting the donor, and reinforce the need to focus on the philanthropic journey. Focusing only on short-term gain – whether that be banking a donation or securing voluntary assistance with a specific task – and failing to recognise the needs of the person donating their time, talent and treasure to good causes, is unlikely to result in growing a stronger culture of philanthropy in the UK.

Concluding discussion: the importance of achieving better outcomes

The findings presented above demonstrate how the experience of undertaking structured, supported and time-limited volunteering placements led to three key outcomes amongst those we surveyed:

1   a doubling of intention to volunteer

2   a 12% increase (from 29% to 41%) in intention to make donations worth £1,000 or more

3   a three-fold increase in intention to serve as a charity trustee.

We now consider why each of these findings is so important to UK charities.

Efforts to encourage more volunteering. Government data, presented in the Community Life Survey, shows that in 2012-13 44% of people were formal volunteers. Our sample were initially less enthusiastic than the norm – just 32% of our respondents had previously been formal volunteers. Yet having become Pilotlighters, this almost doubled to 63% who intended to be formally volunteering in 10 years time. If realised, this equates to 48% more than the general population and an even more impressive increase of 97% for those in our sample.

The goal of building a stronger philanthropic culture. UK giving data (CAF/NCVO 2012) shows that only 6% of people give £1,000 or more each year; this figure is related to – but not fully explained by – income levels. As our sample is skewed towards higher income groups, three out of ten (29%) of our respondents had already made a gift of such a size before becoming a Pilotlighter. However, the experienced led to a substantial increase in their philanthropic commitment such that 4 out of 10 (41%) intend to be making donations worth £1,000 or more in ten years time. If realised, this increase would make a huge difference to the many good causes in dire need of funds, especially in the current economic climate that has created a double-whammy for charities, because it is harder to raise funds at precisely the same time that demand for their services is rising.

The trustee recruitment problem. Around half of all charities struggle to recruit trustees (NPC 2012). Currently 600,000 people are trustees, which is c.1.2% of the UK adult population. Our sample is unrepresentative in that pre-Pilotlighting, 17% of our respondents had been trustees, but the experience has a stunning effect on their intentions as 63% intend to be trustees in ten years' time. If realised, this almost three-fold (271%) increase would certainly help many charities that are currently struggling to recruit volunteers who are willing to take ultimate responsibility for the running of their organisation.

Conclusions

This study has taken a novel 'life-course' approach to explore the barriers to becoming engaged with charities and to understand what factors encourage people to get started, to continue and to accelerate their philanthropy.

The data reinforces existing research in this area, most notably the argument set out in NCVO's Pathways to Participation report, which claims that:

"Once they start, the quality of the participation experience is pivotal in determining whether people continue: the extent to which they feel they are making a difference and having an impact, whether they feel their contribution is valued and they are enjoying the experience and the quality of the social relationships with other participants. Although having continued access to the right support, resources and opportunities influenced people's decision to stay involved, a good quality participation experience was the single most important reason interviewees gave to explain their sustained participation" (NCVO 2011, p7)

The sample we surveyed and interviewed were fortunate to have experienced a 'good quality participation', which is noted as pivotal in the above quote.

This study also extends knowledge by identifying further barriers to the giving of time and money, and demonstrating how they can be successfully diminished and dismantled. The importance of understanding and tackling factors that stand in the way of unleashing the philanthropic potential of all our citizens is clear, especially in the light of the problems – discussed above – in recruiting volunteers, trustees and people willing and able to give sizeable donations.

Despite the UK being generally viewed as a generous country, and ranking near the top of international comparisons of generosity, such as the World Giving Index (CAF 2013), there is no room for complacency. The fact remains that much current giving is superficial, involving one-off donations (for example collecting tins, sponsoring friends/colleagues or attending gala dinners) rather than strategic major donations. Likewise, much current volunteering involves sporadic 'helping out' or short-term 'pro-bono' projects rather than sustained commitment.

Everyone has a philanthropic journey which is an individual's lifetime contribution of time, talent and treasure. Whether or not this journey is stunted, stalled or flourishing is usually left to chance, which means that many people barely 'leave the station' unless a random factor – often involving misfortune – prompts them to become more deeply involved in good causes. Having got started, the likelihood of continuing is reliant on further factors, such as learning how charities function, growing in personal confidence and receiving assurance that contributions are making a positive difference. The research presented in this report shows that it is possible to intervene and give support so that people's journeys start earlier, and go further and deeper, resulting in greater benefits to both the individual and wider society.

In sum: structured, supported, skills-based and time-limited involvement with a charity or social enterprise provides an efficient and effective opportunity to overcome many of the barriers facing those who wish to get started or accelerate their philanthropic journeys.

The role of philanthropy in modern society has become too important to be left to chance, and the contribution of potential philanthropists matters too much to leave perceived barriers in place. It is time for government, charities, employers and individuals to take a more pro-active, enabling approach so that more people can start and complete the philanthropic journeys that will bring benefits to themselves and wider society.
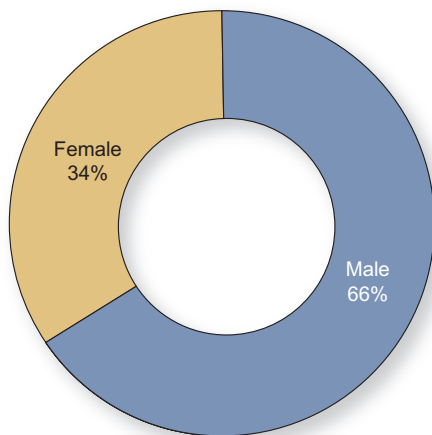
Recommendations

1 Politicians and policymakers need to understand that philanthropy is better conceived as a life-long journey rather than a series of unrelated giving acts. Much existing policy can be characterised as fragmented and focused on stimulating particular types of gifts, such as payroll deductions or charitable legacies. Shifting the focus to growing life-long givers rather than gaining specific gifts, is more likely to achieve the overall goal of growing a stronger culture of philanthropy in the UK.

2 Government needs to extend the initiatives it supports that encourage volunteering beyond the current focus on young people and retirees, because mid-life professionals also need targeted, high-quality encouragement and support.

3 Employers need to do more to facilitate their employees who want to use and develop their professional skills for the public good. This could involve, at a minimum, helping charities reach their workforce through workplace advertising and 'charity fairs'. It could also involve allowing flexible working practices and paid leave so that employees have time to volunteer. At best it involves paying for staff to undertake structured, supported volunteering opportunities where they contribute professional skills *pro bono*, that will set them on a life-time of deeper commitment to good causes and more strategic and impactful voluntary activity.

4 Employers need to support workplace giving of time and money by having an embedded culture of giving that is led and encouraged by business leaders. Employers should also recognise that they gain in terms of skills coming back to the workplace. When benefits are understood to be mutual, that leads to more sustainable relationships between companies and charities.

5 Charities need to be more aware of what it is that donors of time, talent and treasure have to give. They need to take account of donors' interests to provide a range of opportunities that meet their goals and to use a personal approach – including the use of professional networks – to invite and welcome new donors.

6 Charities need to curtail fatalistic assumptions that good volunteers are hard to find because they lack interest, are scared of the responsibility or put-off by lack of payment, and instead tackle the genuine barriers that exist due to low awareness of opportunities to get involved, and poor perceptions of how charities are run.

7 The generous majority of our population needs to consider how their giving of time and money can become less superficial and more strategic, which will bring greater benefits to themselves as well as to the causes they are helping. They need to back charities by giving regularly and through tax-efficient methods such as Gift Aid and Payroll Giving.

8 More research needs to be undertaken to better understand the concept of the 'philanthropic journey'. Whilst this paper – and others that it builds upon such as the NCVO report 'Pathways to Participation' – present persuasive evidence of the need to change how we understand what encourages people to begin and continue their involvement with good causes, and how to tackle the barriers that prevent the full flowering of the philanthropic impulse, there is much more work to do. In particular, more research is needed on groups other than senior business people (such as people in other occupations including medicine, law or civil servants) as well as studies that focus on other socio-demographic characteristics (such as working mothers or child-free professionals). Further studies could fruitfully explore a wide range of issues focused on the concept of 'life-long philanthropy', such as how donors use different giving mechanisms at different stages of life, how their views on collaborative giving change and how their giving decisions change in relation to their changing relationships with the generations above and below them. Such a body of work could collectively present a viable alternative to the present literature, which primarily conceptualises philanthropy as episodic and disjointed, rather than inter-connected and contextualised within an individual's life-course.
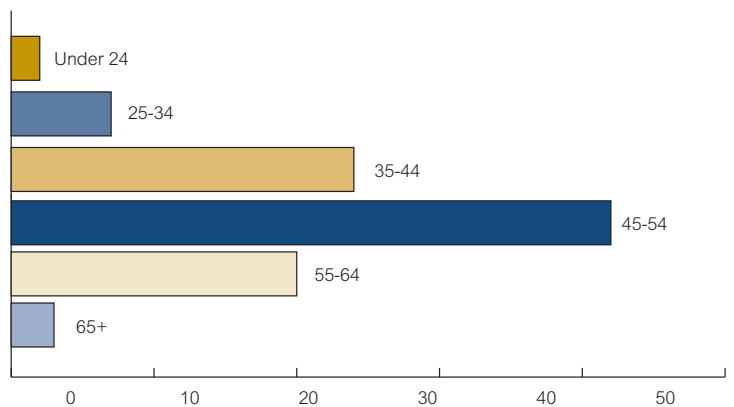
Appendix 1:
About the research

The research was conducted between August and October in 2013. It involved a survey completed by 227 people and in-depth interviews with ten people. All respondents had engaged in long-term, structured volunteering opportunities, of the type that are identified and supported by Pilotlight.
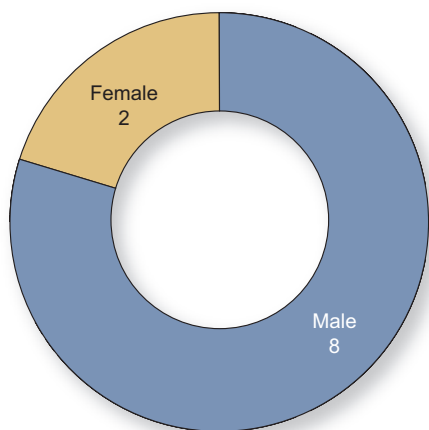
Our respondents were typically high-earning males aged 45-54, which reflects the age and gender profile of senior business people. However, a third of the survey sample were female, respondents' ages ranged from early 20s to over-65s, and included some lower-income individuals.

Gender of survey respondents

Age of survey respondents

Gender of interviewees

Income of survey respondents	Percentage
Basic-rate taxpayer (earn <£37,400)	6%
Higher-rate taxpayer (earn between £37,401 - £150,000)	62%
Additional rate tax payer (earn £150,001 or more)	32%

NB: figures refer to tax rates in the financial year 2013/14

As in the general population, many of our respondents had given time and money before, ranged from having less than 6 months experience and up to ten years

Length of time in a structured, supported, time-limited volunteering	Percentage
Less than 6 months	16%
6 – 12 months	19%
Between 1 and 2 years	30%
Between 2 and 3 years	17%

Appendix 2:
About Pilotlight

Pilotlight enables ambitious charities and social enterprises to help a greater number of people, and to achieve positive social change.

Pilotlight is a charity which matches leading private sector professionals with small charities, using their skills and experience to support them in developing strategic and business plans. Since 2003 it has recruited over eight hundred volunteers and helped nearly 400 charitable organisations, which collectively work to help improve the lives of more than 3.6 million people, from children with learning disabilities to isolated older people.

The skills coaching provided by Pilotlight to date is worth over £11 million. On average, partner charities experience an increase in income of at least a fifth after their year of working with Pilotlight and are able to help 40% more people.

Teams meet their partner charities every month over a 12-month period. An experienced project manager facilitates each project, ensuring that work remains focused and effective. The success of Pilotlight is achieved by creating handpicked teams of business leaders to work with the management of a charity and the expertise of Pilotlight project managers who oversee the whole process.

The volunteers - known as 'Pilotlighters' – come from a range of corporate sectors and have a variety of skills such as logistics, marketing and finance. Charities are then matched with a team of four Pilotlighters, chosen specifically for their range of skills and experience, who support them to develop strategic and business plans.

Pilotlighters help charity leaders to create more sustainable and efficient organisations by offering the kind of high quality, challenging mentoring that is normally only available to top corporate executives.

The process is about exchanging skills so that partner charities are not the only ones to benefit – Pilotlighters have the opportunity to test their talents in a new and challenging context, network with peers from other industries and disciplines, and learn new skills and approaches that they can bring back to the organisations where they work.

Pilotlight's vision is a world in which charities and business work together to achieve positive social change.

Pilotlight's mission is to help charitable organisations have a greater impact on more people. This is achieved by:

- using a unique method that matches business leaders with charitable organisations to equip them with, or coach them in, the skills they need to succeed and/or achieve long-term sustainability.

- increasing the impact of the charities that Pilotlighters are placed in, and increasing the number of people they reach.

- building a community of philanthropists.

- promoting Pilotlight as a benchmark of excellence.

Appendix 3:
References and Further Reading

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Online sources of information including regular news and free bulletins

Centre for Philanthropy, University of Kent – academic centre that makes research reports freely available online and has a blog and e-newsletter. www.kent.ac.uk/sspssr/philanthropy

Charity Commission – website of the Charity Commission for England and Wales, including the Commission's guidance, research, searchable register of charities and supporting documents such as annual reports & accounts. www.charity-commission.gov.uk

City Philanthropy – promoting more effective philanthropy among city professionals. www.cityphilanthropy.org.uk

Guide to Giving, 3rd edition (2008) Produced by ACF/Philanthropy UK: www.acf.org.uk/uploadedFiles/Publications_and_resources/Publications/Publication_repositry/AGuidetoGiving3rded.pdf

New Philanthropy Capital – research and consultancy to make charities and funders more successful in achieving their missions; website includes access to Newsletter and many free reports. www.thinknpc.org

Philanthropy Impact – formed in 2013 by the merger of Philanthropy UK, EAPG and PAF), an online and offline organisation making sense of and inspiring philanthropy. www.philanthropy-impact.org

UK Community Foundations (known as Community Foundation Network until 2013) supports community foundations across the UK. www.ukcommunityfoundations.org

Endnotes

1   Information about this project and the final report are available at http://pathwaysthroughparticipation.org.uk/

2   The history, approach and outcomes of Pilotlight are provided in Appendix 2

3   Appendix 1 contains fuller information on the methodology

4   as reported in the Community Life Survey

5   for example in 2010-11 the Citizenship Survey (the precursor to the Community Life Survey) reported that 39% of the population formally volunteered at least once that year and 25% formally volunteered every month,

6   UK Giving was researched and published by NCVO/CAF from 2004 until 2012, copies of the reports are available online www.cafonline.org/publications/2012-publications/uk-giving-2012.aspx

7   Being a higher-rate taxpayer means an individual is amongst the top 17% of UK earners, whilst additional-rate taxpayers constitute the top 1% of UK earners, according to HMRC 2012.

8   This paper, *Generosity and Philanthropy: a literature review,* by Rene Bekkers and Pamala Wiepking was published in 2007 and is available online https://generosityresearch.nd.edu/assets/17632/generosity_and_philanthropy_final.pdf

9   For example, see the data contained in *Robin Hood in Reverse: exploring the relationship between income and charitable giving*, by Beth Breeze (2006), p41. Available at http://eprints.lse.ac.uk/29223/1/VSWP3_Breeze.pdf

10 this chart appears on p.4 of an online document produced by Ecclesiastical.com: http://www.ecclesiastical.com/Images/trustee-sales-aid.pdf

11 This study is discussed in chapter 8 of *Richer Lives: why rich people give* by Beth Breeze and Theresa Lloyd (2013), published by the Directory of Social Change in London.