Taking the Long View: Using historical perspective and thinking to inform current practice and debates in philanthropy

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Thesis submitted for the degree of Doctor of Philosophy (PhD) in Philanthropic Studies

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Kent Business School, University of Kent

Year of submission: 2025

Word Count (Supporting Statement): 16,000

Word Count (Portfolio): 74,073

ABSTRACT:

This thesis, submitted for the award of PhD by publication, presents a body of work which explores the ways in which historical perspective and historical thinking can help to inform current practice and debates in philanthropy.

The history of philanthropy has been studied for a long time and generated a rich literature, yet significant elements of it remain little known or understood among current practitioners, or even among scholars in the growing interdisciplinary field of Philanthropic Studies. The publications in this thesis portfolio - two books, a series of exhibition panels, a chapter in an edited volume, and a journal article – are reflective of a wider body of work produced over two decades working in the field of philanthropy, in which a clear common thread has been an ongoing attempt to demonstrate the relevance and value of history to a practitioner audience. The research draws on a wide variety of historical sources – both primary and secondary – as well as on an extensive Philanthropic Studies literature.

Across these works, a number of key linking hypotheses emerge: namely that knowledge of history brings practical benefits for philanthropy practitioners; that there is a specific mode of "historical thinking" which can add value to current debates about the nature and role of philanthropy; and that historical perspective can help philanthropy practitioners to think more effectively about the future. I argue that the collected publications represent a cohesive and significant contribution to the field of Philanthropic Studies; and in particular to the understanding of history, and appreciation of its value, among philanthropy practitioners.

Author's Declaration

I declare that this thesis is a presentation of original work and I am the sole author. This work has not previously been presented for an award at this, or any other, University. All sources are acknowledged as References.

I declare that all the published works in the portfolio which forms the evidence base for this thesis are solely authored by me. I own the copyright for each of these works and have secured approval from the relevant publisher for their use in this portfolio. Four out of five of these works are available under Creative Commons licenses; one has been made available for the purposes of submission by Bristol University Press but is not available under a Creative Commons license. All of these published works have been referenced within my thesis.

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Supporting Statement

1. INTRODUCTION

In one sense defining “philanthropy” is fairly straightforward; almost any book on the subject will tell you that it literally means “love of humanity”. However, this apparent simplicity masks the fact that finding a definition which captures all the myriad different senses in which the concept has been understood is far more difficult, to the extent that some scholars argue philanthropy is an “essentially contested concept” which will never allow of a single agreed definition. (Payton, 1987; Daly, 2012). To move forward, therefore, it is necessary to adopt a working definition; for the purposes of the works in this portfolio the broad definition of philanthropy as “private action for the public good” offered by Payton (1987, p.1) is used. However, it is important to keep in mind that the limits of any such working definition are likely to be tested; and that we must see this process of testing as valuable in its own right, in terms of contributing to our understanding of philanthropy.

It should be noted that whilst the author favours a broad definition of philanthropy that is not limited to monetary giving or to the activities of the wealthy, and has taken a deliberate decision to adopt an inclusive framing that encompasses a wide variety of everyday acts of generosity, it is also the case that the historical examples found across the works in this portfolio do overall skew towards those which reflect the activities of the wealthy. In part, as discussed in section 4, this is because there is an imbalance in archival sources – and consequently in both the primary and secondary literature it gives rise to – in which the wealthy and powerful are over-represented

simply by virtue of the fact that their position in society has tended to mean that they leave a more obvious mark on the historical record. But it also reflects the fact that even within a broad and inclusive definition of philanthropy, there is something distinctive and important about the giving of the wealthy, because this raises specific concerns (e.g. about power or antidemocratic influence) that do not really apply to giving at more modest levels, so elite philanthropy has tended to attract far more critical analysis over time. It should also be noted that whilst the author is a keen advocate for a more globalised understanding of philanthropy among modern practitioners, and for the importance of understanding and giving equal weight to different cultures of giving around the world, the examples found across the works in this portfolio are largely limited to the anglophone world, and in particular to the UK and the US. This is solely a reflection of the availability of relevant English-language source material, rather than of any prior assumption that these contexts are somehow more important than others or more likely to offer insights.

Despite the challenges of defining philanthropy, it is clear that many of the concepts and ideas that will form likely components of any understanding of philanthropy have been widely studied throughout history. Philosophers since antiquity have grappled with questions about why and how we should give (e.g. Aristotle, 2014; Kant, 1997; Singer, 1972, Schneewind, 1996); economists have tried to account for seemingly irrational altruistic behaviour (e.g. Smith, 2008; Samuelson, 1993; Andreoni, 1990); political theorists have explored the role and legitimacy of private giving within democracies (e.g. Wollstonecraft, 1995; Mill 1869; Reich, 2018; Saunders-Hastings, 2022); anthropologists and sociologists have sought to

understand the role that gift-giving and generosity play in our societies (e.g. Mauss, 1990; Hyde, 1999); and psychologists and neuroscientists have explored the factors that lead us to give and which shape our decisions about how to give (e.g. Oppenheimer and Olivola, 2011, Wilson, 2015). Philanthropy has also been explored through literature, art and popular culture for many hundreds of years (Bremner, 1996; Christiansson, 2007).

The emergence of Philanthropic Studies as a coherent standalone academic discipline is, however, a much more recent phenomenon, which can be traced back to the 1970s and 1980s. And just as there is no universally agreed definition of "philanthropy", there is not broad agreement on what defines Philanthropic Studies a field. The authors of a 2014 study looking at "philanthropy education" in the UK and Europe defined it as, "the study of, or training in, the history, theory and practice of private contributions of money or other resources with a primary goal to benefit the public good". (Keidan et al, 2014, p. 4). The Lilly Family School of Philanthropy at Indiana University (one of the world's major centres for research and teaching on philanthropy), meanwhile, describes its MA course in Philanthropic Studies as:

> *"A gateway to understanding the social, cultural, political, and economic roles played by philanthropy and nonprofit organizations, [which] facilitates broad understanding that prepares graduates for leadership practice within the nonprofit sector".* (Indiana University, 2024).

Whilst there is space within both of these definitions to allow for abstraction and theoretical study, it is clear that the notion of practice remains central to the field of

Philanthropic Studies; which then raises important questions about what we mean by "practice" in this context, and the extent to which it is synonymous with "profession".

The notion of a 'profession' is an important one: indeed, the social historian Harold Perkin famously argued that the rise of a 'professional class' from the late 19th century into the 20th century is one of the key factors that shaped modern British society. (Perkin, 1989). Precisely what defines a 'profession', however, remains highly contested. Many proposals share common features – for instance a shared ethic of service, specified education requirements and qualifications, mastery of technical knowledge or the presence of professional bodies – but there is also significant disagreement amongst scholars as to which, if any, are necessary or sufficient conditions to define a profession. (Rothblatt, 1995). It is also clear that many of these features are not starting points, but rather the end results of long processes of development that are often far from linear, and which differ widely across domains, so any attempt to apply standardised criteria to evaluate different putative professions may be destined to fail. Despite this, there have been attempts to address the question of whether philanthropy as a field of practice can be considered a profession. Stauber (2010), for instance, uses a framework of seven standards required to define a profession proposed by Bledstein (1976) to argue that philanthropy cannot be considered a profession as it does not meet all of the required criteria.[1] In a response based on a survey of 500 grantmaking professionals,

[1] Bledstein's proposal, which is should be noted is grounded in the US context, is that being a professional includes: a full-time occupation that is one's principal source of income; difficult and extensive training; theoretical training that precedes practice or apprenticeship; mastery of "esoteric but useful systematic knowledge"; receipt of a license or degree from a certified institution; provision of "technical competence, superior skill, and a high quality of performance"; and "an ethic of service which teaches that dedication to a client's interest takes precedence over personal profit".

however, Carpenter (2017) argues that philanthropy *can* in fact be considered to meet all of Bledstein's tests, and should therefore be seen as a profession. It is important to note that Carpenter restricts her focus to grantmaking within philanthropic foundations, so even if her conclusion is true it is limited in scope. Likewise, it is clear that similar arguments can be made that other aspects of philanthropic practice are professionalised, whilst maintaining that philanthropy as a whole cannot currently be seen as a profession. Furthermore, there are those, like Stauber, who question whether philanthropy should even aspire to professionalisation. (Stauber, 2010).

Whether or not philanthropy can (or ever should be) seen as a profession, it is undoubtedly a field of practice; and as it stands, there is still plenty of work to be done if we are to maximise the value of connections between practitioners and academics with a common interest in philanthropy. This is partly about making a compelling case to practitioners – through argument and example – for the value that academic knowledge and study can bring to their work, alongside any existing training and knowledge development they receive in the course of their job. It is also about making a case to academics for the value of engaging with practitioners; in terms of keeping abreast of key debates and trends in philanthropy and also ensuring that opportunities for using academic research and insight to achieve demonstrable impact are maximised.

The body of work presented in this portfolio is a contribution towards addressing this challenge, with a specific emphasis on connecting the academic study of the history of philanthropy with current philanthropy practice. Section 2 of this supporting

statement outlines three linking hypothesis shared across the portfolio, whilst section 3 considers the key epistemological and ontological assumptions underpinning the work contained within it. Section 4 details the research methodology used, and considers some of the relevant issues relating to the use of digital archives. Section 5 contextualises this portfolio within the wider historical development of Philanthropic Studies as an academic discipline, and considers the current status of the History of Philanthropy as a subfield. Section 6 provides further intellectual grounding for the linking hypothesis by considering how existing literature on the uses of history and the unique nature of historical thinking relate to the specific history of philanthropy. Section 7 then provides a descriptive overview of the elements in the portfolio, together with an argument for their coherence and timeliness as a body of work.

2. LINKING HYPOTHESES

The publications in this portfolio were not produced according to an explicit set of common prior hypotheses. They do, however, share an overarching conceptual framework which ties them together as a coherent body of work, and from which it is possible to infer several key linking hypotheses.

Linking Hypothesis 1: Knowledge of history brings practical value for philanthropy practitioners.

The first hypothesis linking the works in this portfolio is that knowledge of historical facts and information can have practical value for those working in the field of

philanthropy. It can provide a sense of continuity and lineage, as well as examples of approaches that have succeeded or failed which we can potentially learn from today. It can also enable institutions, and those working within them, to engage with potentially difficult aspects of their own past activities and funding in a constructive way. More broadly, it can foster an understanding of the deeper underlying causal and structural factors that have shaped philanthropy in the past and continue to do so today.

Linking Hypothesis 2: Historical thinking can add value to current debates about the nature and role of philanthropy.

One of the stated epistemological assumptions underpinning this portfolio (as explained further in the course of this essay) is that in addition to historical knowledge (i.e. knowledge of historical facts) there is a uniquely historical way of thinking, which reflects the tools and approaches that characterise history as a field (e.g. critical appraisal of source material, appreciation of complexity and contingency, identification of potential causal relationships etc). The second linking hypothesis for this portfolio is that this mode of thinking has particular value when it comes to debates about the nature and role of philanthropy at a time of increasing societal division and polarisation - when issues are often presented in unhelpfully binary terms in popular discourse - because thinking in a historical way encourages acceptance of complexity and nuance, and an appreciation of the biases that shape one's own views.

Linking Hypothesis 3: Historical perspective can help philanthropy practitioners to think more effectively about the future.

The third linking hypothesis is that as well as enriching our understanding of the present, a combination of historical thinking and historical knowledge can play a vital role in allowing us to think more effectively about the future. Past events may offer direct inspiration for new ways of doing things, and conversely an appreciation of the contextual factors and contingencies that led to certain things *not* happening (and perhaps of the counterfactuals that gives rise to) can help us to think more broadly when imagining the domain of possible futures. Likewise, those engaged in foresight and futures work need to be aware of the role that their own biases play, in the same way that historians have long acknowledged similar challenges when looking back at what has already happened. At a time when environmental, economic, societal and technological factors are posing major questions about the future shape of our society, it is increasingly apparent that there is a real need to think boldly about future approaches to philanthropy and the role we want it to play, so this aspect of the value of historical perspective - in helping us to look forward - is particularly important.

3. ONTOLOGY AND EPISTEMOLOGY

The works in this portfolio adopt a broadly Critical Realist (CR) approach to history. This is a philosophical system pioneered by the philosopher of science Roy Bhaskar, which attempts to find a productive middle ground between the failings of empiricism and positivism on the one hand, and those of constructivism and interpretivism on the other (Collier, 1994; Gorski, 2013), and which Steinmetz (1998, pp. 170-71) argues is the philosophy of science which "best captures… the explanatory practice of most historical social scientists".

CR adopts a form of 'depth realism' with regard to ontology (Steinmetz, 1988), positing a multi-layered reality made up of the Real, the Actual and the Empirical. The domain of the Real consists of deep structures, processes, inter-relations, and causal powers which exist independent of human awareness and are not observable (Gorski, 2009). These give rise to events in the domain of the Actual: some which will not be observed or experienced by humans, but others which will, and thus come to form the subdomain of the Empirical. (Gorski, 2013; Danermark, Ekström & Karlsson 2019). Ontologically, then, CR clearly distinguishes itself both from empiricist claims that objects only exist insofar as they are observable, and from constructivist or post-modernist claims that there is no separate language-independent reality. (Collier, 2004; Steinmetz, 1988; Gorski, 2009, 2013).

In epistemological terms, CR tends to combine both positivist and interpretivist elements. We can gain knowledge of the observable world through direct experience

and measurement of the elements within it, but at the same time we can also make use of non-empirical methods of knowledge production to bring understanding of the unobservable structures that give rise to those elements (Gorski, 2013). In particular, CR emphasises the use of *abductive* reasoning, a logical process of working backwards from a set of observations to the most likely possible explanation, which it is often noted reflects a familiar "common-sense" form of reasoning that we use all the time in our lives. (Gorski, 2004; Douven, 2025). For the historian, a major benefit of abductive reasoning within a CR framework is that since the goal is not to seek invariant laws that govern historical events, but rather to identify the complex blend of underlying causal powers and structures that best explain them, it is possible to acknowledge the unique nature of historical events whilst at the same time still being able to compare them in a meaningful way. (Mutch, 2023).

One of the core features which links the works in this portfolio is the use of comparisons across different historical events and time periods to develop insights that can inform current practice and debate, hence the account that CR offers of the legitimacy and value of historical comparison is of particular importance. As Steinmetz (1998, p. 174) argues, CR's ontological assumptions are key here:

> *"[Whilst] theoretical realism disparages explanations which invoke unique, nonrepeatable constellations of causal mechanisms in accounting for specific historical conjunctures… critical realism suggests that explanations of this sort are not inferior but in fact more adequate to the "open" and ontologically stratified structure of reality (both natural and social) outside of the experimental laboratory."*

Furthermore, as Gorski (2004, p. 373) explains:

> *"Critical realism insists on the ontological difference between events and mechanisms and on the ubiquity of the contingent, nonrecurrent, conjunctural determination of events within open systems like the social. This means that even events incomparable at the phenomenal level still may be amenable to explanation in terms of a conjuncture of generative causal mechanisms."*

The utility of historical comparisons, therefore, is not limited to events that are obviously similar at the empirical level, as long as it can be credibly argued that there is some identifiable social structure or theoretical entity that is common to the complex mixture of factors giving rise to each individual event. Indeed, according to Steinmetz (2004, p.392), "the goal of explanation is to investigate the vicissitudes of this conceptual mechanism across differing concrete contexts, cases and events." However, empirical similarity between historical events is still important, as this is often the grounds on which we group such events together in the first place, allowing us to identify potential mechanisms and structures that may have given rise to them:

> *"A critical realist comparative research strategy combines both orientations: comparison across mechanisms and across events. Empirical phenomena may be selected for comparison for explicitly political or "interested" reasons or because we suspect them of having similar determinants. But they also should be selected because they are believed to be relevant to uncovering or illuminating the causal mechanisms and structures of interest*." (Steinmetz, 2004, p.393)

Further to the epistemological claims already outlined, the works in this portfolio also make the assumption that there is an identifiable and unique mode of 'historical thinking'; the relevance and value of which is not limited solely to the study of history. This is explored further in section 6.

4. RESEARCH METHODOLOGY

A key thread linking together the works in this portfolio is the aim of informing current debates about the practice of philanthropy and its role in society by highlighting relevant historical precedents. (An approach justified by the adoption of a Critical Realist view of the nature of historical inquiry, as outlined in the previous section). The realisation that many of the critical questions about philanthropy which dominate discussion today are not ones that we are addressing for the first time - but are in fact new iterations of long-standing debates - can be hugely valuable for practitioners. In part this is because specific arguments and ideas that have been put forward in the past offer potentially rich sources of insight. But is also about simply knowing that previous generations of thinkers and practitioners have struggled with the same questions, as this can give us welcome reassurance that our own inability to find clear or simple answers is not so much a failure on our part, but more a reflection of the fact these questions are fundamentally complex - often bringing to light inherent tensions within the very notion of philanthropy that cannot be easily resolved.

Historians increasingly recognise that the contemporary narratives crafted by organisations and individuals are useful as sources in their own right. They might not offer a reliable guide to historical events, but when read critically - with a view to understanding their purpose and the biases and assumptions they reflect - they are hugely valuable in helping us to explore how different stakeholders have attempted to make sense of events and to shape how those events are interpreted by others. (Suddaby et al, 2010; Heller 2023). A core focus of the works in this portfolio is on understanding how philanthropy has been represented and viewed in the public and political spheres, so the most relevant historical sources are those which reflect attempts at sensemaking and narrative building about the nature and role of philanthropy, rather than sources which pertain directly to its practice, or to the issues and causes which philanthropists have tried to address. In terms of primary sources, this means an emphasis on discussions of philanthropy in newspapers, journals, pamphlets, and parliamentary records, as well as representations in cartoons, literature and art, rather than the archival records of individual charitable organisations or donors, which are less helpful in terms of understanding wider perceptions of philanthropy. (Except in cases where wider perceptions of philanthropy are clearly evident as specific concerns of particular individuals or organisations, and archival records capture their attempts at sense-making). As such, archival research has focussed on individual newspaper archives (e.g. The Times, The Financial Times, The Guardian), archive newspaper collections (e.g. British Newspaper Archive, Newspapers.com, Google News Archive), parliamentary and governmental archives (e.g. Hansard), image archives (e.g. The British Cartoon Archive, Welcome

Image Collection), and general-purpose archive collections containing journals, books and other publications (e.g. Jstor, ProQuest, HathiTrust, The Internet Archive).

The archives used for the research which led to the publications in this portfolio were largely digital ones that could be accessed online. There is an increasing body of literature exploring the impact digital technology is having on the work of historians: whether that is in terms of changing the nature of access to information, creating new methods and tools for historical research, or offering new possibilities for the publication and dissemination of knowledge. (Milligan, 2022). Within this literature there has been extensive discussion of digital archives and the questions they raise. Many scholars note that the digitisation of archives has, first and foremost, resulted in significant benefits. It has democratised access so that those who might previously have faced barriers of cost, time or accreditation which would prevent them from making use of physical archives are now able to find and use information that otherwise might have been impossible obtain (Ogilivie, 2016; Zaagsma, 2022). Search functionality has also made it possible for scholars to identify a larger volume and a wider spread of sources at a much quicker rate than would have been possible previously (Kim, 2022; Humbel et al, 2024).

Alongside these clear benefits of digitisation, however, are some important limitations and critical questions we must consider. Firstly, there is the obvious question of what is missing i.e. what is not in the archive, and why (Force & Wiles, 2021) To some extent this is a question that applies to all archives, not just digital ones, as any archive is a product of choices made in the past about which records are worth preserving and to what end, so we always need to ask why certain records are

present in an archive whilst others are not. There is also the ongoing risk of archival inequality, where groups and institutions that have greater resources and higher status are more likely to be able to create and manage their own archives - or to ensure that their records are included in other archives - and as a result appear much more prominently. This has often resulted in focus being skewed towards sources from the Global North, as well as towards sources which reflect the activities and interests of wealthier groups in society and more formal organisations (Trouillot, 1995; Carter, 2006; Olson, 2024). In the context of historical research on philanthropy, this often means far greater emphasis is placed on the role of the giver (i.e. the individual donor or philanthropic funder) than on that of the recipient, because the wealthy individuals and philanthropic funding organisations which play the former role are much more likely to have left a mark in archival records than the poor people and marginalised communities who had little voice in their own time, and are largely invisible in the archives. Likewise when it comes to charitable organisations, the work of larger, more formalised organisations is more likely to be visible in the archives than that of smaller, more informal civil society groups – even if, in reality, the latter actually account for the majority of activity within a period.

The same concerns about archival bias and omission apply to digital archives, but there are other factors to consider as well. For archives that are seeking to store digital records of non-digital objects, for instance, the process of digitisation itself is often costly and resource-intensive, as is the long-term storage of digitised material (Ogilivie, 2016). So, in addition to the choice that has already been made to put a record in an archive in the first place, a further decision needs to be taken about

whether it is worth digitising. (Even if the aim is to digitise an entire archive eventually, a decision is still likely to have been taken about what order to do that in and which records to prioritise). As Milligan (2022, p.18) notes:

> *"The sheer amount of digitized materials… obscures the reality that not everything is digitized. Most of it is not. Digitization is a resource-intensive process, both in terms of the scanning process and also in describing and making resources discoverable. Undescribed and thus inaccessible data are nearly useless. There are also considerable costs to preserving data in perpetuity. Accordingly, any user of digitized resources needs to ask: what has been digitized? What has not?"*

Practical considerations regarding the ease and feasibility of digitisation may also determine what appears in a digital archive. When it comes to written records, for instance, those printed in type face are easier to digitise than those in handwritten script – both because they are easier to read in the first place (with the latter sometimes requiring a significant degree of specialist expertise to read), and because Optical Character Recognition (OCR) technology, which is increasingly used to automate the process of turning photographic images of writing into digital records, is still more effective at dealing with typefaces than with handwriting (Muehlenberger et al, 2019). (Although recent studies such as Burchhardt (2013) have shown than OCR is also prone to significant errors when dealing with typed sources such as newspapers). When it comes to entirely non-written records, such as material objects, the challenges are even greater. Whilst it is certainly possible to create a digital record of a material object, it is far harder for this record to act as a genuine substitute for the object in question than it is for a digitised book to act as a substitute for a physical book, as there are likely to be additional sensory properties

of the object that are impossible to replicate using current digital technology (Newell, 2012; Meehan, 2022).

There are also legal and economic factors which impact the availability of information in digital archives. More recent published material, for instance, may well remain under copyright restrictions that prevent it from being made easily accessible in digital form (Jaillant et al, 2022; Pappaianou, 2025). Digital rights management systems and online loans mechanisms have been introduced in some cases, in an attempt to replicate the restrictions that would be in place in a physical archive or library, but it remains difficult to prevent the copying and replication of digital items, and the costs of doing so are high, which may prevent some institutions from attempting to digitise items under copyright. (Milligan, 2022) The cost of creating and maintaining digital archives also dictates that for many institutions it is seen as necessary to adopt a fully or partially commercial model in order to make them sustainable. (Milligan, 2022) This has resulted in a highly siloed landscape, where digital sources are often placed behind subscription paywalls or only available for purchase. The ability of individual researchers to access these sources is consequently determined by whether institutions they are affiliated to have subscriptions to the relevant services, or whether they can afford the costs themselves. For researchers who do not have the benefit of affiliations to large, well-resourced academic institutions, this may present a significant barrier. (Underwood, 2014).

Some of these considerations are relevant to the work in this portfolio, but they were not the determining factors in the choice to use digital archives. Rather, it was the

focus on public discourse and sense-making about philanthropy that dictated an emphasis on sources such as newspapers and parliamentary records, which are readily available in digital form. It is important to acknowledge, however, that the wider use of physical archives could also bring benefits in terms of uncovering further sources which offer insights on public discourse about philanthropy, so this presents a potential opportunity for further expansion of the research within this portfolio in future.

It has been noted already that the use of search tools to find materials within digital archives makes it possible for researchers to identify a far broader range of sources more quickly. However, it also brings new challenges. Some scholars argue that an over-reliance on these tools can lead to the erosion of vital skills of source analysis, because search results are often presented in the form of individual documents or sections within documents, removed from the broader context within which they sit, so it is harder to evaluate their credibility or to identify factors which need to be taken into account when assessing the information contained within them (Hitchcock, 2013; Putnam, 2016). Other scholars have raised concerns that in becoming reliant on search tools for historical research we cede control over the identification and selection of source materials to algorithmic systems whose criteria and operating principles are opaque, poorly understood, and known to be susceptible to biases of many kinds (Tilton, 2023). And even when they are working as intended, there is a danger that the effectiveness of search tools can itself present problems for the historian if it results in an over-abundance of information, as this may make it harder

to determine the legitimacy or importance of a potential theme (Kim, 2022). As Underwood (2014, p.66) puts it:

> *"How many sources do you need to establish the importance of a theme? Twenty? When searches were limited by networks of previous citations, that was a meaningfully high bar. But in a database containing millions of sentences, full-text search can turn up twenty examples of anything."*

This challenge is particularly pertinent to the work presented in this portfolio, where the identification of recurrent themes across different time periods was a common thread. To overcome this challenge, the author used references and citations in traditionally published and peer-reviewed sources to provide keywords and search terms, and conversely cross-referenced the results of searches in digital collections against themes that had been identified from peer-reviewed literature.

In addition to primary sources, the works in this portfolio also draw on a large body of secondary sources, including books; academic papers; publications from government bodies, think tanks and civil society organisations; and newspaper and magazine articles. In some cases, these were identified and accessed digitally – with all of the previously-discussed advantages and disadvantages that brings. A significant proportion of secondary sources, however, were accessed physically, through library rentals or purchases; and were identified by following references and citations from other secondary sources.

5. THE EVOLUTION OF THE HISTORY OF PHILANTHROPY AS A FIELD OF STUDY

To understand this portfolio of work as an argument for - and a demonstration of - the value of historical perspective and knowledge to practitioners in the field of philanthropy, it is necessary to set it within relevant wider context. In particular, it is important to understand how the history of philanthropy has developed as a field of study, where it stands today, and its relationship to the wider disciplines of history and philanthropic studies.

The lack of a straightforward definition of 'philanthropy' (as outlined earlier) presents a challenge when it comes to tracing the history of philanthropy as a field of study; and as we expand our horizons both geographically and temporally, the limitations of our definitions only become more apparent. Many cultures around the world have rich traditions of giving and generosity that do not necessarily fit neatly into definitions of philanthropy that have been developed in a Western context. (Ilchman et al, 1998; Wiepking, 2021). Likewise, as we look back to the past, we need to recognise that there are activities that we might consider as falling under our own definitions of philanthropy but were not framed in those terms by people at the time. Conversely, we may find that there are things that have been labelled as "philanthropy" in the past to which we might not apply the term today. As Davis (1996, p.4) warns, in the course of considering the notion of philanthropy as a virtue the classical world, we must be wary of "the dangers of identifying our use of a word with its earlier uses" and also of "the dangers in assuming that our contemporary

vocabulary is sufficiently supple to capture the arguments and presuppositions of our precursors".

Despite such definitional challenges, people have attempted to take a historical view of philanthropy since at least the 19th century. At first this mostly took the form of biographies or character portraits of known philanthropists that were broadly hagiographic in nature.[2] The mid-19th century then saw emergence of the social sciences, and an increase of interest in topics such as the distribution of wealth, the nature of poverty, the challenges of population growth, and the condition of labour (many of which had first come to prominence during the Enlightenment, but now found a much wider audience). Key early figures in the social sciences such as Auguste Comte also gave prominence to the role of philanthropy and voluntarism in society.[3] Concerns about the extent of poverty and potential threats to the social order prompted new efforts at social research and data collection (including, from 1801 the first census), which served to highlight the scale and severity of the inequality and ill health facing UK society, and provided the impetus for reform campaigns through the 19th century that challenged existing notions about the desirable structure of society. Initially, social research was itself a form of philanthropy, supported and often conducted by those with financial means, and

[2] E.g. John Aikin's 1814 book *A View of the Life, Travels and Philanthropic Labours of John Howard* (Aikins, 1814), John Stoughton's 1884 book *Howard, the Philanthropist, and His Friends* (Stoughton, 1884), or Austin Dobson's 1899 book *A Paladin of Philanthropy and other papers*, whose title essay concerns the philanthropist Captain James Oglethorpe, the founder of the project that eventually became the State of Georgia (Dobson, 1899).

[3] Comte coined the term "altruism" and devoted large parts of his writing to exploring its implications (Dixon, 2008).

with the support of volunteers from the middle and upper classes;[4] by the end of the 19th century, however, it had started to become more formalised with the creation of university departments focussing on social research and the study of social work.

Out of this research, many new ideas about the nature and role of philanthropy began to emerge, alongside a more systematic understanding of its role in society. This was reflected in the publication in 1905 of Benjamin Kirkman Grey's *A History of English Philanthropy: From the dissolution of the monasteries to the taking of the first census,* which attempted a more systematic account than had been seen previously of the historical development of philanthropy as a structural – rather than individual - phenomenon within society. (Kirkman Gray, 1905). Despite this early landmark, a perception that the history of philanthropy was an under-researched area remained, so that in a 1933 paper the American social scientist Arnaud Marts was able to lament that:

> *"History should shed much light on this problem, for philanthropy is a deeply rooted function of the human race, but unfortunately adequate records have not been kept of the race's experience in this field. There is practically no separate literature on the subject of financing philanthropy. Only by the most general and extensive reading may one obtain even a hint as to how preceding generations and different peoples have taken hold of this duty."* (Marts, 1933, p.13).

It is important to exercise caution when considering such claims, however since they may in part reflect a failure to recognise relevant earlier scholarship on philanthropy.

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[4] Prominent examples include Charles Booth - who spent his own money on the research that eventually led to the creation of his famous poverty maps of London, and was supported by volunteers from within the settlement house movement – and Seebohm Rowntree, scion of the Quaker confectionery dynasty and pioneering social reformer who produced highly influential studies of poverty in York.

simply because it is not framed according to language and concepts that modern observers are familiar with. In a series of articles in which they both offer perspectives on the origins of the historical study of philanthropy, for instance, Hall (1999) takes issue with an assertion made by Stanley Katz that when he took an interest in the subject of philanthropy in the mid-1970s "very little of consequence had been written on foundations themselves or the milieu in which they worked".[5] (Katz, 1999, p.75). Hall argues that this claim does a significant disservice to the work of previous scholars who had published on philanthropy-related topics over many years; and suggests instead that "academic scholarship on charity and philanthropy began to appear as early as the 1890s" (Hall, 1999, p. 522). The challenge for the historian of philanthropy is that often this work is not framed in terms that make its relevance immediately obvious, so it is often necessary to engage with the literatures of other disciplines and potentially translate some of the language and concepts.

Over time, as the language of 'philanthropy' became more commonly applied, it is easier to identify a growing body of scholarship that can be clearly categorised as pertaining to the history of philanthropy. This scholarship was inevitably in part a reflection of the particular priorities and concerns of its time: in the 1930s and 1940s, for instance, against a backdrop in which the challenges posed by the Great Depression in the US and the rise of Keynesian economics in the UK were giving rise to wider debates about wealth inequality and state provision, a substantial proportion of the philanthropy-related scholarship produced had a particular focus

[5] Katz refers specifically to foundations, but it is clear from the context in the paper that his reference to "the milieu in which they worked" includes the wider landscape of philanthropy, so his claim applies more broadly.

on the nature of voluntarism and charitable associations, and the role they can and should play in meeting the needs of society.[6] And there were again important external factors at play in the 1950s and 1960s which led to concerted efforts to coordinate research into the history of philanthropy (and in particular the history of philanthropic foundations) for the first time, and to the idea that this could form the basis of a distinct and coherent field of study. Chief among these factors was an increasingly hostile political climate of Cold War paranoia, in which many foundations found themselves accused of acting against America's best interests; crystallised in two Congressional committees – the Cox and Reese commissions – which were spearheaded by anti-communist US Senators to investigate allegations that foundations were pushing a socialist agenda, and both of which delivered highly critical verdicts. Huehls (2013, pp. 1-2) argues that "If there was a single trigger for this wave of interest in studying philanthropy, it was the climate for foundations created by the Cox and Reese Commissions between 1952 and 1955" because "in the aftermath of these investigations, the call for educating the public—and Congress—about the history of foundations and their role in American life was voiced by both the Ford and Russell Sage Foundations." And it is certainly true that the Ford and Russell Sage foundations went on to be two of the main funders of the new flowering of academic interest in the history of philanthropy during the 1950s and 1960s.

As ever when searching for causal explanations of historical events, there are important individual-level factors which sit alongside those at a systemic level. In the

[6] This resulted in publications that were not primarily historical in nature, but contained important elements of historical perspective, from scholars such as Constance Braithwaite and Arthur Schlesinger (Braithwaite, 1938; Schlesinger, 1944).

case of the emergence of history of philanthropy as a field of study in the 1950s and 1960s, a handful of key individuals appear to have played a critical role: in particular F. Emerson Andrews, a Russell Sage Foundation executive with a strong existing personal interest in the history of philanthropy who was the driving force behind a 'Conference on the History of Philanthropy' hosted in 1956 at Princeton University, with the aim of discussing the shortage of historical research on philanthropy and exploring the potential for a shared research agenda that could help to develop this field of study further. (Curti, 1957; Hall, 1999). Emerson brought Merle Curti – a Pulitzer Prize-winning historian of American thought - on board to help convene the conference, and Curti subsequently went on to take a keen interest in philanthropy and publish widely on the subject. (Karl, 1997; Huehls, 2013). The Princeton conference proved to be a crucial turning point in the scholarly study of the history of philanthropy, because it helped to shape a research agenda and - perhaps even more importantly - because the Ford and Russell Sage foundations committed to that agenda and proved willing to fund academic work that might further it, thus providing an incentive for academic historians to turn their attention to these topics. (Hall, 1999). As a result, the 1950s and 1960s "produced an outpouring of seminal studies" (Hall, 1999, p. 524) , including publications taking a broad view of the history of philanthropy in America (Andrews, 1950; Marts, 1953; Curti, 1958, 1961 & 1963; Bremner, 1960) as well those focussing on specific aspects of this history; such as the role of philanthropic foundations (Andrews, 1956; Weaver, 1967), philanthropy's role in shaping higher education (Curti & Nash, 1965), and the history of fundraising (Cutlip, 1965).

Whilst the desire to shore up the legitimacy of philanthropy (and particularly philanthropic foundations) by studying its historical context was driven by concerns that were particular to the US context, it ended up having a significant knock-on effect on scholarship the history of philanthropy in England as well. It was clearly felt that the story of philanthropy in America could only be told properly with reference to its historical roots in the country from which the original settlers of the US founding myth had come, so research on philanthropy in England was seen as an important part of the mix.[7] This resulted, most notably, in two seminal publications: W.K. Jordan's *Philanthropy in England 1480-1660* and David Owen's *English Philanthropy 1660-1960*. Between them, these books, offered a broad narrative sweep of the development of philanthropy in England from the Reformation to the 20th century, which although since contested on a number of fronts, has continued to influence understanding of the history of UK philanthropy (Vallely, 2020).

From the 1960s onwards the body of literature relevant to the history of philanthropy in the UK grew substantially, in part due to the direct influence of Jordan and Owen's work; but also, as noted by Alan Kidd, as a result of the wider growth of the 'social history paradigm' (Kidd, 1996). Within this literature are works exploring a wide range of different thematic angles; including the role of women (Prochaska, 1980), the development of the legal framework for charities and charitable trusts (Jones, 1969; Chesterman, 1979), the relationship between state and voluntary action (Finlayson,

[7] It is perhaps because of this emphasis on fitting with the received narrative about the founding of the US that the focus of these studies was on England, with little or no consideration given to the development of philanthropy in the other nations of the United Kingdom.

1990)), the relationship between philanthropy and healthcare (Prochaska, 1992; Gosling, 2017), and the reputation of philanthropy (Cunningham, 2020)). Other works focus on the history of philanthropy in specific geographic locations: e.g. London (Andrew, 1989), Manchester (Shapely, 2000), Scotland (Checkland, 1980), Liverpool (Simey, 1992), Cardiff (Evans, 1982) and Bristol (Gorsky, 1999). There have also been a small number of books aimed at a more general readership which attempt to convey the broader sweep of the historical development of UK philanthropy in the same way that Kirkman Gray, Jordan and Owen did (e.g. Nightingale,1973; Whitaker, 1974; Prochaska 1988; Davies, 2015; Vallely, 2020).

It should be noted at this point that there remains something of a lacuna in the literature on the history of UK philanthropy when it comes to the 20th century, particularly in terms of secondary survey sources which attempt to offer a broad view of how philanthropy has evolved in this country post-1945. This is reflected in the works in this PhD portfolio, where the majority of examples pertaining to the UK are from the 19th century or earlier, in large part because this is where existing secondary literature on UK philanthropy tends to focus, and since these sources have often acted as the starting point for the further research underpinning this portfolio, their limitations have to some extent been replicated. In other published works not contained in this portfolio, the author has endeavoured to explore examples from the 20th century history of philanthropy – including that of the UK – and applied the same approach and methodologies used in these portfolio works to identify potentially relevant insights for current practitioners. (E.g. Davies 2019, 2021a, 2021b, 2022a, 2022b, 2023a, 2023b, 2024).

Returning to our consideration of the development of the academic study of philanthropy, the other important aspect is the emergence of Nonprofit Studies and Voluntary Sector Studies as distinct academic fields in the US and UK respectively in the 1970s, followed by the emergence of Philanthropic Studies in the US in the 1980s. This raised new questions about where the history of philanthropy should sit: should it be seen as a subfield of these new fields, or as a narrow thematic subfield within history (as it had been up to that point)? External factors once again played a part in these developments: in the US, for instance, the creation of Nonprofit Studies was partly driven by the impact of the 1969 Tax Act (which had introduced new distinctions between foundations and operating charities that were to reshape the US nonprofit landscape), as well as by ongoing scrutiny of the role of philanthropy (particularly in the form of the independent Filer and Peterson Commissions). (Simon, 1995; Brilliant, 2000). In the case of the development of Voluntary Sector Studies in the UK, an important early factor was the “rediscovery of poverty” by social scientists in the 1960s, which highlighted the limitations of welfare state provision and the ongoing challenges facing the poorest in society and raised questions about the role of voluntary provision and philanthropy as part of the solution. (Lansley, 2021) These questions became ever more pertinent (and more politicised) in the 1980s and early 1990s, as successive Conservative governments sought to make use of the voluntary sector in their efforts to cut back public spending and reduce the size of the state. (Harris, 2016).

Despite facing many of the same challenges as any interdisciplinary area of research seeking to establish itself as a new academic field,[8] Nonprofit Studies, Voluntary Sector Studies and Philanthropic Studies all grew and spread internationally over the following half century; suggesting that they were all raising questions and bringing to light ideas that resonated well beyond each field's origins within its own specific country context. A 2007 survey of the state of Nonprofit and Philanthropic Studies globally found that there were, at that point, 240 universities in the US offering courses in Nonprofit Management Education, and 189 universities outside the US doing likewise. (Mirabella et al, 2007). There has also been an increase in the number of Nonprofit and Philanthropic Studies research networks[9] and the number of dedicated journals over the last 50 years.[10] (Smith, 2013). Recent studies which have used network analysis to map these developments, and to assess whether they offer sufficient grounds for considering Nonprofit and Philanthropic Studies to be a distinct and coherent field of knowledge and research, have concluded that they do. (Ma & Konrath, 2018; Ma & Bekkers, 2024).

Within the overall global growth of Nonprofit Studies as a field there may, however, be something of a disparity when it comes to Philanthropic Studies as a subfield.

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[8] Hambrick and Chen (2008) identify the three most important challenges for any proposed new academic filed as the need for the proposed field to differentiate itself from adjacent fields; the need to mobilize resources; and the need to legitimize the proposed field within higher education.

[9] e.g. The Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) - originally founded as the Association for Voluntary Action Scholars (AVAS) in 1971, which launched the journal Nonprofit and Voluntary Sector Quarterly (NVSQ) in 1972; The International Society for Third Sector Research (ISTR), formed in 1992, which publishes the journal Voluntas (originally launched in 1990); The Voluntary Sector Studies Network (VSSN), formed in 1996, which has published the Journal Voluntary Sector Review since 2010; and the European Research Network on Philanthropy (ERNOP), formed in 2008.

Mirabella et al (2007, p. 125) note that in their survey: “The main European feature is asymmetry between the large number of programs in NPOs and the very limited number of programs in philanthropy”, and they further suggest that, “this divide is not just a matter of educational policies but is deeply rooted in the differentiated theoretical patterns that characterized European traditions in the framework of civil society”. Subsequent studies offer a slightly more positive picture: Carrington (2009, p3), for instance, identifies “115 university based centres in Europe that provide some form of research/teaching that could be relevant to the philanthropic sector”, and “specialist ‘standalone’ philanthropy research centres [which] have become well established and of high academic reputation within at least six European universities” (Carrington, 2009, p.18. Keidan et al (2014, p.17), meanwhile, was able to identify “24 Higher Education institutions offering some philanthropy education provision, including 20 unique course modules and 16 professional training courses”, in addition to “eight dedicated academic centres of philanthropy”, and “two academic chairs in philanthropy”. It seems reasonable to conclude, then, that both Nonprofit Studies and Philanthropic Studies are now established as fields globally; but that when it comes to the position and status of the latter, the UK and Europe are still some way behind the US.

What, then, is the particular status of the history of philanthropy as an area of study and teaching within this context? Davis-Smith (2022, p. 390) argues that “history has been slow to force its way onto the curriculum” of philanthropic and nonprofit studies courses; whilst acknowledging that there may be signs this is changing. An increasing number of courses do now include entire modules or at least sections of

modules which explore the history of philanthropy. There are also a handful of networks for scholars with a specific interest in the history of philanthropy and the nonprofit sector,[11] and relevant issues are regularly covered in other academic networks which are not directly focussed on philanthropy, but on areas where there is clear overlap.[12] Two things are clear, however, from surveying the current landscape for the history of philanthropy: firstly, that history remains a relatively small part of the overall field of nonprofit and philanthropic studies; and secondly, that the majority of historical research that is relevant to philanthropy is still done by scholars working within the discipline of history – who may engage with nonprofit and philanthropic studies on a temporary basis insofar as it is relevant to their work, but are unlikely to see themselves as part of this field or to categorise their work in that way. This is understandable: the structuring of academic departments and job roles within higher education, and the incentives and rewards for research and publication, generally tend to push people towards working in recognised and well-established fields, and publishing in journals within those fields. Newer fields, especially those that are interdisciplinary, face a continual uphill struggle to prove their legitimacy by attracting scholars and generating a high-quality corpus of literature. And even when historical scholars do want to engage with nonprofit studies, philanthropy studies or voluntary sector studies, they may face barriers if journals or conferences in those fields are reluctant to engage with historically-

[11] The Voluntary Action History Society was formed in the UK in 1991 and holds regular seminars, as well as a larger conference every two years. In 2015 the HistPhil website was launched in the US, providing a platform for scholars from a range of backgrounds to share short articles about books or articles they have published which have relevance to the history of philanthropy, or to offer historical perspective on current issues.

[12] E.g. The Urban History Group or the Business History Conference,

focussed research (perhaps due to a preference for research that has clearer relevance to current issues and practice). It is crucial that any such barriers to outside scholars are identified and removed wherever possible, because the opportunity cost to the fields of Nonprofit and Philanthropic Studies could be significant. As Hall (1999, p. 528) argues:

> *"The rapidly growing body of civic engagement and civil society scholarship reminds us* [that] *some of the most illuminating and insightful perspectives on nonprofits and voluntary action have come from scholars whose primary interests lie elsewhere."*

For those who are interested in closing the gap between academia and practice when it comes to the history of philanthropy, there are several key challenges. One is that there is still more to be done to make the case for the value of historical knowledge and insight, both to scholars within the fields of nonprofit and philanthropic studies and to practitioners working in philanthropic or nonprofit organisations. Linked to this, a more active process of connection, translation and dissemination may be required, since historians who are working on issues of relevance to philanthropy may have limited connections to practitioners and fewer incentives to communicate their work to this audience. It is also important to think about the *types of histories* that are being produced: histories focussed in a highly targeted way on one time period, on a narrow theme, or on an individual event are certainly valuable, but it may be harder for non-specialists to appreciate their relevance to current practice or debates; hence broader thematic histories written with this aim in mind are important too. In a series of essays in 2003 evaluating the legacy of Robert Bremner's 1960 book *American Philanthropy* the authors disagreed about the lasting merits of

the book, but they all agreed that its continued influence was testimony to the fact that broad, accessible historical accounts of the history of philanthropy remain few and far between. Friedman (2003, p. 447), for instance, argues that "the general reader and scholars in other fields of philanthropy still do not get the well-integrated narrative that a single or coauthored history could provide… we still lack a good Bremner-like accessible, streamlined narrative that is crafted with literary skill and human interest", whilst Hammack (2003, p. 449) issues a call to modern historians of philanthropy to "emulate Bremner's ability to define a significant and manageable research field, engage the intelligent general reader, suggest useful lessons, and reinforce positive action." The kind of accessible narrative history that Bremner produced is clearly not sufficient by itself, and nor should it be seen as a replacement for more targeted and in-depth explorations of particular aspects of the history of philanthropy, but it is potentially an important element of bringing the topic to a wider audience of practitioners and the general public, so its value and importance should not be discounted.

6. THE PURPOSE AND VALUE OF HISTORY FOR PRACTITIONERS, POLICYMAKERS & PUBLIC

There are specific arguments to be made about the importance of historical research and perspective in philanthropy, but it is also important to recognise that these

arguments are situated within wider debates about the purpose and the value of history which have a long tradition and a rich literature, and can therefore offer important insights when it comes to understanding the potential value of historical knowledge and historical thinking for practitioners within the field of philanthropy.

History was, for a long time, seen primarily as a literary form; then in 19th century Germany a major shift took place which saw the idea of history as a "science" emerge, alongside more systematic efforts to address questions about the nature and purpose of history. Writers like von Humboldt and Hegel offered important early views (von Humboldt, 1967; Hegel, 1894), which were subsequently developed and challenged by others – most notably Leopold von Ranke, whose development of the discipline of historiography, as well as of scholarly methods of research and teaching within history led to him becoming seen as "probably the most important historian to shape historical profession in Europe and the United States in the late 19th century" (Hoefferle, 2011, p.68). Ranke's views on the nature of historical inquiry - encapsulated in his famous and oft-quoted remark that the job of the historian is "merely [to] tell how it really was" - proved to be highly influential in framing one of the central questions that has occupied theorists of history ever since: namely whether the goal of history is best understood as the attempt to uncover and convey facts about an objective past reality, or whether historical research should instead be seen as an inherently subjective activity, which unavoidably reflects the views and values of the historian and the time period they are writing in?

At first Ranke's ideas about the objective and scientific nature of historical enquiry were broadly accepted, but over the course of the first half of the 20th century a new

generation of writers and thinkers came to question this view of history. Scholars including Walter Benjamin, R.G. Collingwood and W. H. Walsh made important contributions to challenging Ranke's empiricist conception of history (Benjamin, 2020; Collingwood, 1946; Walsh, 1951), but it was the publication of E.H. Carr's *What Is History?* in 1961 that brought these critical arguments to a much wider audience (Carr, 1961).[13] Carr also rejected Ranke's claims about the purely objective and scientific nature of history, although he stopped short of joining Collingwood in embracing the conclusion that history must therefore be entirely subjective. Instead, Carr argued that whilst history must always be understood in terms of the relationship between historians and the past that they study (a relationship which is ongoing and ever-evolving), there was still the possibility of objective facts (albeit the historian always has choices about which of those facts to use and how).

The questions that Carr concerned himself with continue to exert a strong hold over historians today, as evidenced by the regular revisitation of his work in conferences and essay collections with deliberately referential titles.[14] Some historians take issue with Carr's acceptance of subjectivity, and argue (to varying extents) for a return to Rankean ideals of objectivity for historical facts (Marwick, 2001; Evans, 2018). In part, of course, this may be less about Carr's work and more about antipathy towards the later rise of post-modernist theories which have gone much further in contending that history is nothing more than a series of subjective narratives created by

[13] As well as the broadcast by the BBC earlier that year of the original Trevelyan Lectures on which the book was based.
[14] E.g. "What is History Now?" (Cannadine, 2002) and "What is History, Now?" (Carr & Lipscomb, 2021).

historians, and that there is no single objective measure of “truth” against which they can be judged. Post-modernist historians themselves, meanwhile, are often critical of Carr from the opposite direction; arguing that he did not go far enough in accepting the implications of subjectivity and that any claims about the ‘radicalism’ of his ideas are thus unwarranted. (Jenkins, 2000; Munslow, 2001).

Alongside this debate about the fundamental nature of history, there has been ongoing interest in more practical questions about its uses. Scholars have explored the value that historical insights and methods of historical inquiry can bring across a range of contexts, and the risks associated with their misuse. (Wood, 2009; MacMillan, 2010, Jordanova, 2019). Starting in the 1970s, the idea that there is a unique mode of ‘thinking historically’ also began to emerge. This was developed by philosophers of history and theorists of history education in the UK, US and Germany in the 1970s, who sought to challenge the notion that thinking historically amounts to mere mastery of historical facts (i.e. “knowing that”), and instead emphasise the importance and value of the unique tools and approaches that the historian must learn (i.e. “knowing how”). (Wineburg, 2021; Lévesque & Clark, 2018). A number of scholars have made attempts to define the characteristics of historical thinking. The groundwork was laid by Wineburg (1991) who identified three key cognitive processes described as ‘unnatural’ but crucial to historical thinking, based on research into how historians differ from high school students when reading historical sources: namely sourcing, contextualization and corroboration. Along similar lines Seixas (2017) subsequently developed an influential framework of ‘six core concepts of historical thinking’, including: historical significance, evidence, continuity and

change, cause and consequence, historical perspectives, and the ethical dimension. The idea that the development of historical thinking is a fundamental part of the value of history education in schools and at universities has gained significant traction over the last 50 years, although it has also attracted criticism. (Gibson et al, 2025). Some, for instance, question whether it is possible to specify a single mode of historical thinking that genuinely reflects the diverse and sometimes conflicting approaches taken by academic historians; not to mention by non-historians who might endeavour to take a historical approach with respect to certain elements of their work (Levisohn, 2017). Others, meanwhile, argue that current approaches to historical thinking centre on hegemonic assumptions about Western disciplinary norms and epistemologies, and thus marginalize and downplay other forms of historical understanding based in indigenous knowledge systems. (McGregor, 2017).

It is currently difficult to find much explicit consideration of the value that historical perspective on the practice of philanthropy might have for those working in the field (as opposed, for instance, to examples of individual funders or charities engaging with their own histories, of which there are plenty). The only real exceptions are an introductory blog for the aforementioned HistPhil website outlining its rationale (Soskis & Morey, 2015), and two journal articles offering a more in-depth exploration of the benefits of historicising non-profit studies courses – one from a UK perspective (Davis-Smith, 2020) and the other from a US perspective (Weber & Witkowski, 2025). There are, however, other sources focussed on the question of the value of history in closely related fields of practice such as humanitarian work (Borton & Davey, 2015; Taithe & Borton, 2015; Borton, 2016) and international development (Woolcock,

Szretzer & Rao, 2011). There is also a well-developed broader literature on the importance and value of history to policymaking (Neustadt & May, 1986; Thane, 2009; Haddon et al, 2015; Berridge, 2018). From this wider literature on the theoretical value of history, as well as from practical examples of public history projects (such as History and Policy),[15] there are many insights that can be translated to the context of philanthropy. This supporting statement is not the place to attempt a comprehensive account or analysis of these insights, but it will be useful to consider in brief some of the main ways that historical knowledge and historical research methods can bring value to philanthropy practitioners.

Celebration & commemoration: The most common and straightforward way in which historical information is used in the sphere of philanthropy is for the purposes of celebrating or commemorating an organisation, individual or event. Many charities, for instance, choose to recognise important milestones in their history, such as centenaries, and often do so by collecting and sharing information about their own founding and development. (e.g. RNLI, 2024; RSPCA, 2024). There are those who are critical of using history in this way: some practitioners, for instance, argue that spending charitable funds on researching and communicating this kind of history is self-indulgent and has little demonstrable practical value. (Saxton, 2012; Oldham, 2022). On the other hand, those who defend the use of history point out that whilst celebration and commemoration in isolation may not be that useful, if it is done as

[15] History and Policy (www.historyandpolicy.org) is a website and academic network created by the UK's Institute of Historical Research in 2001, which aims to create links between historians, policymakers and journalists and to offer opportunities for sharing historical research and insights that are of relevance to current policy issues.

part of an organisation's wider efforts to understand its own history it can help to provide a valuable sense of continuity with the past, and strengthen the sense of shared purpose and identity of employees and other stakeholders (such as supporters, in the case of charitable organisations). (Seaman Jr & Smith, 2012).

Institutional Memory & Contextualising Wealth: Philanthropic funders or nonprofit organisations may also undertake explorations of their own history that are not for external purposes of commemoration or celebration, but rather for internal purposes of bolster institutional memory and informing strategy. In some cases, this may be driven by specific pre-existing concerns about potentially problematic elements of an organisation's history. A range of organisations have, for instance, commissioned research in recent years to identify their historical links to the proceeds of slavery and colonialism – including, in the UK, the National Trust (Huxtable et al, 2020), The Corra Foundation (Mullen, 2023) and the various charitable trusts bearing the name of Joseph Rowntree (Rowntree Society, 2021). These efforts were given further impetus by the intensified focus on issues of racial justice following the Black Lives Matter protests. In the UK, in particular, the defining image of those protests was that of a statue of the philanthropist and slave trader Edward Colston (who had long been a contentious figure (Jordan, 1999)) being thrown into Bristol Harbour, so questions about the links between wealth accrued through the proceeds of slavery and the legitimacy of present-day philanthropy seemed particularly pertinent.

The end result of undergoing a process of historical self-reflection varies across organisations: for some it is enough to acknowledge the past; others may focus on

practical actions such as renaming buildings or removing statues; whilst some may feel that it is necessary to take more radical steps to redesign their entire approach around the idea of making reparation for past harms.[16] These are often difficult decisions, requiring a nuanced and sophisticated understanding of history. They have become more challenging and risk-laden in recent years, as the political context has shifted and public debate about how we should deal with the legacy of slavery and other past injustices has become more polarised.

***Understanding the context for particular issues*:** Nonprofit organisations and philanthropic funders are, of course, not just interested in their own histories, but in the wider historical context for their work. In part this is about insights into the nature, role and practice of philanthropy (which we consider further below), but it is also about understanding the history of the issues and causes they focus on, and the history of the policies and structures that have been developed to address them. Medical charities in the UK, for instance, will benefit from understanding the historical development of the NHS; while organisations focussed on combatting biodiversity loss, for example, may need to be aware of the longer-term development of land use and farming policies.

***Learning from successes and failures**:* In some cases, it may be possible to learn directly from the successes and failures of the past. This may be about learning what

[16] E.g. The King's Fund issued a statement on its links to colonialism and slavery in 2022 (King's Fund, 2022), the Sir John Cass's Foundation changed its name to the Portal Trust in 2021 following the findings of historical research it had commissioned into its founder's connections to the slave trade (Ogborn, 2021), and the Joseph Rowntree Trust announced in 2025 that it was recruiting a new Head of Reparations as part of its efforts to address historic racial exploitation uncovered through historical research (Preston, 2025).

to do: in terms of finding approaches to fundraising, giving and organising that we have forgotten & can take elements from or reinvent to use in a modern context. Organisations like the Salvation Army, for instance, demonstrated an approach to branding and marketing in the late 19th century that outpaced much of the commercial sector at the time – including the development of ethical consumer products such as their "Lights In Darkest England" safety matches – which might have useful lessons for charities today in terms of their own approach to commercial innovation (Roddy, Strange & Taithe, 2018).

Conversely, learning from the past may be more about what not to do. One clear benefit of hindsight is that it provides us with the perspective to see unintended negative consequences play out, which can hopefully help us to avoid making similar mistakes in the present. An example might be the history of "voting charities" in Victorian England. These were charitable institutions which allowed their supporters to exercise direct say over who the beneficiaries of donations would be and were in part motivated by a desire to overcome the perceived anti-democratic nature of expert intermediaries, and return to a 'truer' form of charity by putting donor and recipient back in close contact. (Kanazawa, 1999; Alvey, 1991). However, the voting was done through raucous and degrading events - which Sir Charles Trevelyan lamented to *the Times* in 1874 managed to combine "the excitements of the racecourse and the Stock Exchange, with some of the worst practices of the old electioneering system" (quoted in Alvey, 1991, p. 149). There were also many perverse incentives at play when it came to selecting recipients, which led Florence Nightingale to criticise voting charities as "the best system for electing the least

eligible" (quoted in Kanazawa, 1999, p. 375). As digital giving and crowdfunding platforms drive a process of disintermediation within philanthropy, which is seeing people increasingly being able to give to other individuals rather than to organisations, there are concerns about the dangers of human bias (both implicit and explicit) when it comes to choosing recipients. (Kenworthy, 2024). There is already clear evidence, for instance, that in medical crowdfunding donors exhibit a bias towards recipients from the same racial group as them, or that recipients with stronger existing networks on social media are more likely to be successful. (Cai et al, 2025). The history of Victorian voting charities may provide useful context about how concerns about allowing donors direct choice over recipient have emerged and been dealt with before.

It is, of course, important not to draw simplistic conclusions from historical examples or to exaggerate claims about their relevance to the present day, since there are almost always contextual factors to be taken into account which complicate the picture and make it clear that there are many dissimilarities as well as apparent similarities. It is possible, however, to approach things in a more sophisticated way: a good example being the series of historical case studies commissioned by the Open Philanthropy Project. (Open Philanthropy, 2025). These are case studies written by historians, focussed on exploring and assessing the role played by philanthropy in examples of legislative and policy change that led to notable social progress, which manage to take into account contextual complexity whilst still drawing out potential insights and lessons for current practitioners and policymakers.

***Assessing claims of novelty*:** Philanthropy, like many fields of practice, is prone to a certain degree of neophilia: a tendency to proclaim approaches or trends to be 'new' or 'unprecedented'. One benefit of historical perspective is that it can help to temper this tendency by allowing us to identify where seemingly "new" phenomena have antecedents of one kind or another (and often the history of these antecedents is in itself very interesting). Conversely, when no apparent antecedents can be found for a given example, this can lend weight to claims of genuine novelty.

***Identifying long-term trends and cyclical themes*:** It is often possible to find more than one historical example with relevance to current practice in philanthropy (and in some cases examples from multiple different time periods). This suggests that these examples are not merely isolated precedents, but rather reflections of deeper long-term trends and cyclical themes that occur time and again throughout the history of philanthropy. Identifying these themes and understanding how and why they have been prevalent at different times can provide value perspective on current debates, as it makes it easier to determine the elements of them that are context-specific and those that are more universal in nature. It is also useful to consider how these themes were dealt with in contemporary political and cultural discourse; both because this can offer insights on arguments in favour of or against certain ideas about the nature and role of philanthropy, and also because it provides a valuable reminder that whilst we might have a tendency to view these ideas "niche", they have at times been central to debates about the very nature of society.

For example, the question of what to do with "tainted donations" – i.e. those that come from ethically or morally dubious sources - is one that has come to the fore in

recent years in light of controversies over the donations of the Sackler family and the disgraced financier Jeffrey Epstein, as well as concerns over the historical links of various sources of philanthropic wealth to the slave trade. (Radden Keefe, 2022; Illingworth, 2022). But it is very far from a new concern: as far back as the 8th century the Council of Clovesho was discussing what to do about wealthy people who gave generously to the poor but did so from "goods unjustly plundered or otherwise extracted through force or cruelty". (Ryan, 2016, p.95). More recently, the question of what charities should do with tainted donations was a constant source of debate in the late 19th and early 20th centuries. The founder of the Salvation Army, William Booth famously (but possibly apocryphally) said "The only problem with tainted money is t'aint enough of it…", while George Bernard Shaw centred his play Major Barbara around the ethical dilemmas presented for his title character by a donation to the Salvation Army from her estranged arms manufacturer father. (Bremner, 1996; Breeze, 2017). In the US, meanwhile, the issue came to widespread public and political attention as a result of a donation of $100,000 from John D Rockefeller to the American Board for Foreign Missions, which attracted widespread condemnation from those who criticised Rockefeller's business practices as predatory and monopolistic. (Soskis, 2014).

History as a lens for other perspectives: As highlighted at the start of this essay, the nature of philanthropy - as both an individual phenomenon at the micro level and a societal artefact at the macro level – means that it lends itself to analysis from a wide range of different perspectives (sociological, political, economic, anthropological, philosophical etc). This makes philanthropy deep and rewarding as a subject of study,

but also presents challenges in terms of building a coherent field of Philanthropic Studies, since its inherently cross-disciplinary nature means that it does not always fit neatly within the current structures of academia. Historical perspective can prove useful here, as it provides a framework through which insights from other fields of knowledge can be brought to bear in a coherent (and sometimes more accessible) way.

***Countering the weaponisation of history*:** The study of history is often bound up with politics. Claims about the past reflect the views and biases of the historian and the time in which they are writing, and in many cases are made with the explicit intention of making a point about the present (Carr, 1961; Wood, 2009). Added to this, there is a long tradition of invoking history in political rhetoric as a way of claiming legitimacy for certain ideas or arguing against others (Hobsbawm & Ranger, 1983; Kammen 2008; Verovšek 2016). In the increasingly polarised political climate of recent years this has intensified, so that our knowledge and understanding of history has become acutely contested.

Against this backdrop, there is an is an important defensive aspect to the value of cultivating historical knowledge and perspective for practitioners: namely that it will make them better equipped to counter any efforts to use history in attacks on organisations they work for or support. Charities like the National Trust, for instance, have found themselves drawn into 'culture war' debates over their efforts to uncover and confront problematic elements of their own organisational history and the history of properties they own. Critics, including media commentators and politicians, have argued that the National Trust's interpretation of Britain's legacy of slavery,

colonialism and empire is biased and incorrect and accuse them of "rewriting history" as part of a "woke agenda". (Heffer, 2020). Some of these critics also invoke history to argue that the National Trust's work in this area goes against its own history and charitable mission, in order to bring into question the legitimacy of the organisation's current approach. (Hope, 2020). In the face of these attacks, it has been vital for the National Trust as an organisation to have confidence in its own knowledge and understanding of its own history, and the wider historical context within which its work takes place, which is why it has worked with historians such as Professor Corinne Fowler to uncover this history in a systematic and rigorous way (Adams, 2024).

History and futures thinking: Thinking in a historical way can bring value not only to our understanding of the present, but also to how we think about the future. The idea of thinking about the future in a systematic way took hold during the Cold War, with the development of new disciplines of Futures Thinking and Strategic Foresight, and has subsequently become widespread across governments, public bodies and companies. (Schropp, 2023). From early on, it was recognised that historians might have a valuable perspective to add to futures thinking and foresight work. As Briggs (1978, p. 445) notes:

> *"Historians had to come to terms with the fact that there is no 'absolute' past, long before forecasters were pondering the benefits of the 'absolute' future. They have also had to come to terms with their style of presentation, their personal biases, and the fact that they are grounded in the present and are therefore influenced by present preoccupations. Historians and futures researchers have much in common."*

Subsequent scholars have developed these ideas further and explored in more depth the unique value of historical methods and modes of thinking when it comes to efforts to think rigorously about the future. (E.g. Staley, 2002, 2007; Green, 2012; Voros 2017; Bel, 2026).

Futures thinking and strategic foresight have so far not been widely adopted across the world of philanthropy, although that may be changing.[17] There is little evidence yet of historical approaches being brought to bear on futures work in philanthropy, but arguably this is a field in which it might have particular value. A key aspect of thinking in a historical way is developing an appreciation of contingency and counterfactuals (i.e. that events in the past were not fixed or predetermined at the time, and could have gone differently), and applying similar thinking when it comes to looking forward can help us to broaden the domain of possible futures we are willing to consider (Staley, 2002, 2007; Bel, 2026). For organisations in civil society which aim to look beyond dealing with issues within existing systems and structures, and instead to imagine radically different ways of doing things, this kind of broadening of horizons is vital.

[17] The membership body for European philanthropy organisations, Philea, for instance, launched a project on "Futures Philanthropy" in 2024 in partnership with a group of foundations and has subsequently announced a "Futures School" to teach philanthropy professionals how to use futures tools in their work. (Philea, 2025)

7. PORTFOLIO

7.1 Description & Contextualisation

The portfolio submitted as the basis for this PhD by Published Works is comprised of five separate works. All were solely authored by the candidate; all have been published either in print or digitally; and all remain available within the public domain.

WORK 1: Davies, R. (2015) 'Criticisms of Philanthropy', chapter 5 in *Public Good by Private Means: How Philanthropy Shapes Britain*. Alliance Publishing Trust. Kent Academic Repository ID: **https://kar.kent.ac.uk/112268/**

The penultimate chapter of a book exploring the history of philanthropy in the UK, and the lessons for current philanthropy practitioners and public policymakers. This chapter identifies recurrent critical themes that can be found throughout the history of philanthropy, and how they are reflected in current debates.

WORK 2: Davies, R. (2023) *What is Philanthropy For?* Bristol University Press. Kent Academic Repository ID: **https://kar.kent.ac.uk/112267/**

The full text of a book commissioned by Bristol University Press as one of the first titles in its "What is it for?" series, which aim to provide accessible, historically-informed introductions to a range of important topics in society today, and where debates about them might go in the future. This book considers how philanthropy has been defined over time in relation to a range of potential alternatives (charity, the state, justice, democracy, the market), what this can tell us about the nature and role

of philanthropy, and how it can inform our thinking about where philanthropy should go in the future.

WORK 3:

-Davies, R. (2024a) *The History of Philanthropy*. Available at: https://blogs.kent.ac.uk/specialcollections/2024/07/19/the-history-of-philanthropy/. (Accessed 5 December 2025). Kent Academic Repository ID: **https://kar.kent.ac.uk/112269/**

- Davies, R. (2024b) *Satire and Philanthropy*. Available at: https://blogs.kent.ac.uk/specialcollections/2024/07/19/satire-and-philanthropy/. (Accessed 5 December 2025). **Kent Academic Repository ID: https://kar.kent.ac.uk/112270/**

- Davies, R. (2024c) The History of Fundraising. Available at: https://blogs.kent.ac.uk/specialcollections/2024/07/22/history-of-fundraising/. (Accessed 5 December 2025). Kent Academic Repository ID: **https://kar.kent.ac.uk/112271/**

A series of three blogs based on the text of panels produced for the 'Exploring Philanthropy' exhibition, originally staged in the Templeman Gallery at the University of Kent Library between May and October 2022 and subsequently recreated as an online exhibition.[18] The first blog offers a concise outline of the historical development of philanthropy in the UK, the second explores the ways in which

[18] https://www.kent.ac.uk/library/special-collections/our-exhibitions/exploring-philanthropy

philanthropy has been dealt with as a subject of satire, and the third considers the history of fundraising.

WORK 4: Davies, R. (2024d) "Good Intent, Or Just Good Content? Assessing MrBeast's Philanthropy". *Journal of Philanthropy & Marketing.* Volume29, Issue2, May 2024. Available at: https://doi.org/10.1002/nvsm.1858. Kent Academic Repository ID: **https://kar.kent.ac.uk/105768**

A paper published in a special "dialogues" edition of the Journal of Philanthropy and Marketing, exploring the philanthropy of the hugely successful YouTuber MrBeast. This paper was commissioned as a "pillar article" to form the centrepiece of the edition, with responses from other scholars published alongside it. The paper itself attempts to place MrBeast's approach in the context of wider historical and current debates about the nature and role of philanthropy, in order to ascertain what (if anything) is genuinely novel about it, and how we should understand it in relation to models of philanthropy that have gone before. The paper considers "Beast Philanthropy" through a range of lenses − aesthetic, ethical, economic and political − and what these can tell us about the key questions we should be asking and whether, on balance, we should view this phenomenon positively or not.

WORK 5: Davies, R. (2024e) "Guided Choices: The ethics of using algorithmic systems to shape philanthropic decision-making", Chapter 27 in Ugazio, G. & Maricic, M. (eds.) *The Routledge Handbook of Artificial Intelligence and Philanthropy*. Routledge, pp 451-470. Available at: https://www.taylorfrancis.com/chapters/oa-

edit/10.4324/9781003468615-32/guided-choices-rhodri-davies. (Accessed 5 December 2025). Kent Academic Repository ID: **https://kar.kent.ac.uk/112272/**.

A paper published as a chapter of the *Routledge Handbook of Artificial Intelligence and Philanthropy*. It explores the ways in which artificial intelligence (AI) could be used to shape individual choices, how these apply to different contexts in which decisions about philanthropic giving are made, and the ethical questions this might raise. The analysis draws on knowledge of relevant historical themes and precedents, alongside insights regarding current practice, in order to formulate and consider potential future scenarios; as such, it is included in this portfolio as an example of the particular value of historical perspective when it comes to thinking about the future.

7.2 Coherence & Timeliness

Whilst the publications contained in this portfolio cover a range of different topics, they form a coherent body of work bound together by a consistent core of subject matter, a distinctive approach and a common aim. The core subject matter is philanthropy; and in particular, how philanthropy and its role in society is understood and reflected in public discourse and debate. In the case of works 1 to 3 this question is addressed directly, whilst works 4 and 5 focus on specific examples of how new technologies are changing philanthropic practice, as well as how we think and speak about philanthropy. The distinctiveness of the approach taken across the publications is twofold: firstly, that historical evidence and a historical way of thinking is applied wherever possible (which, as argued above, is still far from commonplace in the field of philanthropic studies); and secondly, that the publications themselves,

whilst academically rigorous, are not specifically aimed at an audience of academics; but rather at practitioners and interested general readers. Works 1 and 2 are from books intended for a general readership, Work 3 is from an exhibition that was open to the public, and works 4 and 5 – whilst admittedly more academic in tone – are still intended to be accessible to practitioners, and are both freely available as open access publications. The common aim across the works in the portfolio, therefore, is to draw on evidence of how philanthropy has been done in the past and how it has been perceived to offer usable insights for current philanthropy practitioners and those thinking about the future of philanthropy; and in so doing, to demonstrate the value of historical perspective and historical ways of thinking when it comes to philanthropy.

The works in this portfolio are all timely in nature, both in terms of content and approach. Works 1, 2 and 3 were all created in response to existing demand among current practitioners and the wider public for knowledge and insights about philanthropy. Works 4 and 5, meanwhile attempt to shed further light on important, but under-explored, aspects of the current and potential future landscape for philanthropy. The choice to take an explicitly historically-informed approach and focus on a non-specialist audience is also timely, in that it reflects a large and growing appetite for public history in the UK.[19] However despite this clear public appetite, the

[19] As evidenced by the remarkable success of podcasts such as *The Rest is History* and *You're Dead To Me* and television programmes such as *Who Do You Think You Are?* and *A House Through Time*. (Atkinson-Phillips & Smith, 2023; The Economist, 2024). Popular history books are also big business: Nielsen BookData figures show that people in Britain and Ireland spent more on history books in 2023 than at any point since Nielsen BookData's records began in 1998, with books focusing on "specific subjects" in particular – i.e. individual stories of lives, events or movements – showing a 70% growth in sales between 2013 and 2023. (Dunn, 2025).

potential for taking a public-focussed or popular approach to the history of philanthropy (understood as a practice) remains largely untapped; with this portfolio representing part of the author's ongoing efforts to contribute towards remedying this situation.

8. CONCLUSION

This portfolio of work encompasses publications exploring a range of topics, but with a common core focus on the nature and role of philanthropy, and a shared methodological approach. As a whole, it represents a coherent and consistent attempt to demonstrate the value of both historical knowledge and a distinctively historical way of thinking for those involved in the practice of philanthropy (whether as professionals, volunteers or donors). This is situated in the context of the ongoing development of philanthropic studies as a field of study; one in which strengthening the links between academia and practice remains a key ambition. Historicising philanthropic studies further can help to achieve this ambition, by tapping into existing public appetite for historical knowledge and historical perspectives, and by showcasing tools and approaches from historical study that have clear benefits when it comes to analysing current philanthropic practices, understanding debates about the role of philanthropy, and thinking about how philanthropy might develop in the future.

8.1 Author's positionality and normative views on philanthropy

I have worked in the field of philanthropy for nearly 20 years: at first in research and policy roles within nonprofit organisations, then latterly in a mixture of academic roles and roles which sit in the space between practice and academia (often referred to as 'pracademic'). Even when working in non-academic roles within nonprofit organisations, I made a conscious effort to bring an academic approach and perspective to the work that I was doing; albeit whilst serving an audience primarily comprised of practitioners. This approach was clearly appreciated by many academics within the global philanthropic and nonprofit studies fields, and I was able to develop a strong network of contacts which resulted in me being invited to take part in a range of academic conferences and contribute to various pieces of research whilst still working as a practitioner. Since working in more deliberately pracademic roles, I have maintained a focus on trying to connect academia and practice, and have combined academic research and taking part in academic events with producing content for a more general audience and speaking at a wide range of nonprofit and philanthropy sector events.

My position within the field of philanthropy, whilst not entirely unique, remains unusual. It has given me a particular appreciation for the gaps that remain between academia and practice, as well as the opportunities that exist for creating value by closing those gaps. The position I occupy also means that I interact and work with a wide range of difference actors across philanthropy and civil society: including wealthy donors, foundation professionals, wealth advisers, fundraisers, nonprofit

leaders, civil society leaders, social justice activists and academics. Like many who work in the philanthropy field, I have myself benefitted from philanthropic support – in some cases directly, in other cases indirectly – and I consider it important to reflect on how this has shaped my views. I have been fortunate in that all the funding I have received has come with few strings attached, and I have never felt constrained in what I am able to say or the work I am able to undertake. Conversely, I feel confident that I have never allowed my own positive experiences of philanthropic funding to prevent me from engaging critically with philanthropy as a whole. However, the influence of the philanthropic support I have received on the work that I do and the approach that I take is something I continue to question, and it is important to acknowledge it in the context of this portfolio.

The fact that my work in philanthropy leads me to work alongside such a wide range of actors means that I am aware of the complex, and sometimes incommensurable, mixture of views and values which inform attitudes toward philanthropy, as well as of the practical realities against which theoretical ideals often need to be measured. In my experience one of the major challenges with discussions about philanthropy is that too often they become mired in over-simplified binaries, which contend that some aspect of philanthropy is either “good” or “bad”; or end up with those holding incommensurate normative views of philanthropy arguing at cross purposes. One of the main benefits of adopting a historical perspective, as argued in this statement and as demonstrated in the works in the accompanying portfolio, is that it can allow for a greater appreciation of complexity and nuance, and thus help to move us beyond these impasses. It is certainly true that throughout my career over the past

20 years, one of the consistent pieces of feedback I have received is that people value the balanced approach I have tried to bring to the consideration of topics; and that this value has increased as narratives and debates about philanthropy have become more polarised and divided.

It is important, however, not to confuse a willingness to embrace balance and nuance with a lack of viewpoint. Philanthropy is an inherently values-laden activity: it reflects what we think it means to be a good person, as well as our views about what constitutes the common good, so it is impossible to work in the field of philanthropy for any length of time without developing normative views about what philanthropy *should be*, even if you are willing to accept the reality of what it currently is. I certainly hold normative views about the desirable future direction of travel for philanthropy; which I hope is evident in the works contained in this portfolio and in wider outputs I have published. I try, however, to hold those views relatively lightly, as it seems to me that one of the key lessons from engaging with the history of philanthropy is that there is rarely an obvious "right answer" and that many of the questions we grapple with when considering the nature and role of philanthropy do not reflect "problems" to be "solved", but rather tensions that are inherent in the very concept of philanthropy, which we must learn to accept and manage.

I would argue that philanthropy - understood in the broad sense outlined at the start of this essay – reflects something fundamental about human nature and human societies. Whether that is the altruistic desire to help others, or the power of gift relationships to bind people together, the fact of philanthropy's existence seems to me to be an inescapable fact of what it means to be human. Of course, this still

leaves open many questions about whether the ways in which we have chosen to harness this fundamental philanthropic motive and the societal artefacts we have created around it are the right ones. In broad terms, I believe that philanthropy can be a powerful force for sustaining and improving society, but that in order to ensure this is the case we must take a critical view of the role we expect philanthropy to play and the models we use to do it. I would argue, for instance, that philanthropy is primarily a symptom of inequality rather than a tool to address it, and that if we want to ensure a more just and equal world, this will necessarily involve greater levels of taxation on wealth. I don't agree, however, with those who argue, as Bertrand Russell did that "in a just world there would be no room for 'charity'" (Russell, 1932, p.129). It is certainly true that in a world where we have met the demands of justice through taxation there might be far less philanthropy (and it might take radically different forms), but I would contend that there will always remain needs to be met, and desires to be fulfilled, that exist beyond the ambit of the state, as well as people who want to use their private assets (whether monetary or otherwise) for public good, so philanthropy in some guise will continue to exist.

When it comes the question of what philanthropy should look like, I adhere to a largely pluralist conception, in which philanthropy is able to take a wide variety of forms, reflecting the broad range of motivations, goals and values of the individuals who have chosen to give away their assets for public good. It is true that this pluralism often comes at a cost, as it requires tolerance or acceptance of approaches and viewpoints that we may find unpalatable or undesirable. I would maintain, however, that this is a price worth paying in return for the benefits that philanthropic

pluralism brings to democratic societies in terms of supporting a healthy and diverse civil society. As Weaver (1967, p.200) argues:

> *"If we believe in democracy and in the right to express dissenting ideas, a small amount of pathology must be tolerated in order to maintain the health of the main social body, somewhat as protective antibodies are produced in the human body by injecting small amounts of material associated with disease. The edge of desirable experimentation must continuously be tested with vigour and variety, and can be located only by occasionally crossing it. We accept a small risk to make a large gain."*

Adopting a genuinely pluralistic outlook dictates that one does not take a narrow or rigid view of the acceptable forms in which philanthropy is expressed, so in my work I have tended to stop short of claims that philanthropy *must* be done in any particular way. It is still possible within these parameters, however, to contend that certain approaches are preferable to others, or that particular norms are desirable, and I have regularly done so in my published work. I believe, for instance, that it would be desirable to replace the current default of perpetuity for endowed foundations with a norm which dictates that such institutions have limited lifespans – this would still allow for perpetual endowments to exist, but the onus would be on those who want to establish or maintain them to explain *why perpetuity is necessary*, rather than simply assuming it. Similarly, I would argue that philanthropic donors and funders should adopt a norm of giving unrestricted gifts; i.e. rather than stipulating precisely how assets should be used, allowing recipients the agency to decide for themselves. Again, this would not legislate against restricted gifts being possible in some

circumstances, but the onus would then be on those who want to make these kinds of gifts to offer a justification for doing so.

There are other examples of norms that I would consider desirable when it comes to the practice of philanthropy, but this is not the place to list them all. The fundamental point is that I believe philanthropy to be an inevitable, and desirable, feature of human societies; and I would argue that the correct view of the role of philanthropy is a pluralistic one, which acknowledges that philanthropic motives can be expressed in a wide variety of legitimate ways, whilst still allowing for the expression of preference for certain norms or approaches.

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CHAPTER FIVE

Criticisms of philanthropy

Philanthropy has often been a powerful force for good in our country, and has played a major role in shaping the society we live in today. The contention of this book is that it should continue to play an important role in modern Britain, and that by looking at some of the key issues facing philanthropy through a historical lens we will get a much better understanding of what that role should be. But philanthropy has also come in for its fair share of criticism over the years. *The Atlantic* magazine noted in an article about the history of criticisms of philanthropy in the US: *'The debate about the legitimacy of large benefactions became so heated that in 1909 one New Orleans newspaper quipped that philanthropy had become "the recognisable mark of a wicked man".'*[437] While we may not have reached this point in the UK, criticism of philanthropy has still been widespread and has taken various forms, many of which have already been discussed in this book. However, we can also distinguish some broader recurring themes. It is only by understanding these criticisms and seeing how they might be overcome that we can successfully craft a positive narrative about the role of philanthropy as a force for good in society.

'Philanthropy is ineffective'

Perhaps the criticism most often levelled at philanthropy is that it is simply not effective as a way of dealing with social problems. This seems fairly stark and straightforward, but in fact this censure is more complex than

it first appears. It can take many forms – some merely attack the way philanthropy is done in practice, while others challenge the very notion of philanthropy as an enterprise.

Macro-level criticism of effectiveness

As detailed in Chapter 2, the failure of philanthropy to meet the welfare needs of society adequately at the end of the 19th century was a large part of the impetus for the creation of the welfare state. Some saw this failure as evidence of a fundamental flaw in philanthropy. They concluded that philanthropy could never be an effective way of meeting need because even if individual charitable interventions were effective, overall it was just not up to the scale of the challenge. For instance, *The Guardian* in 1891 carried the following withering attack on the notion of philanthropy as a remedy for social ills:

> *'It cannot be too strongly asserted that there is no heroic solution of the social problem in any degree possible. Indeed, the very expression "social problem", where it is not merely rhetorical, is to be deprecated, for it encourages in the public mind that radical misconception of the subject-matter of religion and philanthropy, which thinks of it, speaks of it, and proposes to deal with it, as something simple, measurable, and defined, a rotten limb which may be amputated, not a subtle poison diffused through the whole body. There is no "social problem", but there is an infinitely complex network of social relationships existing under abnormal and perplexing conditions, and deriving from them elements of special danger and difficulty. Heroic remedies ignore the character of the disease which they pretend to cure. They are naturally confined to social quacks, whose ignorance may be honest, but is always profound, and whose confidence is invariably absolute. Any scheme or project which proposes a solution of the entire "social problem" is self-condemned.'*[438]

Others have drawn similarly critical conclusions from a historical perspective about the Victorian notion of philanthropy as a panacea. Benjamin Kirkman Gray, in his posthumously published 1908 book *Philanthropy and the State* (which he had apparently toyed with calling *The Failures of Philanthropy*) echoed *The Guardian*'s conclusions, pointing out: *'A century ago philanthropy was regarded as having what would now be called a socio-political function . . . [and that] conception was a possible one, so*

long as the extent of the problem was not recognised.' However, he argued: '*As knowledge of social facts became more complete and precise, so it began to appear that private corporations could not adequately deal with difficulties which result not from personal but from public causes, and which are as extensive as society itself.'*[439]

He went on to accuse Victorian philanthropists of hubris for believing that *'it was theirs to heal the hurts of the people'.* He notes: '*They were ready at any moment and without training to run the longest race . . . Private individuals were confident of their power to discharge a public function, and the government was willing to have it so.'* Eventually, however, *'it was left to experience to determine that the work was ill done and was by no means equal to the need'.*[440]

Historian David Owen, writing in 1961, came to a similar conclusion, albeit less harshly-phrased, about the overall success of the grand edifice of Victorian philanthropy. He argued: '*As measured against the problem, voluntary effort was performing no miracle. It had not succeeded in bridging the gap between rich and poor, if, indeed, this had been a serious aim, nor had it taken more than a tentative step or two toward civilising the brutish masses or improving their material environment . . . Taken all in all, however hesitant and muddled their work may have been, public authorities did more to improve city life than did private charity.'*[441]

The question of the macro-level effectiveness of philanthropy as a means of meeting the welfare needs of society is considered primarily in the context of the Victorian era because that was the only time – in our country at least – that there was a real attempt to test this approach. Most would agree that the experiment was a failure; perhaps a glorious failure, but a failure nonetheless. And the lesson we take from this failure is largely up to us. There are those who have seen it as conclusive proof of an inherent flaw in philanthropy. Kirkman Gray, for instance, drew the conclusion that philanthropy was doomed to failure because it could never keep pace with need. He argued: *'On the one side is charity, full of generous impulses, though shrinking from the appropriate hard means; on the other the interminable ranks of the ragged army of sorrow; individuals come and go, pass across our field of vision and vanish from sight, while others always continually supply their place . . . The want, which charity, not always unavailingly, has endeavoured to assuage, does nevertheless renew itself with perpetual iteration.'*[442] And he wondered why, given this ongoing imbalance, people

persisted with philanthropy, asking: *'Whence then this strange entanglement around the action of pity, so that the thing desired is never the thing done? What explanation may be given of the contradiction, growing ever more sharp, between the needs of the needy and the spirit of humanity?'*[443]

This is essentially the same argument put forward by the Mexican billionaire Carlos Slim Helú, currently the world's richest man, who has been criticised widely for his lacklustre approach to philanthropy. Part of his reasoning for not having made greater efforts when it comes to charitable giving, despite the high-profile achievements of his peers such as Bill Gates and Warren Buffett, is that he is sceptical about the macro-level effectiveness of philanthropy. He argues: '*We have seen donations for 100 years . . . We have seen thousands of people working in non-profits, and the problems and poverty are bigger. They have not solved anything.'*[444] This led Slim Helú to maintain for many years that he could '*do more good by building solid companies than by "going around like Santa Claus" donating money*'.[445] This echoes very clearly the view of American oil tycoon J Paul Getty, who said: '*If I were convinced that by giving away my fortune I could make a real contribution towards solving the problems of world poverty, I'd give away 99.5% immediately. But a hard-eyed appraisal of the situation convinces me that this is not the case. The best form of charity I know is the art of meeting a payroll.'*[446]

Implications for future philanthropy

It is not necessary to draw quite such gloomy conclusions about philanthropy, however. The lesson from its failure to deliver effective universal welfare or solve all of the world's problems need not be that it is a flawed concept. Rather, these expectations are unfounded: philanthropy is not an appropriate tool to deliver such a national system of welfare services and neither can it solve all of society's problems by itself. As argued in Chapter 2, philanthropy is unable to meet requirements like guaranteeing universality and equity, and voluntary giving is not of the right degree of magnitude to be properly comparable to public spending in any case. But since neither the state nor the private sector has been successful in eradicating need despite hundreds of years of trying, it is hard to see why we should expect the philanthropic sector to have fared any better. Philanthropy has had some notable successes, but it cannot work miracles.

None of the intractable problems in society today are likely to be solved by any one sector acting on its own. It will only be when we find a way of effectively combining the best of the public, private and philanthropic sectors to address some of these issues, which have multiple, complex causes, that we stand a chance of overcoming them. The role of philanthropy is not, therefore, to provide an alternative to taxation-funded public services, or to the market, but to supplement both and bring its own unique strengths to efforts to address the problems facing society. How we make this collaboration and cooperation happen in practice is a challenge that policymakers and practitioners need to address.

Micro-level criticism of effectiveness

The macro-level criticism outlined above still allows that the majority of (or indeed all) individual philanthropic efforts may be effective; it just argues that they do not add up to a sufficient whole. However, many have also criticised individual philanthropic efforts themselves, on the basis that they are perpetuating interventions or remedies for which there is little or no evidence of success, and which are argued to be totally ineffective in delivering the desired outcomes (or, in some cases, even actively harmful).

This is clearly not an argument against philanthropy as a whole; merely against certain approaches to it. As discussed earlier, this was part of the rationale behind the 'scientific' philanthropy movement epitomised by the Charity Organisation Society, which held nothing back in criticising what it viewed as the ill-guided and ineffective charity of others, and saw itself very much as an antidote to such wrong-headedness. This sort of normative approach, which distinguishes between 'good' and 'bad' philanthropy on the grounds of effectiveness, is very much in evidence today. In fact, it may have found its purest expression in the 'effective altruism' movement that has evolved from the work of philosopher Peter Singer.[447] Plenty of people are sold on the idea that we should use data and evidence to determine how best to address particular social issues, but effective altruism goes one step further and argues that the cause to which you give should be determined by the numerical evidence of where the most social good can be produced.[448] In effect, it postulates that some causes are better than others.

Effective altruism is interesting because it has provoked great controversy, even among those who firmly believe in the importance of effectiveness in philanthropy,[449] in much the same way that the Charity

Organisation Society made waves in Victorian philanthropic circles. This just goes to show that a positive motivation – in this case to ensure maximum impact by applying rigour to charitable giving – can have unintended negative consequences if applied in the wrong way (for instance, if organisations are deemed to be dogmatic or overly-judgmental of the philanthropic efforts of others). As argued in Chapter 1, the desire to make philanthropy rigorous could damage it by stifling the motivations that lie at its core, or introduce sectarian divisions between organisations and individuals who might otherwise be working towards a common cause.

Moral criticism of effectiveness

Some have taken the normative approach to philanthropy further by incorporating a moral argument. For such critics, ineffective philanthropy is not just bad because it fails to achieve results; it is reprehensible because it embodies a moral failing. This 'moral failing' is usually tied to a belief in the distinction between the deserving and undeserving poor. The argument is that philanthropy which fails to acknowledge this distinction rewards those who have 'chosen' to live off handouts (the 'undeserving poor') just as much as those who find themselves in poverty through no fault of their own (the 'deserving poor'), and thereby removes the incentive for the poor to 'better themselves'.

Alexis de Tocqueville is most often cited for his enthusiastic comments about voluntary association in the US in *Democracy in America.* But he presented a much less appealing side of himself in putting a vehement case against the moral evil of indiscriminate charity in his *Memoir on Pauperism*:

> *'Man, like all socially organised beings, has a natural passion for idleness. There are, however, two incentives to work: the need to live and the desire to improve the conditions of life. Experience has proven that the majority of men can be sufficiently motivated to work only by the first of these incentives. The second is only effective with a small minority. Well, a charitable institution indiscriminately open to all those in need, or a law which gives all the poor a right to public aid, whatever the origin of their poverty, weakens or destroys the first stimulant and leaves only the second intact. The English peasant, like the Spanish peasant, if he does not feel the deep desire to better the position into which he has been born, and to raise himself out of his misery (a feeble desire which is easily crushed in the*

majority of men) – the peasant of both countries, I maintain, has no interest in working, or, if he works, has no interest in saving. He therefore remains idle or thoughtlessly squanders the fruits of his labours.'[450]



Alexis de Tocqueville.

As we have seen, this moral point of view was put into practice by the Charity Organisation Society, which '*pushed its crusade against mendacity, indiscriminate almsgiving, and laxity in Poor Law administration with enormous zeal . . . secure in the fashionable thesis that ill-considered and unsystematic philanthropy was the chief source of pauperism'.*[451] Even though many disagreed with the COS's approach, and with the underlying notion that there are 'deserving' and 'undeserving' poor people, most would agree that indiscriminate charity is not ideal because it necessarily implies a certain amount of wastefulness, and we should be seeking to eradicate such waste. There have been those, however, who are willing to defend indiscriminate charity, on the grounds that it is preferable to the alternative of overly-discriminating charity. The 19th century cleric Cardinal Manning, for instance, declared that he '*welcomed indiscriminate charity as the lightening conductor which saves us*', and that '*as to waste and wisdom [of donations]',* he was '*content that many unworthy should share rather than one worthy case be without help'.*[452]

The moral criticism was taken even further by those such as the economist JA Hobson, who no longer characterised the failing as one of 'bad' philanthropy, but as an inherent failing of philanthropy of any kind. Hobson argued: '*It is more socially injurious for the millionaire to spend his surplus wealth in charity than in luxury . . . for by spending it on luxury, he chiefly injures himself and his immediate circle, but by spending it in charity he inflicts a graver injury upon society.'* His central thesis was that charity undermines the drive for self-advancement and improvement that is necessary for a true solution to the problem of poverty. Charity, he argued,

'*weaken[s] the personal springs of social reform, alike by the "miraculous" relief it brings to the individual "case" that is relieved, and by the softening influence it exercises on the hearts and heads of those who witness it . . . It [thus] substitutes the idea and the desire of individual reform for those of social reform, and so weakens the capacity for collective self-help in society'.*[453]

Some may find this moral criticism of charity compelling, depending on their views about poverty and individual responsibility. To many people, the more extreme forms of this moral position almost certainly seem unpalatable. However, in more restrained forms it is an argument that we still see today, when people accuse charity of creating and perpetuating dependency.[454]

The Malthusian criticism of effectiveness



Thomas Robert Malthus, by John Linnell, 1833.

Even the extreme form of the moral criticism outlined above is topped by the nihilistic argument occasionally put forward by those who subscribe to the teachings of the population theorist Thomas Robert Malthus.[455] These critics also contend that philanthropy is morally questionable, but not because it is ineffective – rather, precisely because it *is* effective. By saving the lives of people who might otherwise die due to poverty or disease, it is argued, philanthropists are adding to the problem of unsustainable population growth, which Malthus identified as the greatest threat to society. As a consequence, they are not really helping those who are the recipients of their efforts – merely condemning them to prolonged misery. The 19th century Liberal and economic journalist Walter Bagehot took such a misanthropic point of view, arguing: '*Great good, no doubt, philanthropy does, but then it also does great evil. It augments so much vice, it multiplies so much suffering, it brings to life*

such great populations to suffer and be vicious, that it is open to argument whether it be or be not an evil to the world.'[456]

Although many have rejected Malthus' original analysis, the arguments at the core of his work have continued to generate much debate over the last 200 years. There is even a broad school of 'neo-Malthusian' thought, which takes as its starting point the hypothesis that unchecked population growth is unsustainable, and attempts to develop arguments that go beyond those available to Malthus in the early 18th century.[457] However, while population growth is still very much a current issue, it is unusual for charity or philanthropy nowadays to be criticised on these grounds. The idea of deliberately withholding assistance from those in need would be extremely unpalatable to most modern audiences.

'Philanthropy is inefficient'

Slightly different to the idea that philanthropy is ineffective, but still occupying similar territory, is the criticism that it is *inefficient*. Proponents of this view allow that philanthropy may well be able to achieve social goals, but argue that the way philanthropy works in practice means that it takes greater resources to do so than is necessary. Once again there are both macro- and micro-level interpretations of this criticism: the former contends that the philanthropy marketplace as a whole is inefficient, while the latter focuses on the perceived inefficiencies of specific philanthropic initiatives.

Market-level inefficiency

The accusation that there are 'too many charities' and that they are guilty of duplicating each other's efforts and thereby reducing the efficiency of the philanthropic sector as a whole has been levelled by critics many times over the years. We still hear it aired today with reliable regularity,[458] but there have been times in history when the issue was felt far more keenly.

Inefficiency was a source of great concern to many in the Victorian era. They worried that although significant amounts of money were being given to charitable causes, the range of organisations making up the philanthropic sector was so great in number and divergent in quality that a lot of this money was wasted. Hence, *'the charity [world], they insisted, [was] full of small, inefficient, redundant agencies, which had yielded no benefits proportional to their number and to the pounds, shillings and pence collected for them'.*[459]

A particularly pressing problem for the Victorians was the growing number of obsolete charitable trusts. These were legal structures set up on the bequest of a donor to provide funds for some specified charitable purpose, but where that purpose had subsequently become redundant. There was a mechanism for overcoming this problem: the so-called '*cy-près'* rule, which allowed trustees to use funds to address charitable purposes that were sufficiently close in spirit to the original donor's wishes where possible. However, many of these 'zombie' trusts had purposes that were so specific and obscure that it was impossible in practice to apply a *cy-près* approach. So there were a growing number of charities in Victorian England that no longer had a purpose, but whose incomes continued to rise through the interest they earned.

There are many weird and wonderful examples of these sorts of trusts, which give some sense of why people were struggling so much with the tension between respecting the wishes of donors in the past and meeting the needs of the present. Examples include:

- Funds to support sermons celebrating the defeat of the Spanish Armada and the failure of the Gunpowder Plot.[460]
- Various funds for the ransoming of Christian captives from the Turks or Barbary pirates.[461]
- A charitable trust solely dedicated to providing funds for killing ladybirds on Cornhill, in the City of London.[462]
- A trust whose purpose was to maintain an oil lamp at the corner of Billingsgate 'for ever'.[463]
- A (possibly apocryphal) fund to buy faggots of wood for burning heretics.[464]

The problem was particularly acute in London, which was awash with such oddball bequests and funds. And this was a source of great annoyance to those in the capital who were expending a great deal of energy trying to fundraise, as all the time they could see this growing pot of money set aside for charitable causes, yet tantalisingly beyond their reach. Eventually, the problem got so bad that a Parliamentary Inquiry was established to look into it. This led to the introduction of new legislation, which imbued the Charity Commissioners with enhanced powers in the case of City parochial charities (of which there were over 1300). The Commissioners were now, for the first time, permitted to ignore founders' wishes and proceed on a utilitarian

basis in freeing up the money in these trusts for good causes. The process of doing this turned out to be exceedingly complex, and took nearly a decade. The end result was the consolidation of the existing dormant charities into a single fund (the City Parochial Foundation, which survives to this day as Trust for London[465]), which immediately made a series of significant grants. Although this was designed to deflect any criticism by releasing funds as quickly as possible, it was only partly successful. There were still many who had concerns that the City Parochial Foundation represented a dangerous precedent in its ability to override the wishes of donors after the event.

The problem of obsolete or awkwardly-defined charities did not disappear with the formation of the City Parochial Foundation, and continued to be a source of frustration well into the 20th century. In Beveridge's 1948 book *Voluntary Action,* for instance, an appendix is dedicated to the issue of obsolete charitable trusts, which even contains a 'Charities' Chamber of Horrors' detailing particularly egregious examples of the genre.[466] As an example, take The Brown Animal Sanatory Institution, highlighted in the case study below.

CASE STUDY

The Brown Animal Sanatory Institution[467]

Thomas Brown died in 1852 and left property worth more than £20,000 to the University of London to found an institution for studying and treating (for free) diseases in animals or birds 'useful to man'. This in itself would have been fine, but unfortunately he added additional stipulations that it had to be 'within a mile of Westminster, Southwark or Dublin', and that if the University of London did not use the money within 19 years (or used it improperly), it should instead go the University of Dublin for the exclusive purpose of establishing professorships in '*at least three of the following languages: Welsh, Slavonic, Russian, Persian, Chinese, Coptic and Sanskrit*'.[468]

The University of London quickly realised that Brown's first condition was going to be almost impossible to meet (particularly because the terms of the bequest explicitly forbade the use of any

part of the fund to purchase either a leasehold or freehold interest in land in England, so they would have to find a way of purchasing suitable land separately). At that point an unedifying three-way legal battle ensued: between Brown's heirs, who claimed that the whole bequest was invalid, the University of London, who proposed that it should be allowed to keep the money but use it in a more effective manner, and the University of Dublin, who argued that as the first criterion in the bequest could not legally be met, it should receive the money immediately instead.



The Brown Institution, Vauxhall, for the study and treating of diseases in animals or birds 'useful to man'.

The University of London won the case, and then sat on the money for the maximum term of 19 years. It did eventually build an institution in line with Brown's wishes, but it was clear that the original stated purpose of the bequest was out-dated (for one thing, the number of animals in central London had fallen significantly by this point).

The animal hospital was closed at the outbreak of the Second World War and subsequently destroyed in an air raid. There then followed a further 25 years of legal wrangling about what to do with the remaining charitable funds (as the University of

London had not spent the full amount on the original hospital). It was eventually decided that they should be shared between the University of London and Trinity College Dublin, which finally happened in 1971 – 120 years after Thomas Brown's bequest was made.

Implications for future philanthropy

Although systematic regulation of charities has done a lot to overcome the problems caused by obsolete or ill-considered charities, market-level inefficiency remains a challenge for the voluntary sector in the UK, as it does for philanthropic sectors around the world. There is a difficult balance to strike between preventing undesirable proliferation and duplication, and respecting the right of individuals to come together and set up an organisation to address a cause in which they have a shared belief. At the end of the day, philanthropy is an unavoidably voluntary activity, based on the free choices of individuals and communities. If this means that there is some inefficiency in the overall marketplace of philanthropic organisations, then maybe we just have to accept that. Perhaps the lesson is simply that we must adjust our expectations of what an optimal philanthropic sector looks like.

Organisational inefficiency

The claim that philanthropy is inefficient, because individual charitable organisations waste money on things like fundraising or administration, is still heard with depressing regularity.[469] But, like so many things about philanthropy, it is far from new. There were many in the heyday of Victorian philanthropy who suggested that a significant amount of money was spent by charities on things that benefited themselves or their donors, rather than their supposed beneficiaries:

> *'The numerous charity balls, philanthropic dinners and conversaziones, the pretentious central offices, the pages of print devoted to lists of subscriptions, the elegant membership cards – the very organisation of the philanthropic world itself (not to speak of the causes on which its resources were spent) all ensured that such redistribution of the national income as did take place in the 19th century gave pleasure to and even financially profited many of the not-so-poor before it finally filtered down to those in*

real need. Any modern visitor to the London headquarters of the British and Foreign Bible Society, for instance, finds himself amid an architectural splendour worthy of the Medici in their most palmy days.'[470]

Implications for future philanthropy

It is impossible to offer a knock-down argument against this criticism, because there is undoubtedly an element of truth in it: some charities, past or present, do spend their money wastefully. But then this is not a problem unique to charities – the same is true of any sector, as there will always be organisations that either deliberately or unintentionally mismanage their financial affairs. The important thing is that critics do not extrapolate from isolated incidents to a general argument that all charitable endeavours are wasteful. And charities must continue to demonstrate that this is not the case by providing evidence that they are using the donations they receive in an appropriate way.

As argued in Chapter 1, if charities fail to face up to this challenge, then donors will simply decide for themselves how to determine which organisations are effective. This may mean that they rely on unhelpful metrics such as administration costs or salary levels to make their decisions, which will benefit neither donors nor charities. Not only are these poor measures of the actual effectiveness of an organisation (see Chapter 1 for further detail), but often people are basing their decisions on perception rather than actual data anyway. For instance, over half of the UK public believe that charities spend too much on salaries and administration,[471] but it is also clear that people tend to overestimate quite badly the proportion of charitable money that is actually spent on such things.[472]

'Philanthropy is conventional or lacking in ambition'

Philanthropy has occasionally come under fire for becoming trapped in convention or stifled by lack of ambition. Given that one of the things most often cited as the *raison d'être* of philanthropy is its ability to fund unfashionable causes or take on issues that have not yet made it onto the mainstream political agenda, this is a particularly damaging accusation.

Despite the plaudits we often bestow on the Victorians for their philanthropic culture, some have argued that the quantity of their giving was not matched by their level of imagination when it came to picking causes or

organisations. Rather, it is claimed, '*the chief impression left by late-century bequests is not that of eccentricity but of conventionality'.* If we examine wills from the Victorian period, '*few . . . contained anything particularly venturesome or imaginative. Money went, on the whole, to maintain established institutions or to create new ones of the same sort. Hospitals, orphanages, almshouses, church organisations, such eminently respectable national charities as the RSPCA and the RNLI – these were the philanthropies that commonly figured in wills, together with an occasional public park, gift to a library or art gallery, or scholarship or university chair*'.[473]

Some contemporary critics, frustrated by this perceived lack of imagination and ambition, fell back on the 'if in doubt, compare the UK unfavourably with the US' approach. Owen notes: '*There was dissatisfaction in some quarters over the behaviour of British philanthropists'* and that '*a critic might complain of the "great lack of originality on the part of rich men in the disposition of their wealth".' The Times* newspaper took a stance on this issue, and *'was inclined to credit American testators with greater liberality and more interesting ideas than their British counterparts. The bulk of British bequests, the editor insisted, came from childless persons, with no family responsibilities, and went for pretty conventional objects'.*[474]

The accusation of lacking ambition remains one of the most damning that can be levelled at philanthropy. It strikes at the very heart of one of philanthropy's main claims to importance and value – its ability to address causes that others will not take on, or address them in ways that others are unwilling to. If philanthropy is unwilling to break the bounds of convention or afraid to think beyond the *status quo*, then what is the point of it?

In the case of the Victorians, the criticism seems to be that most people were simply lacking imagination, so they went for obvious causes or organisations because that offered the path of least resistance. In more modern cases where we see people or organisations accused of lacking ambition, the criticism is often less about a lack of imagination than an unwillingness to take necessary risks. For instance, a 2012 report on philanthropy and risk in an international development context argued: *'Philanthropy offers genuine potential to actively seek opportunity (with its associated risk) and seek out creative solutions to the most intractable development and social problems . . . [but] in order to innovate, philanthropists need to be much more accepting of failure and recognise that to achieve large-scale change many of their resources may be wasted along the way. Occasional*

failure should be seen as the acceptable cost of innovation.' Unfortunately, however, the same report concluded: *'There is evidence that philanthropists are not willing to take the risks they could with their philanthropy.'*[475] And this conclusion was backed up by research from the Bank of America, who found in a survey of wealthy US donor households that only 2.3% were willing to 'take substantial financial risk' in their philanthropy.[476]

Some have suggested that this risk aversion is an unintended consequence of the demands for a more rigorous, strategic approach to philanthropy. Their argument is that because such a strong emphasis is placed on measurable evidence of 'impact', donors are driven to support established, lower-risk programmes rather than untested innovations where the risk of failure may be very high. For instance, an article in the *Stanford Social Innovation Review* in 2014 suggested: '*Over the last decade, many funders have lost their appetite for experimentation and risk, even as they trumpet their desire to make big bets. The strategic philanthropy movement has swept across the field and helped funders align their programmes and grantmaking with carefully designed theories of change to produce clear and quantifiable results. But the pendulum may now be swinging too far, to a place where foundations are willing to support only safe, established programmes.'*[477]

Implications for future philanthropy

This highlights one of the ongoing challenges for philanthropy: it is subject to myriad variables – economic, political, psychological or emotional. And many of them we do not even understand properly. This means that, as with any complex system, making changes in one area (even if those changes themselves seem positive) can have significant and unexpected impacts in other areas. This is something to continually guard against. If it is true that efforts to make philanthropy more rigorous are reducing the capacity of donors to take risks, this is a real source of concern. Risk taking, imagination and innovation are central to what makes philanthropy a valuable and positive force in our society, so we must do whatever we can to make sure that they are not stifled.

CASE STUDY

Samuel Morley: All the gear, but no ideas?



Samuel Morley, by Manesse.

Samuel Morley (1809–1886) was, in many ways, an unremarkable philanthropist. As heir to an established business and a man of strong religious convictions, he had the financial assets and moral framework common to many philanthropists of the Victorian era. The interest in Morley's case comes from two things: firstly, the criticism he attracted for his somewhat pedestrian approach, and secondly, the one time he deviated from his usual pattern, which gave rise to his most notable philanthropic legacy.

There is no doubt of Morley's generosity of spirit. He was clearly committed to philanthropy throughout his life, and it was said of him: *'Charity was no afterthought in the evening of a life given over . . . to building his fortune. His outlook on philanthropy, as on other matters, reflected his devout Nonconformist faith . . . To Morley with his convictions on Christian stewardship and his own simple, even austere, habits of life, charitable giving was a continuous obligation, not a single magnificent gesture.'* [478]

However, he gave little strategic thought to how his fortune could best be put to good use, choosing instead to be almost entirely responsive in his charitable giving. So, while he was known for his diligence and generosity in responding to fundraising requests, he was criticised after his death as an example of the lack of purpose displayed by many philanthropists at the time. *The Spectator* magazine, for instance, damned him with faint praise in concluding: *'Mr Samuel Morley was in no way a great man, belonging as he did essentially to the British middle class, sound in feeling, hard of head, and narrow in thought; but the general appreciation of him after his death is nevertheless well founded . . . If he took up a cause heartily, he spent on it not only money, but time, thought, energy, and that capacity for organisation which is the great money-makers' gift, and which seems often to relieve them*

from the necessity of possessing any high intellectual quality whatever.'[479] *The Spectator's* ire seems not to have been particularly directed at Morley himself, but rather at a certain sort of unsophisticated approach to philanthropy that the magazine disapproved of, and which he was taken to exemplify. Hence it goes on to complain about *'the kind of catholicity which distinguishes English middle-class philanthropists. They seem to give to everything good, rather than to any cause; to find more pleasure in helping on everything they approve, than in carrying on any one work all by themselves'*.[480] This, *The Spectator* concludes, is the difference between the ideal of philanthropy and the reality, because *'the dreamer who dreams what he would do with money takes up "a cause" in his visions, and thinks it would, were he once rich, prove all-absorbing; but the actually rich philanthropist divides his benefactions, and finds so many objects deserving of help that he completes no single work at all'*.[481] And the article expresses the wish that *'we should like some day to see a Mr Morley concentrate his wealth and his powers on some immortal deed'*.[482]



Caricature of Samuel Morley, by Adriano Cecioni for *Vanity Fair*, 1872.

The major irony is that the one philanthropic project Samuel Morley was involved with which has had the greatest lasting impact was also his biggest deviation from his normal patterns of giving: his support for the Old Vic theatre. This was an odd fit for Morley, the pious Christian, given that he had little interest in frivolity and that the Old Vic at this time enjoyed a less than salubrious reputation. Even the theatre's own official history admitted that it was *'fair to assume that it discharged its*

functions of bar and brothel with something like the maximum of grossness'.[483] Morley's enthusiasm for supporting the Old Vic was initially prompted by a plan to reinvent it as a temperance music hall, but he ended up saving it from financial ruin in 1884 with a sizeable donation that secured its future.

This strange mismatched marriage of donor and cause means that the Old Vic survives to this day, and the name of Samuel Morley is still remembered, even though '*no doubt it would astonish the pious businessman to find himself remembered today as a kind of patron saint of the Old Vic, the single instance in which he deviated markedly from his established pattern of giving*'.[484]

'Philanthropy is patronising or dehumanising'

It has sometimes been said of philanthropy that it is not a desirable way to address social issues, because it is patronising or dehumanising from the point of view of beneficiaries. This can be framed as an overall criticism of philanthropy as an idea, if you accept that the relationship between donor and recipient is inherently and unavoidably one of patronage. Or it can be framed as a criticism of particular, 'bad' ways of doing philanthropy that embody unhealthy donor-beneficiary relationships, while allowing that there are 'good' ways that avoid these problems.

These sorts of criticisms are often levelled by those for whom class is a crucial issue (in particular, socialists and political radicals, because they believe that philanthropy helps to perpetuate broader attitudes and structures they would like to do away with). And perhaps they have a point: there have certainly been proponents of philanthropy who were quite open about the fact that they see its ability to reinforce existing social hierarchies as part of its appeal. The 18th century churchman Richard Grey, for example, argued: '*Charitable foundations . . . give the poor in general grateful and honourable sentiments of and inspire them with a proper Love and Reverence toward their Superiors, to see them thus Active and Solicitous for Their Good; and by consequence promote the Harmony and Subordination, in which the Peace and Happiness of Society consists.*'[485]

One of the most famous critics of charity on the grounds that it is degrading to the recipient was Oscar Wilde. He used his 1891 essay *The Soul of*

Man Under Socialism to argue that charity is a negative force because it allows people to turn their attentions towards addressing the symptoms of society's problems, rather than their root causes. For Wilde, the only real answer to these problems was the adoption of socialism:

> *'With admirable, though misdirected intentions, [philanthropists] very seriously and very sentimentally set themselves to the task of remedying the evils that they see. But their remedies do not cure the disease: they merely prolong it. Indeed, their remedies are part of the disease . . . They try to solve the problem of poverty, for instance, by keeping the poor alive; or, in the case of a very advanced school, by amusing the poor. But this is not a solution: it is an aggravation of the difficulty. The proper aim is to try and reconstruct society on such a basis that poverty will be impossible. And the altruistic virtues have really prevented the carrying out of this aim . . . Men who have really studied the problem and know the life – educated men who live in the East End – [are] coming forward and imploring the community to restrain its altruistic impulses of charity, benevolence, and the like. They do so on the ground that such charity degrades and demoralises. They are perfectly right. Charity creates a multitude of sins.'*[486]

This socialist critique of philanthropy has been adopted in recent times by, among others, the Marxist philosopher and cultural critic Slavoj Žižek, who gave a lecture on the ethical implications of charity in which he quoted Wilde approvingly.[487]

For such socialist critics, although the objects of their ire are the capitalist system and the wealthy individuals who (in their view) embody its failings, the poor are also to blame for some of the problems with philanthropy. By buying into the notion of charity, rather than taking a principled stand and refusing to engage with a system that is flawed, many of the poor, it is argued, are complicit in perpetuating society's problems. This was a core part of the doctrine of many Victorian political radicals, who '*incorporated this hatred of charity into their political creed – the dole was the poor man's equivalent of the hated upper-class pension'.*[488] The radical writer and journalist William Godwin (the father of Mary Shelley, of *Frankenstein* fame) for instance, drew attention to *'the pauper fawning with abject vileness upon his rich benefactor, and speechless with sensations of gratitude for having received that, which he ought to have claimed with an erect mien, and with a consciousness that his claim was irresistible'.*[489] And Wilde made a

similar point, distinguishing between what he saw as the 'right' and 'wrong' attitudes of the poor towards charity:

> *'We are often told that the poor are grateful for charity. Some of them are, no doubt, but the best amongst the poor are never grateful. They are ungrateful, discontented, disobedient, and rebellious. They are quite right to be so. Charity they feel to be a ridiculously inadequate mode of partial restitution, or a sentimental dole, usually accompanied by some impertinent attempt on the part of the sentimentalist to tyrannise over their private lives. Why should they be grateful for the crumbs that fall from the rich man's table? They should be seated at the board, and are beginning to know it.'*[490]

Even if one does not accept the strong Marxist critique of philanthropy, many of the arguments used to justify it do tell us something important about philanthropy in practice. Approaches that embody ideas of subservience and gratitude from beneficiaries, and create an undesirable power imbalance between donors and recipients, paint philanthropy in a poor light and undermine its legitimacy as a means of addressing social ills. For instance, the socialist historian Benjamin Kirkman Gray, who was not opposed to the idea of philanthropy in principle, still criticised the approaches of many Victorian donors, because he saw them as typifying unwelcome attitudes of patronage. He argued: 'A*nother motive that influenced alike the managers of the charities and the subscribers was the love of power . . . [the suspicion] that a love of patronage is at the root of much so-called charity, is confirmed by a remark of Alcock's some half-century earlier. "It's greatly for the interests of charity," he writes, "that the objects of it should be respectful and grateful. We think our kindness in a manner repaid, when it is thankfully received. It's a pleasure then to have done it, and an incitement to do more". . . The need to foster this sense of adventitious superiority may account for the letters of thanks which patients were instructed to write to their patrons.'*[491]

Those who believe philanthropy can be a positive force for change would do well not to ignore the arguments of socialist critics. They pose serious challenges, and philanthropic activities need to be done in such a way that they are not open to the same criticisms. As a salutary lesson in how *not* to do things, it is worth noting the example of the Victorian 'voting charity'. This was a fashion in some philanthropic organisations of the time, where donors

would be given the opportunity to select for themselves the beneficiaries of their charitable largesse. Although it started out as a way of ensuring accountability, this system quickly became corrupted and led to some of the least edifying scenes of 'philanthropy' one could imagine, in which the needy recipients of charity became little more than trading cards or betting chips in a game of competitive altruism among the wealthy. It is reported that '*elections resembled the casino or the race track as rival subscribers backed favoured candidates',*[492] and the tactics employed would not have been out of place in either of those locations, as *'one hears that the walls of the London Tavern were placarded with the names of candidates, sponsors offering to exchange two "Idiots" for a "Governess", or three "Governesses" for one "Female Orphan" . . . About it all there was a certain excitement and an appeal to the sporting instincts of the sponsors'.*[493]

This tactic of playing to the competitive instincts of donors, while evidently distasteful, does seem to have been successful, as it was widely felt that *'seeing an applicant home in a highly competitive field was no small achievement'*[494] and that '*to pick a winner, to bring one's candidate through at the head of the poll was akin, in a morbid fashion, to any triumph on the track, the playing field, or the stock market'.*[495] In this context, success was deemed important, as it '*highlighted the influence of the sponsor and the indebtedness of the nominee'.*[496]

'Philanthropy is self-indulgent or ideologically-driven'

Philanthropy is ultimately reliant on the choices and actions of individuals. This is one of its strengths, because it means that it is able to harness people's personal motivations by offering them a way of expressing their social preferences. It can, however, quickly become a weakness and a focus for criticism if those choices and actions are seen as self-indulgent or overly ideological.

The self-indulgent living

Chapter 1 highlighted that one of the defining moments in the development of modern philanthropy was the shift from a Catholic to a Protestant conception of charity, with the accompanying change of focus from what the act of giving meant for one's soul in the afterlife to what it achieved in the world as a result of the gift. However, not all Protestant philanthropy was impeccably strategic and selfless. Although the focus was now ostensibly



'A Christmas Reminder'. Cartoon by Udo Keppler for the satirical magazine *Puck*, 1901. Illustration shows Puck addressing Andrew Carnegie who is poring over the 'Plan for the Carnegie Library'; Puck gestures toward an elderly couple standing at the door in the cold winter wind and snow and says, *'books are already so cheap and libraries so abundant that even the poorest man has all the literature he wants. Now, why not provide respectable homes for the people who are too old to work and who were never able to save anything from their scanty wages; – and so keep them from beggary, starvation or suicide?'*

on what giving achieved in terms of improving the world, many still paid more attention to how it made them feel personally, and used philanthropy as a way of shoring up their own beliefs. So, in the 18th century, we increasingly see the idea of charity as '*a sentimental escape from the troubles of this world'.* Now, '*rather than face the reality of public distress or private misfortune, the 18th-century man or woman delighted to take refuge in a comfortable and unreal haven of sentimentality.'* And for these donors, '*giving was a pleasure that made them forget worry and fear; the agreeable sensations which attend the charitable drove away harsh thoughts of injustice and pain'.*[497]

The criticism of self-indulgence is one we also see directed at the Victorians. Although the scale of their charitable endeavours and the pervasiveness of philanthropy in their society are clear, there was a suspicion that a large body of this philanthropy was primarily an agreeable pastime for the middle classes. For many donors and volunteers '*the daily or weekly round among the poor was a source of immense pleasure [because] . . . despite encounters with hardship and disease, it could be the one bright spot in an otherwise dreary landscape . . . To be needed, to be counted*

upon, to be called "dear" and "friend" by those more obviously in distress was a great reward'.[498] It might well have been the case that '*reclaiming the intemperate was . . . as effective a remedy for boredom and invalidism as alcohol itself'*, and *'many well-to-do housewives certainly came to look on "slumming" as a pleasure'.*[499]

Of course, if the philanthropy of the Victorian 'do-gooders' was achieving effective results, then it would not necessarily matter if the motivations for doing it were not exactly as we might wish. However, it has been argued that the desire to undertake philanthropy as a pleasant hobby led too many Victorian donors to shy away from the really pressing problems facing their society – many of which were uncomfortable and difficult to address – and instead focus on marginal or even frivolous issues that better met their need to feel good about themselves. Contemporary critics bemoaned the arbitrariness and shallowness of much 19th-century charity; the religious and political orator William Johnson Fox wrote: '*The worst of the moral sensibility of the English public . . . is that it is so irregularly and partially excited, that it penetrates so little below the surface and that it so very often diverts attention and exertion from the root and trunk of national immorality to some petty branch or quivering twig.'*[500]

Even when the accusation of arbitrariness cannot be made, and the issues being tackled are clearly valid charitable causes, philanthropists can still come in for criticism from those who have a different view of where priorities lie. Standard Oil founder and celebrated philanthropist JD Rockefeller, for instance, came under fire during an investigation by the US Congress Commission on Industrial Relations for the focus of his donations:

> *'Frank Walsh, the chairman of the commission, recalled the complaint of a Colorado coal miner about $250,000 of Rockefeller Foundation money that had been allocated for a retreat for migratory birds. That money, the miner insisted, had come from the labor of men like him who should have had a say in how it was spent. "He protested against this apportionment of the wealth to the migratory birds," Walsh remembered. "He said he wanted first to see established a safe retreat for his babies and his wife".'*[501]

This is a criticism that we still see today, when the causes a donor chooses to support are called into question for being self-indulgent. Google founder Larry Page's plans to use his wealth to support the establishment of a colony on Mars, for instance, met with scepticism from some quarters. The

US website *Inside Philanthropy* made the point: '*The real problem here is that philanthropic dollars are a finite resource, so how they are spent is exceedingly important*.' It suggested that Page's approach was problematic because, *'imagine if every philanthropist thought like Page: we'd have a lot of grandiose plans for solving problems that don't really exist while the more pressing issues get ignored. So through this lens, it starts to look less like philanthropy, and more like some rich kid's fantasy'.*[502]

This sort of censure raises once again questions about the role of philanthropy, the responsibilities of those with wealth, and what the rest of society is entitled to expect of them. It also throws into sharp focus the fact that the element of donor choice that lies at the heart of philanthropy can lead to criticism if the issues a donor chooses to focus on are perceived to be frivolous or self-indulgent, and if others believe that the donor has an obligation to address more pressing needs.

Implications for future philanthropy

This tension between personal freedom and responsibility to society is one that all philanthropists must grapple with when choosing where to focus their efforts. It is not for other people to tell an individual what to do when it comes to giving their money away, but that individual should also recognise that others may disagree with their choices, and if they want to counter such criticism, they should be prepared to defend those choices.

CASE STUDY

Thomas Holloway: The good, the bad and the ugly of philanthropy?



Thomas Holloway (1800–1883) was a wealthy Victorian businessman who made his fortune selling patent medicine, and put a large portion of it towards philanthropic works. He is probably best known today for founding Royal Holloway College, now part of the University of London.

Engraving of Thomas Holloway, from a photograph by Elliott & Fry, 1884.

Holloway is interesting because his charitable works encapsulate both some of the best, and what many might consider some of the worst, aspects of philanthropy. On the plus side, Holloway did not choose easy or popular causes: Royal Holloway College was conceived as a college of higher education for women, with a view to it becoming a standalone women's university, at a time when there were very few higher education opportunities available for women. Likewise, Holloway's other main project, The Holloway Sanatorium, was designed as a curative institution for the mentally ill, based on research into approaches on the continent and in the US, and was a long way from the normal mode of the Victorian insane asylum.

Also counting in his favour was the considered and strategic approach that Holloway took to choosing his philanthropic projects. It was this that led him to focus on a small number of major projects rather than spread his generosity more widely. It is noted: *'There was nothing impulsive about his choice of philanthropies. On the contrary, he studied the possibilities with exemplary deliberation, took counsel from a variety of advisers, and reached his decision only after years of reflection. Apparently he saw in the benefactions of George Peabody, the American, a challenge and even a rebuke to wealthy Englishmen. From the beginning he made it clear that he would concentrate on one or two important projects of national utility rather than scatter his resources on a variety of minor schemes.'*[503]

The flipside of this is that Holloway was clearly driven by a desire to boost his own status and rather enamoured of the image of himself that he obtained through his good works. By choosing to found physical institutions, he was able to attach his own name to them and ensure that everyone was aware of his role in their construction. This suited Holloway because *'he obviously enjoyed the twin satisfactions of contributing to social progress and wielding power, albeit in the interests of benevolence . . . Unlike many of his well-to-do contemporaries, [he] was little tempted to scatter his wealth semi-anonymously over the charity terrain.*

Instead, he elected to put the bulk of it into bricks and mortar (and endowment) for the two institutions that he founded'.[504]



Royal Holloway College, the upper quadrangle.

Apart from the slight question mark over the purity of Holloway's motivations, it was his dogmatism and micro-management when it came to the construction of the institutions he was funding that brought the most criticism. He refused, for instance, to listen to those who suggested that his choice of location for Royal Holloway College (Egham in Surrey) would make it isolated from all the other existing academic centres. He drew further disapproval for the design of the college, which many felt to be ridiculously opulent. One can see his critics' point: rather than adopting a practical, low-cost approach, Royal Holloway was built as a foot-by-foot replica of Château Chambord in the Loire Valley (albeit in brick, rather than stone). The blame for this rested solely with Holloway, as he obsessively micro-managed the project from beginning to end. As a case in point, one (possibly apocryphal) story has it that when the architect submitted the final plans to him for approval, Holloway travelled to Chambord to check that nothing had been missed. Apparently all was perfect, except for a small and inaccessible dormer window on the east front that was lacking in the architect's plans. Holloway immediately demanded that the architect draw up new plans to rectify the omission.

Holloway is an intriguing and confusing figure, and is in many ways an anomaly among donors of his time. But whatever questions there might be about his motivations or methods, in purely financial terms he was one of the most significant donors of his age:

> *'If a portrait [of a "typical" Victorian philanthropist] could be drawn, it would bear little resemblance to Thomas Holloway. He seems, perhaps to have less in common with his English contemporaries than with certain American multimillionaires, who during most of their careers were concerned only with business success and whose sense of social responsibility flowered late. For Holloway lacked the interest in a profusion of good works that marked the characteristically charitable Victorian, and religious motivation, if it existed at all, was not conspicuous in his activities. Yet measured by the total of his benefactions, which totalled well over a million pounds . . .[he] was certainly one of the two or three preeminent philanthropists of this time.'*[505]

Telescopic philanthropy

A specific condemnation made in some quarters in the past was that too many donors chose to focus on giving overseas (often for missionary work), rather than addressing the multiple pressing needs at home. Charles Dickens coined the term 'telescopic philanthropy' to describe this phenomenon, and mocked it in his novel *Bleak House.* In this book, Mrs Jellyby is set up as a figure of ridicule for giving all of her attention to overseas philanthropic projects (including the wonderfully-named 'Borrioboola-Gha venture'), while ignoring the plight of the poor on her doorstep. Even her own family are left to fall into poverty and destitution while she continues to pour her energies into projects in Africa.

The Times took a particularly scathingly position on telescopic philanthropy, accusing such donors of taking the soft option:

> *'Philanthropy in former days was not an agreeable pastime. A man who devoted himself to raise the fallen, to succour the indigent, to cleanse the gaol or transport-hulk, or slave ship, had need of a vigorous will, a burning and yet constant enthusiasm, a strong frame and not over-delicate nerves; for in those days men did things themselves, and not through the agency of societies, with an office, a secretary and an organisation for colossal begging . . . But modern philanthropy does not run such dangers . . . The parliamentary lover of his kind leads a by no means unpleasant life. He converts the heathen, succours the afflicted and civilises the barbarian,*

without ever seeing a ragged garment or a tawny skin. He is the chairman of meetings and the lion of soirees, on account of his interest in populations which he has never visited and his knowledge of the moral state of islands which he could not point out on a map.'[506]



'The Gospel according to "Saint John"'. Cartoon by Udo Keppler for the satirical magazine *Puck*, 1905. It shows John D Rockefeller holding a bag labelled 'Foreign $ Missions' close to his side, sitting on millstones labelled 'Standard Oil Millstone', grinding or squeezing money from people caught between the two stones; with his left hand he offers a copy of the Bible to a native man.

The newspaper even reprinted a poem from the satirical magazine *John Bull*, entitled 'Ode to Modern Philanthropy', which mocked telescopic philanthropists in verse:

'To common optics objects will appear
Dim or distinct, as they're remote or near;
Distance invariably decreasing clearness:
While objects, to the philanthropic-eyed,
At distance more distinctly are descried,
But rendered petty and obscure by nearness.

Your thorough-bred philanthropists can glance
Their pitying eyes over the earth's expanse,
Till sorrow all their bosoms discomposes
For their black brethren sold to whips and chains;
And not a single sympathy remain
For starving whites who die beneath their noses.'[507]

Although we do not see quite the same language used nowadays, similar sentiments are sometimes expressed by those who take exception to the work of international development charities. There are clearly a host of wider issues to do with the effectiveness and efficiency of aid spending, but the old adage that 'charity begins at home' is still used and abused to suggest that those who give to international development causes (including governments) should think about the needs in their own country first.[508]

The road to hell: paved with good intentions and asphalted with ideology?

Even in those cases where Victorian philanthropists did choose to face up to the big issues of the day, they sometimes brought ideological baggage with them that undermined the good they were trying to do. The Charity Schools movement of the late 17th and 18th centuries is a case in point. Charity schools were free schools for children of the poor, designed to offer them a basic education. On the face of it, this seems a sensible solution to an obvious need. However, it became apparent that the schools were less about providing an education for the working classes than a way to serve an ideological desire to prevent the spread of Catholicism in order to protect the middle classes.

The curriculum in these Charity Schools was deliberately limited and joyless; designed to inculcate the poor with the necessary knowledge and habits of hard work and sobriety to meet the country's future needs for factory workers and labourers. The conflict between the desire to give the poor a little education and the concern not to give them too much led to heavy criticism. According to many of these critics, it failed to meet either its own aims or the needs of its supposed beneficiaries. Lord Kames, a central figure of the Scottish enlightenment,[509] accused Charity Schools of being *'more hurtful than beneficial . . . [because] young persons who continue there so long as to read and write fluently become too delicate for hard labour and too proud for ordinary labour'.*[510]

The necessity to look beyond ideology in picking philanthropic approaches remains just as relevant for today's donors. Even when people display a high level of commitment to addressing a real social issue, if they choose to do this in the wrong way on the basis of their preconceptions and beliefs about the nature of the problem, they can do more harm than good. The best-known example of this phenomenon is the 'scared straight'



'An Object Lesson'. Cartoon by John Pughe for the satirical magazine *Puck*, 1901. Illustration shows Charles M Schwab holding a moneybag labelled 'Schwab', standing next to Andrew Carnegie who is sitting on the ground, holding a moneybag labelled 'Carnegie' and with a basket labelled '$10,000,000 for Scotch Universities' overflowing with money next to him. Schwab gestures toward factories on the left as he addresses Carnegie; in the background, on the right, is a line of old men wearing caps and gowns and carrying 'Diplomas' under their arms, emerging from a building labelled 'University'. Schwab says to Carnegie, *'this is the school most people must go to, and the one that has always turned out the biggest men. That other school is for the few and is already turning out too many doctors, ministers, lawyers and clerks. Don't you think we ought to improve conditions in our school rather than in that other one?'*

approach that originated in the US in the 1970s and continues to be used in various guises. Scared straight programmes are based on the idea that young people can be dissuaded from a life of crime (often gang membership or drug dealing) by educating them about the realities of those things through contact with former offenders and law enforcement officers. In many ways this sounds eminently plausible. Unfortunately, repeated evaluations have shown that scared straight programmes not only don't work, they actually *increase* the likelihood of participants subsequently getting involved in crime.[511] Despite this clear evidence, some people continue to advocate for the scared straight approach because it fits with their ideological view of how criminal justice should work.[512] For philanthropists, this offers a cautionary tale about the dangers of placing ideology first when choosing their approach, as they risk not only undermining their own efforts, but furthering the very problems they are trying to solve.

The frivolous dead

Concerns about self-indulgence extend beyond the philanthropy of the living: if anything, those who choose to give after their death in the form of a bequest have come in for even more severe criticism on these grounds. As we saw in the section on inefficiency earlier in this chapter, the tension between respecting the wishes of donors in the past and meeting the needs of today's society has presented a challenge for many years. The previous discussion assumed that even if a donor's choice of cause or their stipulations about how the money was to be spent were problematic, their original motivations were broadly good. However, there are plenty of instances in which it is hard to take such a generous interpretation.

Numerous individuals have attempted to leave legacies that seem frivolous, bizarre or even deliberately designed to offend. For instance:

- Cornelius Christmas, who, taking his own name as a basis, left a bequest from which the income was to be distributed in the form of bread, coals and money '*to the poor of Great Yarmouth, in the week before Christmas Day, every year hereafter and at no other time, for ever*'.[513]
- A man named Greene left a bequest that aimed to supply women with green waistcoats trimmed with green lace, while a man named Gray provided for garbing the poor in grey.[514]
- A woman who left her money to an Oxford University College to '*pay the gate fines of those young men who loved life so well that they returned over-late in the evening*'.[515]
- Thomas Nash, who attempted to leave a bequest in order to insult his wife. Nash left money to the bell-ringers of Bath Abbey on condition that every year on the anniversary of his wedding they should *'[ring] the whole peal of bells with clappers muffled various solemn and doleful changes allowing proper intervals for rest and refreshment from eight o clock in the morning until eight o clock in the evening*' and that conversely, on the anniversary of his death, they should '*ring a grand bob major, and merry mirthful peals unmuffled, during the same space of time, and allowing the same intervals as above-mentioned, in joyful commemoration of my happy release from domestic tyranny and wretchedness'.*[516]
- A story recounted in *The Times* of *'[a] Toronto lawyer, [who] with that quiet irony which lawyers sometimes use to season their dreary*

tasks, has recently bequeathed a fortune of two million dollars to persons of a carefully chosen inappropriateness. Valuable brewery shares go to strongly Prohibitionist Methodist ministers on condition that they play their full part as directors. Shares in racing courses are allotted to well-known opponents of the Turf, on the same terms of active participation. If the bequests are refused they go after nine years to whichever woman in Ontario has had the largest family in the meantime. That lawyer indulged to the full the natural human impulse to make an impressive exit and to leave a stir behind'.[517]

Some of these examples were successfully challenged on the grounds that they did not demonstrate sufficiently charitable purposes. However, some – and worse examples besides – were found to be valid and survived. They became grist to the mill for those charity reformers who argued that such trusts exemplified why the 'dead hand of the donor' needed to be challenged. The fight to achieve this aim contributed greatly to the establishment of a permanent Board of Charity Commissioners, which put the regulation of charities on a more official footing (and led, eventually, to the formation of the modern Charity Commission for England & Wales). Added to that, the clarification of what constitutes an acceptable charitable purpose in law via a succession of legal cases (the most important being the *Pemsel Case* of 1891, in which the judge's ruling outlined the 'four heads of charity)[518] went some way towards removing the grey area that had allowed frivolous and bizarre trusts of this kind to exist.

Implications for future philanthropy

As argued earlier in this book, donor choice is vital. The right for people to choose where to give money of their own free will is a defining principle of philanthropy. It is not for government or society to tell a donor what to give to, but crucially they can set limits by defining the boundaries of what constitutes an acceptable charitable purpose. This may also set the eligibility criteria for tax relief on charitable donations by specifying that only organisations that fall within these boundaries (or perhaps a subset of them) are valid recipients of tax-effective gifts. Once these limits are set, however, the principle of free choice must be respected. In some cases we may not particularly like the causes a donor chooses to give to, but we either have

to accept it as the price we pay for having a culture of philanthropy, or challenge the definition of charitable purposes that includes that cause.

The serious lesson from the slightly oddball examples given above, therefore, is that what constitutes an acceptable charitable purpose is an ongoing source of debate. Modern philanthropists should be aware that even if they are operating within the bounds of existing laws, they may come in for criticism on the grounds that they have chosen to focus on causes or organisations that others view as contentious. If this is the case, they may have to be prepared to make a renewed case for why their activities should be viewed as charitable.

'You can't do good with bad money'

Some have argued that any positive impact that philanthropy might have is undermined by the negative impact of the methods used to accumulate the underlying wealth in the first place. Again, this can be phrased as a general criticism of philanthropy as an idea, or as a specific censure of individual philanthropists and their approaches.

Those who object to philanthropy as an idea tend to argue that the capitalist system itself produces social ills such as inequality, so anyone accumulating wealth within that system is contributing to the perpetuation of these problems, regardless of any subsequent good they try to do with their money. This is somewhat similar to the Marxist criticism of philanthropy outlined earlier in this chapter, where it is really capitalism that is being judged at fault, rather than philanthropy itself. An argument of this kind was at the heart of the case made by Peter Buffett, son of billionaire philanthropist Warren Buffett and a major donor in his own right, when he wrote an article in the *New York Times* criticising philanthropy and what he termed the 'charitable industrial complex':

> *'As more lives and communities are destroyed by the system that creates vast amounts of wealth for the few, the more heroic it sounds to "give back". It's what I would call "conscience laundering" – feeling better about accumulating more than any one person could possibly need to live on by sprinkling a little around as an act of charity . . . But this just keeps the existing structure of inequality in place. The rich sleep better at night, while others get just enough to keep the pot from boiling over. Nearly every time someone feels better by doing good, on the other side of the world (or*

street), someone else is further locked into a system that will not allow the true flourishing of his or her nature or the opportunity to live a joyful and fulfilled life.'[519]



'A phase of our tax system - the greater the service, the heavier the tax'. Cartoon by Udo Keppler for the satirical magazine *Puck*, 1911. Illustration shows two men labelled 'Charity Worker' addressing an oversized man sitting on a throne, taking money from a box labelled 'Rents'. The men are saying, *'We thank you for your generous contributions for the relief of the suffering poor, but why don't you replace those rookeries with model tenements and relieve their miseries in that way?'*, to which the enthroned tenement-house owner replies, *'Why? Why because, if I did, the city would fine me with increased valuations and heavier taxes!'*

The response to this is broadly the same as to the Marxist argument. Although it raises important questions in a theoretical sense, from a pragmatic viewpoint there is no option but to work within the current capitalist system to minimise the negative impact of the way money is created, while at the same time maximising the positive impact of philanthropy. The relationship between philanthropy and inequality is complex and multi-faceted, and it is not easy to use philanthropy as a tool to address inequality. However, it is possible to continue to harness the best of philanthropy in its current form to address the problems of society right now. This still leaves it open to challenge the broader framework of capitalism at the same time, although admittedly this can be a difficult balance to strike.

Those who criticise individual philanthropists and their approaches are willing to allow that capitalism can be a positive force, and that wealth accrued within this system can be used for social good, but argue that in some cases the line of work or business practices of an individual donor undermine their philanthropic efforts. No less a figure that George Bernard Shaw found himself embroiled in a controversy over this question of whether it was possible to 'do good with bad money' through philanthropy. His play *Major Barbara* is about a young female Salvation Army officer, Barbara Undershaft, who becomes disillusioned when the organisation accepts donations from an arms manufacturer (who happens to be her father) and

a whisky distiller. Many critics thought this represented a blistering attack by Bernard Shaw on the hypocrisy of charities that accept donations from questionable sources. However, in a preface to later versions of the play, he made it clear that he thought it was eminently sensible for charities to take money from any source, because at least that way some good would be done with it.

> *'Even the handful of mentally competent critics got into difficulties over my demonstration of the economic deadlock in which the Salvation Army finds itself. Some of them thought that the Army would not have taken money from a distiller and a cannon founder: others thought it should not have taken it: all assumed more or less definitely that it reduced itself to absurdity or hypocrisy by taking it. On the first point the reply of the Army itself was prompt and conclusive. As one of its officers said, they would take money from the devil himself and be only too glad to get it out of his hands and into God's. They gratefully acknowledged that publicans not only give them money but allow them to collect it in the bar – sometimes even when there is a Salvation meeting outside preaching teetotalism . . . On the point that the Army ought not to take such money, its justification is obvious. It must take the money because it cannot exist without money, and there is no other money to be had. Practically all the spare money in the country consists of a mass of rent, interest, and profit, every penny of which is bound up with crime, drink, prostitution, disease, and all the evil fruits of poverty, as inextricably as with enterprise, wealth, commercial probity, and national prosperity. The notion that you can earmark certain coins as tainted is an unpractical individualist superstition.'*[520]

Bernard Shaw exhibits an intriguing mixture of pragmatism and cynicism in his defence of philanthropy against this criticism, but many charities today would not be quite so phlegmatic about taking money from sources that overtly conflicted with their mission. The Red Cross, for instance, found itself in such a situation in 1997, when it was approached by Andrew Morton, author of a controversial biography of Princess Diana, who wanted to donate proceeds from an updated version of his book to charity (the new version had attracted particular disapproval because it was seemingly rushed out in the wake of Diana's death). *The Guardian,* in an editorial on the story, asked: '*Should the Red Cross take the bent Morton penny*?' and

referred to Bernard Shaw's earlier views, noting: *'Shaw . . . was robust about such moral dilemmas: donations from contaminated sources should always be accepted so long as the recipients were confident that they would not be contaminated. He would have wanted the Red Cross to accept the cash – and condemn the giver. No donation – however large – alters the moral position of an immoral act.'* [521] However, the paper disagreed with Bernard Shaw's conclusion, arguing: *'Moral organisations can be demeaned by their donors, particularly if the donors are seeking to make themselves look more moral. That's why the major cancer research charity is right to reject all grants from the tobacco industry – and why the Red Cross is right to be wary of Mr Morton.'*[522]



George Bernard Shaw by Elliott & Fry, 1900.

Even if an individual's line of work does not raise ethical issues when it comes to their philanthropy, the way in which they run their business can still present problems. The great industrial philanthropists of the early 20th century such as Rockefeller and Carnegie faced strong censure on these grounds. Rockefeller, in particular, brought this issue to the frontline of public discourse in 1905, when his gift of $100,000 to the American Board of Foreign Missions met with strong criticism.[523] Many felt that Rockefeller's

money was 'tainted' by his unethical business practices, and that the American Board should not accept his donation because that would mean an implicit pardoning of these practices.[524] This led to a furious debate in which all the ethical, legal and practical considerations were considered at length. Although the American Board ended up keeping the money, there was no clear conclusion on the bigger question of what to do with such 'tainted donations'.

Carnegie faced similar criticisms and addressed them head-on, although his argument is not one that paints philanthropy in a particularly favourable light. It amounted basically to the claim that it was justifiable for him to maximise his profits through questionable work practices, rather than improve pay and conditions for his employees, because that way he would have more money to spend on philanthropy. This was in the workers' interests, he argued, because he could be better-trusted to address their needs through his philanthropy than they could be to look after themselves if the money was in their own pockets:

> *'Workingmen on both sides of the Atlantic questioned whether the Pittsburgh steelmaker's huge charitable donations would have been better spent on higher wages, improved working conditions, and an eight- rather than 12-hour workday. Carnegie responded in a speech in Pittsburgh that he kept wages low to remain competitive, and that even had it been possible for him to share some of his profits with his workers, it would have been neither "justifiable or wise" to do so. "Trifling sums given to each every week or month . . . would be frittered away, nine times out of ten, in things which pertain to the body and not to the spirit; upon richer food and drink, better clothing, more extravagant living, which are beneficial neither to rich nor poor." The lower the costs of labour, the higher the profits. Far better, in his view, to squeeze money from workers' paycheques, aggregate it, and give back to the community in the form of public libraries and concert halls.'*[525]

One would hope that this sort of paternalistic justification would not be used by many of today's philanthropists, and that they would instead acknowledge the need to implement fair working practices and pay structures at the same time as undertaking philanthropic activities. However, this fight has not yet been won, by any means. Some, for example, have criticised the philanthropy of Mexican billionaire Carlos Slim Helú on the grounds that the

damage done by his approach to business outweighs any good he might be doing through his donations. A *New York Times* article reported: '*Sceptics argue that the value of Mr Slim's philanthropy has to be measured against the damage his telephone monopoly did to the economy,*' and carried a quote from a professor at a Mexican university who said: '*At some level I can applaud his philanthropy, but it would be better for Mexico if he stopped blocking competition first.*'[526]

It seems increasingly unfeasible, however, to maintain a 'left hand/right hand' distinction between business and philanthropy in which the purposes to which money is put are seen as totally separate from the way in which it was made. Increasingly, there is an emphasis on companies and their leaders taking a 'responsible business' approach, in which social and environmental concerns are woven into day-to-day business practices.[527] For individual philanthropists who buy into this ideal, it is clear that seeing philanthropy as totally distinct from one's wealth creation does not really wash, as the same underlying motivations and considerations apply to both.

CASE STUDY

George Cadbury: Sweet charity with a hard centre

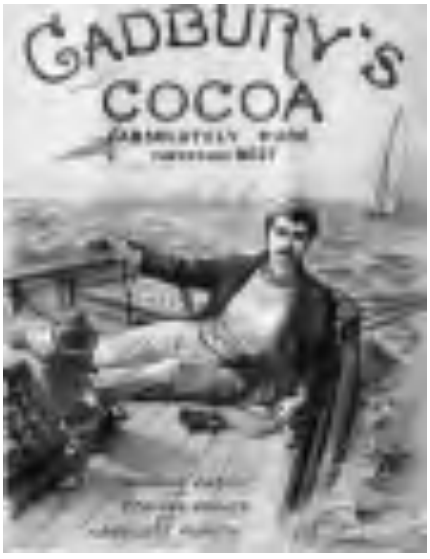


George Cadbury, 1909

Along with the other famous Quaker confectionery families, the Rowntrees and the Frys, the Cadbury family had a huge impact on the history of philanthropy in the UK (more on the history of philanthropy in the chocolate industry can be found in the case study in Chapter 4). George Cadbury (1839–1922) was perhaps the most notable of the Cadbury donors. Like many of those whose philanthropic legacy has lived on to the present day, he made real efforts to address the underlying causes of social issues rather than just addressing their symptoms because '*in spite of his deep compassion, Cadbury*

was not much interested in relieving temporary distress, nor in applying what he thought of as palliatives. He could deplore the way in which philanthropists seemed satisfied to deal only with "superficial evils", and . . . [made efforts] to assist "those who are seeking to remove their underlying causes"'.[528]

What really distinguishes George Cadbury is his holistic approach. Many others also applied philanthropic principles to their business activities, or combined campaigning philanthropy with politics, but Cadbury was notable for the sheer extent to which he saw no distinctions between philanthropy, business and politics. For him, they were all merely an extension of his Quaker beliefs, and he saw no contradiction in combining them: *'To an extent that his business contemporaries found more than a little mysterious, almost traitorous, Cadbury's whole career was, in the broad sense, a venture in philanthropy. He was contemptuous of the rich men who devoted the morning and noon of their lives to making money and the evening to giving it away, and of those who kept the money-making and their benevolent activities in well-insulated compartments.'*[529]



Cadbury's Cocoa advert, 1874.

On the question of whether it is possible to 'do good with bad money' considered above, Cadbury was very firmly of the mind that it is not, because he believed that philanthropy cannot be considered in isolation from how the underlying wealth was created in the first place. As far as he was concerned '*making money and giving it away formed . . . a single pattern, and making it could be as constructive socially as giving it away. No amount of philanthropic giving could take the curse off a fortune that had been accumulated carelessly or without regard for the welfare of the workpeople who had laboured for it'*.[530]

Probably the most famous way in which Cadbury put his views into practice was in the construction of the model workers' village of Bournville, built to provide affordable housing for the working classes (including his employees) when the Cadbury factory expanded and moved to the countryside outside Birmingham.



A suggestion box for workers at the Cadbury factory in Bournville – just one of the many innovative employment practices introduced by Cadbury. In the first seven months after the system was introduced more than 1,000 suggestions were received; a high percentage of them were found to be sufficiently useful to be adopted.

Cadbury's views on responsible business sound forward-thinking even to modern ears, so one can only imagine what his contemporaries must have made of them. However, the commercial success of the Cadbury business, despite the application of such unconventional approaches, provided a compelling argument for Cadbury's vision. And this was important to him, because '*he saw [his approach] as a pilot experiment in social welfare which, if successful, might provide a model for industry as a whole. And . . . he demonstrated that such unconventional views were by no means incompatible with a wildly profitable business*'.[531] Unfortunately, none of his peers seemed willing to follow Cadbury's example. This is perhaps unsurprising when we consider that it is only now, nearly 100 years after his death, that the commercial world as a whole is starting to catch up with Cadbury's vision and accept that principles of social and environmental responsibility can be incorporated into successful mainstream businesses.

Cadbury was also unafraid to take on issues with a clear political element, and once again to use all the tools at his disposal to do so. In the same way as his contemporary John Passmore

Edwards (see case study in Chapter 3), Cadbury used his ownership of a newspaper as a means to exert political pressure and further his social aims. This included promoting the introduction of old-age pensions and highlighting the exploitation of workers in sweatshops. His opposition to the Boer War also acted as a catalyst for him developing a high-profile role as an anti-imperialist and pacifist.

Cadbury stands as a towering figure in UK philanthropy: a man for whom philanthropy was not a limited activity to be tacked on to commercial and political endeavours, but an ethos that pervaded every aspect of his life and work. His blurring of the boundaries between business and philanthropy, in particular, sets an example that even now we are still trying to understand how to follow.

[386] This is not the place for a full history of the Charity Commission, but some clarification is required. The system of Charity Commissioners was made more formal with the introduction of a permanent Board in the mid 19th century. The powers of these Commissioners were then incrementally increased until the Charities Act (1960) established the Charity Commission as an independent organisation. The powers of the Commission were regularly reviewed and enhanced, and in 2006 the updated Charities Act established the current Charity Commission for England and Wales. One further point to note is that prior to the introduction of devolved government in both Scotland and Northern Ireland, there was not really a question over jurisdiction; however, following devolution both countries established their own charity regulators (the Office of the Scottish Charity Regulator and the Charity Commission for Northern Ireland). In the course of the text, I have used 'Charity Commission' to refer to the organisation operating in England and Wales (and by extension Scotland and Northern Ireland prior to devolution) at the relevant point in history.

[387] Quoted in (Jordan, 1959), 186.

[388] Chuck Feeney, one of the world's biggest philanthropists, has long espoused a mantra of 'giving while living'. This is explored in detail in (Atlantic Philanthropies, 2010). Feeney himself used the majority of his wealth to establish the Atlantic Philanthropies foundation back in 1982, and remains heavily involved with its work.

[389] (Gowen, 2013).

[390] (Owen, 1964), 31.

[391] (Owen, 1964), 48.

[392] (Owen, 1964), 57.

[393] (Owen, 1964), 480.

[394] *Ibid.*

[395] (*The Times,* 1880).

[396] (Owen, 1964), 176.

[397] (Andrew D, 1989), 17.

[398] (Prochaska, 1980), 125.

[399] (Owen, 1959), 149.

[400] *Ibid.*

[401] (Sturges P, 1996), 264.

[402] (Owen D, 1964), 53.

[403] *Ibid.*

[404] (Gose and Gipple, 2012).

[405] (Piff, Kraus, Keltner, Côté and Hayden Cheng, 2010).

[406] Quoted in (Gose and Gipple, 2012).

[407] (Macdonald, 2011).

[408] (Owen, 1964), 431.

[409] (Ross and Chapman C, 2013).

[410] (*The Times,* 1911).

[411] (Owen, 1964), 428.

[412] (Owen, 1964), 136.

[413] (Owen, 1964), 98.

[414] *Ibid.*

[415] (Owen, 1964), 228.

[416] (Owen, 1964), 230.

[417] (Owen, 1964), 231.

[418] (Eaton, 2011).

[419] (Thomas Cook, n.d.).

[420] Quoted in (Harrison, 1966), 358.

[421] Speech from 1883, quoted in (Himmelfarb, 1992).

[422] (Jordan, 1959), 149.

[423] (Finlayson, 1994), 51.

[424] (Finlayson, 1994), 97.

[425] *Ibid.*

[426] Quoted in (Waddington, 2000), 30–31.

[427] (Andrew,1989), 97.

[428] *Ibid.*

[429] (Owen, 1964), 97–98.

[430] (Prochaska, 1990), 370.

[431] *Ibid.*

[432] (Finlayson, 1994), 51.

[433] *Ibid.*

[434] Quoted in (Finlayson, 1994), 130.

[435] (Churchill, 1909), 363.

[436] For more on this, see (Davies, 2014).

[437] (Soskis, 2014).

[438] (*The Guardian*, 1891).

[439] (Kirkman Gray, 1908), ix.

[440] (Kirkman Gray, 1908), 4.

[441] (Owen, 1964), 162.

[442] (Kirkman Gray, 1905), 288.

[443] *Ibid.*

[444] (Preston, 2012).

[445] (Serrano, 2007).

[446] (Miller, 2012)

[447] Singer has produced a number of papers exploring the issues that underpin effective altruism, but the classic statement of the original idea is (Singer, 1972).

[448] For more information, see www.centreforeffectivealtruism.org.

[449] For a discussion of one instance of this controversy, see (Davies, 2013).

[450] (de Tocqueville, 1835) 27–28.

[451] (Owen, 1964), 221.

[452] Quoted in (Finlayson, 1994), 135.

[453] (Hobson, 1914), 296.

[454] For instance, the American urban activist and church worker Robert Lupton has criticised what he terms 'toxic charity' for creating dependency amongst beneficiaries. See (Lupton, 2011).

[455] For the classic statement of Malthus views, see (Malthus, 1798).

[456] Quoted in (Owen, 1964), 167.

[457] See (Abramitzky and Braggion, 2003).

[458] For instance, by the outgoing CEO of the Charity Commission in 2014: see (Green, 2014).

[459] (Owen, 1964), 167.

[460] (Owen, 1964), 277

[461] *Ibid.*

[462] *Ibid.*

[463] *Ibid.*

[464] (Owen, 1964), 279.

[465] www.trustforlondon.org.uk

[466] (Beveridge, 1948), 356–380. Beveridge's analysis of charitable trusts builds on the work of the Charity Commissioner Arthur Hobhouse, who had first identified many of these 'horrors' in the 19th century. (Hobhouse, 1868).

[467] Details taken from (Beveridge, 1948) and (Wilson, 1979).

[468] (Beveridge, 1948), 358.

[469] E.g. (nfpSynergy, 2014).

[470] (Harrison, 1966), 363.

[471] (IPSOS MORI, 2014).

[472] A survey by ICM for CAF in 2011 found that members of the public estimated that charities spend 42p to raise every pound of income, and thought that an acceptable amount would be 26p for every pound. Data suggests, however, that the actual figure is closer to 12p for every pound. See (CAF, 2011).

[473] (Owen, 1964), 474.

[474] (Owen, 1964), 475.

[475] (Resource Alliance and Rockefeller Foundation, 2012), 5.

[476] (Bank of America and Center on Philanthropy at Indiana University, 2012), 47.

[477] (Kasper and Marcoux, 2014).

[478] (Owen, 1964), 402.

[479] (*The Spectator,* 1886).

[480] *Ibid.*

[481] *Ibid.*

[482] *Ibid.*

[483] Quoted in (Owen, 1964), 408.

[484] (Owen, 1964), 402.

[485] Quoted in (Andrew, 1989), 21.

[486] (Wilde, 1909), 3–4.

[487] (Žižek, 2009).

[488] (Harrison B, 1966), 370.

[489] (Godwin, 1797), 800.

[490] (Wilde, 1909), 9.

[491] (Kirkman Gray, 1905), 269–270. The reference in the quote is to (Alcock, 1752).

[492] (Prochaska, 1990), 375.

[493] (Owen, 1964), 481–482.

[494] (Prochaska, 1990), 375.

[495] (Owen, 1964), 481–482.

[496] (Prochaska, 1990), 375.

[497] (Rodgers, 1949), 8.

[498] (Prochaska,1980), 124.

[499] (Harrison, 1966), 360.

[500] Quoted in (Harrison, 1966), 367.

[501] (Nasaw, 2006).

[502] (Gentilucci, 2014b).

[503] (Owen, 1964), 397.

[504] *Ibid,*

[505] (Owen, 1964), 401.

[506] (*The Times*, 1857).

[507] (*The Times*, 1840).

[508] For instance (Chorley, 2014).

[509] For further details see (International Association for Scottish Philosophy, n.d.).

[510] Quoted in (Owen, 1964), 27.

[511] (Petrosino, Turpin-Petrosino, Hollis-Peel and Lavenberg, 2002).

[512] (Yu, 2014).

[513] (Owen, 1964), 324.

[514] (Owen, 1964), 325.

[515] (*The Times,* 1926).

[516] (Thomas Dolby Publisher, 1825), 111.

[517] (*The Times*, 1926).

[518] See (Gousmett, 2009).

[519] (Buffett, 2013).

[520] (Bernard Shaw, 1907).

[521] (*The Guardian,* 1997).

[522] *Ibid.*

[523] For a detailed discussion of the 'tainted money' affair and its relevance to modern debates about philanthropy see (Soskis, 2014).

[524] For further discussion of the ethical and practical issues facing charities confronted with a 'tainted donation' see (Davies, 2011).

[525] (Nasaw D, 2006).

[526] (Malkin, 2007).

[527] The 'Shared Value' concept, developed by Harvard academics Michael Porter and Mark Kramer, aims to take this notion even further by arguing for a new understanding that puts business success and social progress on an equal footing and contends that the two are mutually reinforcing. See (Porter and Kramer M, 2011). Some large companies such as Nestle have even started adopting a 'Shared Value' approach to their business: www.nestle.com/csv

[528] (Owen, 1964), 434.

[529] (Owen, 1964), 434–435.

[530] (Owen, 1964), 435.

[531] *Ibid.*

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The History of Philanthropy | University of Kent Special Collections & Archives

This blog from our Centre for Philanthropy colleague and Pears Fellow, Rhodri Davies, first appeared as panels in the 'Exploring Philanthropy' exhibition in the Templeman Gallery in 2022.

Read on as Rhodri takes you on a whistle stop tour of the history of philanthropy!

How do we define "Philanthropy"?

"Philanthropy" is one one sense simple to define: it literally means "love of humanity". Yet what this means in practice has proven far more difficult to pin down. The historian Benjamin Kirkman Gray argued in his 1905 book *A History of English Philanthropy* that philanthropy is "probably incapable of strict definition", and many modern academics and practitioners would agree that it is an "essentially contested term".

Part of the challenge is that the meaning of philanthropy has shifted considerably over time. Following its emergence in Ancient Greece (where it had a meaning significantly different to our modern understanding), the word philanthropy largely disappeared for more than a thousand years, when it was replaced by Judeo-Christian notions of "charity" and "almsgiving". It finally re-emerged in something like its modern form in the 18th century, first in France and then in England, where it was used to refer to the prison reformer John Howard – a man who has been called "the first modern philanthropist".

A key milestone in the emergence of the modern conception of philanthropy was the introduction in 1601 of the Statute of Charitable Uses. This did not, as it has sometimes been claimed, introduce a legal definition of charity; but its preamble did enumerate for the first time a list of purposes which could acceptably be deemed as 'charitable'. (A list that borrowed heavily from William Langland's 14th century dream poem *Piers Plowman*). This strengthened the notion of philanthropy as something that was concerned with secular problem solving, and laid the foundations for the definition of charity that we still use in the UK to this day (and, indeed, in many other places whose common law has followed our own).

We might assume a link between philanthropy and giving money, but this has not always been the case. Many of the celebrated "philanthropists" of the 18th century were men like John Howard or William Wilberforce, whose primary tools were campaigning and political influence. It was only in the 19th century, during the Victorian era, that philanthropy gradually came to be more associated with the idea of wealthy individuals giving money. This was cemented in the late 19th and early 20th century with the emergence in the USA of a new breed of ultra-wealthy industrialists like Andrew Carnegie, John D Rockefeller and J. P. Morgan – who were vilified by some as "robber barons", but were celebrated by others for the scale of their giving. These Gilded Age mega-donors established a new template that continues to shape our understanding of philanthropy even today.



Credit: John Howard bringing water and fresh air into a prison in order to improve the conditions for the inmates. Watercolour. Wellcome Collection: https://wellcomecollection.org/works/kp2dxsex

Religion and Secularisation

The relationship between religion and philanthropy is deep and long-standing. For a long time the two were inextricably linked, as virtually all giving was guided by religious teaching and done via religious institutions. However, the Reformation in 15th Britain – which saw a schism between Catholicism and Protestantism following the decision of Henry VIII to leave the Church of Rome – together with the rise of a new form of secular humanism in continental Europe during the 16th century (epitomised by figures such as Erasmus) eventually paved the way for a new secular conception of philanthropy that was distinct from the religious almsgiving of medieval times.

This secularisation was a very slow process, however; and religious teaching continued to play a major part in motivating and shaping philanthropy for a long time. Protestant preachers and

writers in the 15th and 16th centuries, keen to find new ways to distinguish their religion, often caricatured Catholic giving as "superstitious" and derided it as inferior to their own brand of "worldly" philanthropy. The poet John Donne, for instance, claimed that:

"*There have been in this kingdome, since the blessed reformation of religion, more publick charitable works perform'd, more hospitals and colleges erected and endowed in threescore, than in some hundreds of years of superstition before.*"

The secularisation of philanthropy only really took root with the advent of the enlightenment in the 17th and 18th centuries, when the arguments of influential thinkers like Mary Wollstonecraft, Emmanuel Kant and Thomas Paine led to the emergence of new views on the interplay of rights, responsibilities, charity and justice in our society.

The link between religious identity and philanthropy remained important for many, however. This was particularly true of minority groups, for whom systems of mutual aid and charity were often vital because they were excluded from the support that mainstream society offered. This was the case for the many dissenting groups of Protestants- including most notably, perhaps, the Quakers; whose willingness to combine commercial success with a strong habit of giving saw them produce many celebrated philanthropic families such as the Cadburys and the Rowntrees. It was also true of Britain's Jewish community, which likewise gave rise to many significant philanthropists like Frederick David Mocatta and Baron Maurice de Hirsch.

Religion remains an important element of philanthropy to this day. Many donors, at all levels, would still cite religious belief as a key factor that motivates and informs their giving; even if the causes they focus on and the approaches they use reflect our more secular modern understanding of philanthropy.


GEORGE CADBURY.

Credit: George Cadbury, from Stead, H.F., How Old Age .... Wellcome Collection. https://wellcomecollection.org/works/nsq63wc6 Attribution 4.0 International (CC BY 4.0)

Campaigning and Reform

When trying to define the difference between charity and philanthropy, a distinction is sometimes drawn between addressing the symptoms of society's problems and addressing their underlying causes: with the argument being that the former typifies charity while the latter typifies philanthropy. This is perhaps too simplistic, but it does reflect a fundamental truth about the history of philanthropy: that campaigning and advocacy designed to bring about social change has long been just as important as addressing issues through the direct provision of services.

When "philanthropy" started being used in its modern form in the 18th century it was primarily applied in the context of campaigning; to figures like the anti-slavery advocate William Wilberforce or the prison reformer John Howard. And even as philanthropy increasingly came to be associated with the giving of money, efforts to drive fundamental social change rather than merely alleviate immediate suffering remained equally important.

Philanthropy has often played a particularly important role in the early stages of campaigning for new rights or freedoms, because it can provide vital support for marginalised groups and causes that have little or no public recognition at that point. Over time, further resources can be drawn in and new public and political support developed, resulting in the cause in question being brought from the margins into the mainstream and – in many cases – resulting in changes in policy and legislation. Following this template, philanthropy has helped to secure many major milestones of social progress that we now take for granted; from the abolition of slavery and the prohibition of child labour, to universal suffrage and the decriminalisation of homosexuality.

This has, of course, been far from easy. At the core of philanthropy's role in attempting to drive social change there is often a tension between incrementalism and radicalism: between those who feel that the only pragmatic option is to work with existing systems, and those who feel that those very structures need to be torn down for real change to occur. Sometimes this tension has been a positive one; bringing both sides towards a middle ground that makes it possible to achieve real change. At other times, however, the tension between incrementalism and radicalism has proved too much and seen movements splinter.

There has also been sustained criticism of the campaigning role of philanthropy. The then-Chief Charity Commissioner wrote in 1979 that "The role of the charity is to bind up the wounds of society…to build a new society is for someone else", and charities are still regularly told by politicians to "stick to their knitting" and "stay out of politics". Often part of the rationale for doing so is a suggestion that charitable campaigning somehow represents an unwelcome new development. However, it is clear from history that this is far from true and that campaigning has in reality always been a vital tool for philanthropists in driving social change.

Philanthropy and Business

Philanthropy and business are sometimes presented as if they are entirely separate from one another, but in reality the lines between making money and giving it away have often been distinctly blurred throughout history, as people have found novel ways to combine profit and purpose.

As far back as 1361, on his death from plague, the Bishop of London Michael Northburgh left 1,000 silver marks to establish a fund in old St Paul's Cathedral that would not make grants, but rather offer interest-free loans on pawned objects, which had to be repaid within one year or the goods would be sold.

In the late 17th century, meanwhile, the London merchant Thomas Firmin set up a number of projects "for the imploying of the poor", where he ran deliberately loss-making businesses in which spinners and weavers were paid well above the going market rate. It was said that he viewed these projects as "thrifty philanthropy rather than ordinary business". The desire to combine business and philanthropy was in fact so widespread in the 18th century that the

merchant James Hodges lamented:

"Any proposals for publick benefit, at the expense of private purses, without any visible return, must probably make but a small progress"

One group notable for combining business with philanthropy were the Quakers. Many big name companies and brands that still exist to this day have their roots in Quaker-owned family companies; e.g. Cadburys and Rowntrees in the world of confectionery or Barclays and Lloyds TSB in the world of banking. Figures like Elizabeth Fry, George Cadbury and Joseph Rowntree became renowned for their giving and social campaigning; which was often inextricably linked to their commercial activities.

The creation of new accommodation and facilities for employees and their families was a prominent focus for the philanthropy of Quakers as well as other business leaders. Cadbury created the model village of Bournville to house his workers; likewise Joseph Rowntree had New Earswick, Titus Salt had Saltaire and William Lever built Port Sunlight, among others. These new villages combined decent quality housing with suitably-improving leisure amenities such as museums and gardens, and were vastly superior to the majority of the cramped housing found in larger urban areas at the time. In many cases, however, this came at the price of additional controls on the lives of workers- such as the prohibition of alcohol or the introduction of curfews.

Housing was also the focus of a different business-informed approach to philanthropy known as "percentage philanthropy" (or "4 per cent philanthropy"). This was where donors like Octavia Hill and Edward Guinness would build decent-quality affordable housing in urban areas and then charge the working classes below-market rents to live in them, so the properties would deliver some financial return and the discount would be seen as the philanthropic element.

Today there is a growing trend towards "social enterprise" or "social investment" approaches that seek to combine social and financial return. Often this is presented as an unprecedented new innovation, but in fact it is clear that there is a rich history stretching back many years of people finding ways to bring business and philanthropy together.



Credit: Elizabeth Fry. Reproduction of lithograph. Wellcome Collection: https://wellcomecollection.org/works/ghqzazrc

Philanthropy and the Welfare State

From the beginning of the 17th century, when the Tudor government somewhat reluctantly introduced Poor Law legislation, the question of whether responsibility for meeting the welfare needs of citizens should lie with the state or with private philanthropy has been at the heart of political debate for hundreds of years.

Over time, the nature and scale of social problems changed as the UK became industrialised and urbanised, and it became apparent that the State had to step into many areas. But as David Owen, one of the most prominent historians of English philanthropy, notes: The welfare role of

government remained "*largely supplementary, to fill such urgent gaps as might be left by the network of private agencies and to carry out its traditional obligation of relieving the genuinely destitute.*"

However, from the late 19th century into the first half of the 20th century a growing body of thought emerged which saw the State as having a far more central role in providing welfare. This was realised in 1948 with the creation of the National Health Service and the wider welfare state. Philanthropy and charities had played a key role in this story, as almost every element of the welfare state as we know it reflected a need that was first identified and met through philanthropic means, but it was unclear at first what the ongoing role (if any) of philanthropy was to be. As Maria Brenton notes "*a common expectation in those years at the end of the war was that the voluntary sector would just wither away.*"

Some rejoiced at this idea. Labour Health Minister Aneurin Bevan, for instance, derided philanthropy as "a patchwork of local paternalisms" and thought that the move towards centralised state control of healthcare represented clear progress. Others had different views: William Beveridge, one of the key intellectual architects of the welfare state, thought that there would always be a role for philanthropy because:

"Voluntary Action is needed to do things which the State should not do… It is needed to do things which the State is most unlikely to do. It is needed to pioneer ahead of the State and make experiments. It is needed to get services rendered which cannot be got by paying for them."

The dire predictions of those who thought philanthropy had had its day clearly turned out to be incorrect, but the creation of the welfare state did lead to a period of soul-searching in which charities and their supporters were forced to rethink what their role might be. For some organisations this meant repositioning themselves to fill in gaps in state provision. For others it meant challenging the failings of state welfare directly through advocacy and campaigning. As it became clear throughout the 1960s and 70s that universal welfare was not the panacea some had thought, organisations like Shelter and the Child Poverty Action Group emerged to bring new issues of homelessness and poverty to public attention.

The present-day relationship between philanthropy and the welfare state in the UK is complex: in addition to charities filling in gaps in state welfare, or working alongside public sector bodies to enhance state services (as many charities do within the NHS), there are also many charities that deliver services on behalf of the state through grant-funding or contractual arrangements. Perhaps as a result, the desirable balance between state-funded and philanthropic welfare provision continues to be a point of fierce debate in political discourse.

Tainted Donations

Philanthropy has, throughout the ages, generated controversy of various kinds as people object to who is giving, what they are giving to and how they are doing it. Within this controversy there is a notable recurring theme is a belief that some donations are "tainted" by virtue of where they come from because the money being given away was made in ethically dubious ways.

The question then, of course, is whether it is better to accept the gift in the hope of "putting bad money to good uses", or to turn it down in order to avoid tainting oneself. This is a question people have been grappling with for as long as they have been giving to good causes, and opinion has always been divided. In 746, for instance, at the Council of Clovesho (a church synod attended by Anglo-Saxon kings) it was decreed that "*alms should not be given from goods unjustly plundered or otherwise extracted through force or cruelty*".

Likewise in the 19th Century the Quaker philanthropist George Cadbury took a holistic view of wealth: as the historian David Ownen notes, "*making money and giving it away formed for Cadbury a single pattern, and making it could be a constructive socially as giving it away. No amount of philanthropic giving could take the curse of a fortune that had been accumulated*

carelessly or without regard for the welfare of the workpeople who had labored for it."

Others, meanwhile, have argued that the distinction between "good" and "bad" money is unworkable and should therefore not be an impediment to philanthropy: according to George Bernard Shaw:

"practically all the spare money in the country consists of a mass of rent, interest and profit, every penny of which is bound up with crime, drink, prostitution, disease and all the evil fruits of poverty as inextricably as with enterprise, wealth, commercial probity and national prosperity. The notion that you can earmark certain coins as tainted is an unpractical individualist superstition".

And "General" William Booth, founder of the Salvation Army, perhaps expressed it most clearly when he (somewhat apocryphally) said "*the only problem with tainted wealth is t'aint enough of it!"*

Concerns about tainted donations continue to be a major issue for philanthropy. As the UK undergoes something of a reckoning with our national history in the wake of the Black Lives Matter protests in recent years, many organisations – including philanthropic ones – are digging into their own histories to uncover potentially problematic links to slavery and the proceeds of colonialism, and trying to determine the best course of action to take in light of these findings. There are also concerns about current donors: the most notable example in recent years being the Sackler family, whose long-standing philanthropy has become the focus of widespread controversy as a result of their much-criticised role in creating and sustaining the US opioid epidemic.

WORK 3B:

Davies, R. (2024b) *Satire and Philanthropy*. Available at: https://blogs.kent.ac.uk/specialcollections/2024/07/19/satire-and-philanthropy/. (Accessed 5 December 2025). Kent Academic Repository ID: **https://kar.kent.ac.uk/112270/**

Satire and Philanthropy | University of Kent Special Collections & Archives

This blog, by Rhodri Davies, Pears Fellow at the Centre for Philanthropy, was first published as a series of panels in the Exploring Philanthropy exhibition in 2022 in the Templeman Gallery at the University of Kent. The exhibition featured original items from within Special Collections and Archives to support the exhibition as it explored the history of philanthropy, changing perceptions of philanthropy and how philanthropy is carried out today.

The blog is Illustrated with images from within Special Collections and Archives and elsewhere, and highlights some of the ways in which philanthropy has been parodied and mocked throughout history.

Warning: This blog does contain imagery relating to the trade in enslaved people and the differences of opinion in Great Britain at the time about the focus of philanthropy within Great Britain and overseas. See our note on these items at the end of the blog post.

Telescopic Philanthropy

From the mid 18th century until the end of the 19th century, there was a recurring critique of "telescopic philanthropy". This referred to giving that was seen as focussing on the plight of foreigners living in other countries at the expense of addressing pressing issues of poverty and suffering in the UK.

At first this critique was stoked by fears of the French Revolution, and the threat that its radical ideas posed to existing class hierarchies in Britain. In 1798 George Canning, a fervent anti-Jacobin (who subsequently became the UK's shortest-serving Prime Minister), published a satirical poem entitled "New Morality" which mockingly contrasting high-minded "French philanthropy" with good honest "British charity":

"Not she, who sainted Charity her guide,

Of British bounty pours the annual tide:

But FRENCH philanthropy; whose boundless mind

Glows with the general love of all mankind."

Later Charles Dickens immortalised the stereotype of the telescopic philanthropist in the character of Mrs Jellyby in *Bleak House*: so concerned with raising money to support the poor inhabitants of "Booribola-Gha" that she neglects her own children to the point that they are destitute.





Miss Jellyby, etching by Hablot Knight Browne (Phiz), facing p31 in 1853 edition of Charles Dickens, Bleak House. Image scanned by George P Landow on 6th February 2012. Source: http://www.victorianweb.org/art/illustration/phiz/bleakhouse/3.html

There was often a racial element to critiques of telescopic philanthropy, which were tied into opposition to the abolition of slavery. In 1840, for instance, *The Times* reprinted a poem from the satirical magazine *John Bull* which lamented that:

Your thorough-bred philanthropists can glance

Their pitying eyes over Earth's expanse,

Til sorrow all their bosoms discomposes

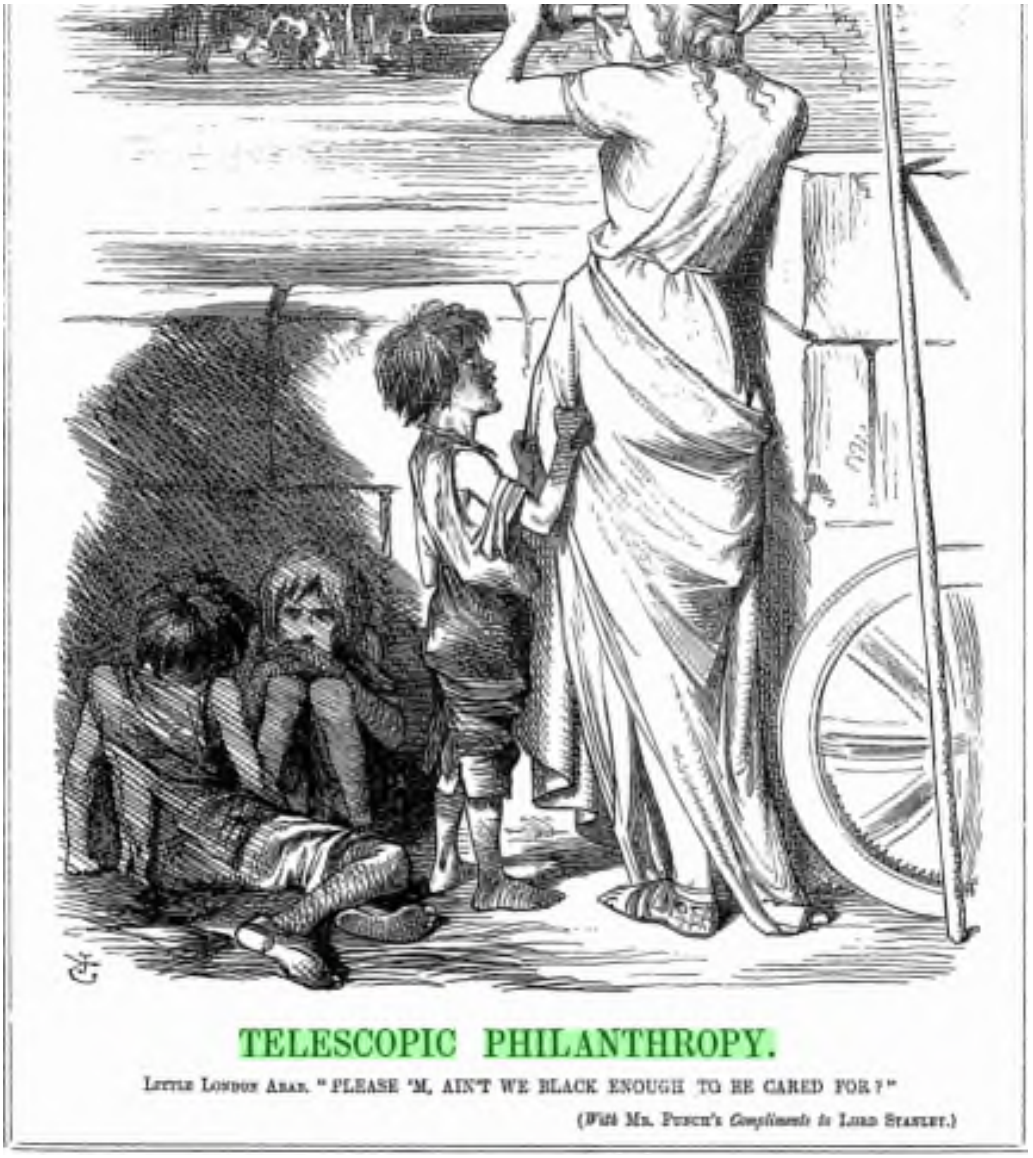
For their black brethren sold to whips and chains;

And not a single sympathy remains

For starving whites who die beneath their noses.

A similar point was captured this Punch cartoon by John Tenniel:





Telescopic Philanthropy – Punch Magazine, March 4th 1865: This engraving by John Tenniel illustrates the concept of 'Telescopic Philanthropy' – a phrase partly popularised by Charles Dickens in his description of Mrs Jellyby in Bleak House. In the engraving, Tenniel represents this concept by depicting Britannia with a telescope, her sights fixed on the horizon and the poor and enslaved people overseas, but ignoring the poor children of Great Britain who are pulling at her robes to attract her attention. The subject of the engraving references an argument made by Lord Stanley in Parliament in 1865 to disband the West Coast Africa Squadron. The West Coast Africa Squadron was a naval unit formed to prevent slave trading on the West African coast. Lord Stanley felt that Great Britain should concentrate on their own white neglected poor, rather than the Black poor and enslaved people in Africa. (Caption by Beth Astridge, University Archivist, University of Kent)

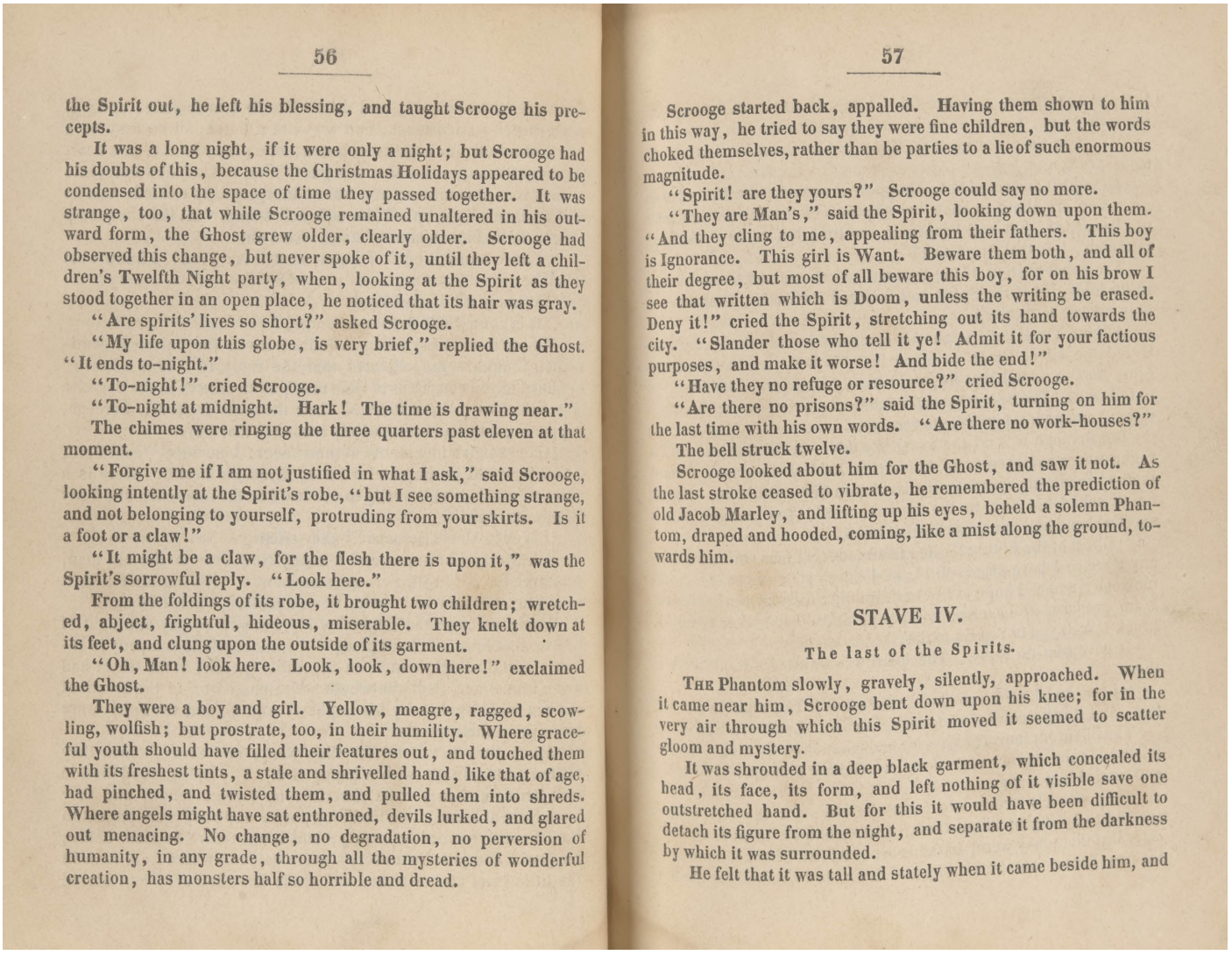
Few today talk of "telescopic philanthropy", but the legacy of these critiques can still be seen in the rhetoric of those use arguments that "charity should begin at home" to criticise international aid and development spending, or to attack the RNLI for saving the lives of migrant people attempting to cross the English Channel.

Mocking the Uncharitable

Those who do not give to charity despite having the means to do so have long been a prime target for satirists.

The most famous example is undoubtedly the character of Ebeneezer Scrooge in Charles Dickens's "A Christmas Carol". Scrooge's response when approached by charity collectors about donating to a Christmas fund "to buy the Poor some meat and drink and means of warmth" is to ask "Are there no prisons?... And the Union workhouses- are they still in operation?" He then has these exact words thrown back at him by the Ghost of Christmas Present and eventually sees the error of his ways.

A first edition copy of Charles Dickens, A Christmas Carol, (1846) was on display in the Templeman Gallery as part of the exhibition open at page shown here:



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the Spirit out, he left his blessing, and taught Scrooge his precepts.

It was a long night, if it were only a night; but Scrooge had his doubts of this, because the Christmas Holidays appeared to be condensed into the space of time they passed together. It was strange, too, that while Scrooge remained unaltered in his outward form, the Ghost grew older, clearly older. Scrooge had observed this change, but never spoke of it, until they left a children's Twelfth Night party, when, looking at the Spirit as they stood together in an open place, he noticed that its hair was gray.

"Are spirits' lives so short?" asked Scrooge.

"My life upon this globe, is very brief," replied the Ghost. "It ends to-night."

"To-night!" cried Scrooge.

"To-night at midnight. Hark! The time is drawing near."

The chimes were ringing the three quarters past eleven at that moment.

"Forgive me if I am not justified in what I ask," said Scrooge, looking intently at the Spirit's robe, "but I see something strange, and not belonging to yourself, protruding from your skirts. Is it a foot or a claw!"

"It might be a claw, for the flesh there is upon it," was the Spirit's sorrowful reply. "Look here."

From the foldings of its robe, it brought two children; wretched, abject, frightful, hideous, miserable. They knelt down at its feet, and clung upon the outside of its garment.

"Oh, Man! look here. Look, look, down here!" exclaimed the Ghost.

They were a boy and girl. Yellow, meagre, ragged, scowling, wolfish; but prostrate, too, in their humility. Where graceful youth should have filled their features out, and touched them with its freshest tints, a stale and shrivelled hand, like that of age, had pinched, and twisted them, and pulled them into shreds. Where angels might have sat enthroned, devils lurked, and glared out menacing. No change, no degradation, no perversion of humanity, in any grade, through all the mysteries of wonderful creation, has monsters half so horrible and dread.

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Scrooge started back, appalled. Having them shown to him in this way, he tried to say they were fine children, but the words choked themselves, rather than be parties to a lie of such enormous magnitude.

"Spirit! are they yours?" Scrooge could say no more.

"They are Man's," said the Spirit, looking down upon them. "And they cling to me, appealing from their fathers. This boy is Ignorance. This girl is Want. Beware them both, and all of their degree, but most of all beware this boy, for on his brow I see that written which is Doom, unless the writing be erased. Deny it!" cried the Spirit, stretching out its hand towards the city. "Slander those who tell it ye! Admit it for your factious purposes, and make it worse! And bide the end!"

"Have they no refuge or resource?" cried Scrooge.

"Are there no prisons?" said the Spirit, turning on him for the last time with his own words. "Are there no work-houses?"

The bell struck twelve.

Scrooge looked about him for the Ghost, and saw it not. As the last stroke ceased to vibrate, he remembered the prediction of old Jacob Marley, and lifting up his eyes, beheld a solemn Phantom, draped and hooded, coming, like a mist along the ground, towards him.

STAVE IV.

The last of the Spirits.

The Phantom slowly, gravely, silently, approached. When it came near him, Scrooge bent down upon his knee; for in the very air through which this Spirit moved it seemed to scatter gloom and mystery.

It was shrouded in a deep black garment, which concealed its head, its face, its form, and left nothing of it visible save one outstretched hand. But for this it would have been difficult to detach its figure from the night, and separate it from the darkness by which it was surrounded.

He felt that it was tall and stately when it came beside him, and

Charles Dickens – A Christmas carol in prose; The Chimes, The cricket on the hearth. Leipzig: Bernhard Tauchnitz, 1846. [A Christmas carol is dated 1843]: Charles Dickens (1812-1870) first published his short story as a stand-alone publication in 1843. A Christmas Carol tells the story of Ebenezer Scrooge, a grumpy elderly miser who is visited by the ghost of his former business partner Jacob Marley, and then by ghosts of Christmas Past, Christmas Present and Christmas Yet to Come. The ghosts show him visions of his life and others around him, including his clerk, Bob Cratchit and his poor family. Scrooge learns that joy has little to do with wealth and becomes a different person after his ghostly visitations. Dickens was passionate about social action and this story was inspired by visits to tin mines and a Ragged School where he witnessed society's treatment of poor children. The story conveys his social concerns about poverty and injustice and enabled this message to be read by a wide audience. Classmark: PD4557.C4 SPEC COLL DICKENS.

[caption written by Beth Astridge, University Archivist, University of Kent]

A 1901 cartoon from the American satirical magazine *Puck* entitled "The Crabbed Millionaire's Puzzle" makes a similar point about the dangers of miserliness. An elderly and glum-faced Scrooge-like figure sits atop a huge pile of money, surrounded by a crowd of people clearly holding out their hands and asking for donations. The caption reads "If I had begun earlier I might have had some fun in giving it away. Now I must leave it either to relatives whom I hate or to churches and colleges in which I have no interest!"



Pughe, J. S. , Artist. The crabbed millionaire's puzzle / J.S. Pughe. , 1901. N.Y.: J. Ottmann Lith. Co., Puck Bldg., August 7. Photograph. https://www.loc.gov/item/2010651452/.

Making fun of the uncharitable has continued to be a recurring (if occasional) motif in satire. A 1972 sketch for *Monty Python's Flying Circus* entitled "The Merchant Banker" saw John Cleese play a caricature of a rapacious capitalist banker. When asked by Michael Palin's timid charity collector to give a pound, Cleese's character at first assumes it is a tax dodge. When told that it isn't, he is unable to understand what is being asked of him, saying "I don't want to seem stupid but it looks to me as though I'm a pound down on the whole deal…?" The payoff to the sketch is that the banker decides charitable fundraising sounds like a great new way to get money out of people for nothing, and despatches the charity collector through a trapdoor in his office floor.

Whilst we find humour in these characters' lack of charity and justifications for being miserly, there is perhaps also an element of discomfort; as we are reminded of times that we ourselves have been too caught up in our own affairs to think about helping others, or when we have let cynicism about human nature creep in and become an excuse not to give.

Self Regard and Ego

Those who engage in philanthropy, but are suspected of doing so merely for social status or to burnish their own ego have often been held up for ridicule by satirists.

Some of the most famous philanthropists throughout history have found themselves mocked along these lines. A 1903 cartoon for the US satirical magazine *Puck*, for instance, entitled "A Word to Grand Stand Specialists" , depicts Andrew Carnegie and John D. Rockefeller piling bags of money at the base of a statue labelled "fame", in front of a backdrop of libraries and universities, Meanwhile the impish character of Puck tries to direct their attention towards a home for consumptives and says to them "*You have qualified thoroughly as modern philanthropists, now why not do some good?*"

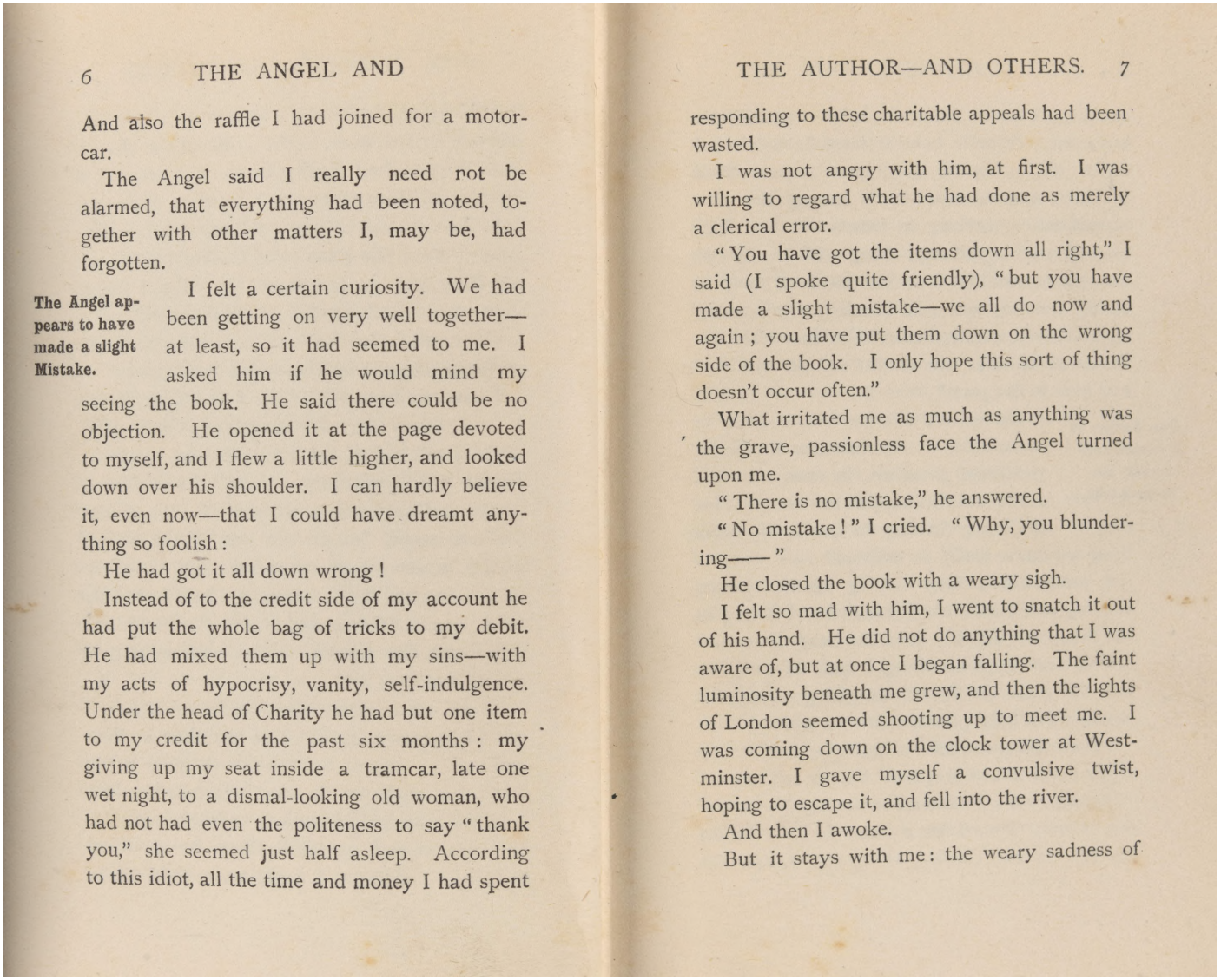


Ehrhart, S. D. , Approximately , Artist. A word to grand stand specialists / Ehrhart. , 1903. N.Y.: J. Ottmann Lith. Co., Puck Bldg., June 3. Photograph. https://www.loc.gov/item/2010652271/.

In a 1908 short story entitled "The Angel and the Author" the writer and humorist Jerome K Jerome tells the tale of a wealthy, self-absorbed man who has a dream that he met an angel whose job it is to go around and record everyone's good deeds so that they can be taken into account when that person arrives at the Pearly Gates and are assessed for entry into Heaven. The Author is at first delighted, assuming that he will be assessed favourably, but the reader quickly gets the idea that many of his so-called "charitable" acts are more for his own benefit than anyone else's and that the Angel is counting many of them in the negative rather than positive column.

A first edition copy of Jerome K Jerome's The Angel and the Author (1908) was on display in the

Templeman Gallery as part of the exhibition open at this page:



6 THE ANGEL AND

And also the raffle I had joined for a motor-car.

The Angel said I really need not be alarmed, that everything had been noted, together with other matters I, may be, had forgotten.

The Angel appears to have made a slight Mistake.

I felt a certain curiosity. We had been getting on very well together—at least, so it had seemed to me. I asked him if he would mind my seeing the book. He said there could be no objection. He opened it at the page devoted to myself, and I flew a little higher, and looked down over his shoulder. I can hardly believe it, even now—that I could have dreamt anything so foolish:

He had got it all down wrong!

Instead of to the credit side of my account he had put the whole bag of tricks to my debit. He had mixed them up with my sins—with my acts of hypocrisy, vanity, self-indulgence. Under the head of Charity he had but one item to my credit for the past six months: my giving up my seat inside a tramcar, late one wet night, to a dismal-looking old woman, who had not had even the politeness to say "thank you," she seemed just half asleep. According to this idiot, all the time and money I had spent

THE AUTHOR—AND OTHERS. 7

responding to these charitable appeals had been wasted.

I was not angry with him, at first. I was willing to regard what he had done as merely a clerical error.

"You have got the items down all right," I said (I spoke quite friendly), "but you have made a slight mistake—we all do now and again; you have put them down on the wrong side of the book. I only hope this sort of thing doesn't occur often."

What irritated me as much as anything was the grave, passionless face the Angel turned upon me.

"There is no mistake," he answered.

"No mistake!" I cried. "Why, you blundering——"

He closed the book with a weary sigh.

I felt so mad with him, I went to snatch it out of his hand. He did not do anything that I was aware of, but at once I began falling. The faint luminosity beneath me grew, and then the lights of London seemed shooting up to meet me. I was coming down on the clock tower at Westminster. I gave myself a convulsive twist, hoping to escape it, and fell into the river.

And then I awoke.

But it stays with me: the weary sadness of

Jerome K Jerome – The Angel and the Author, and others. London: Hurst and Blackett Limited (1908): The Angel and the Author – and others, was a series of twenty essays by Jerome K Jerome in 1908. Jerome Klapka Jerome was born in Walsall on 2nd May 1859. He was an English writer and humourist, and was best known for his comic book 'Three Men in a Boat', published in 1889. The first essay in the volume, titled The Angel and the Author, satirises those whose giving is not entirely selfless. The story describes a man who dreams he has died, shortly after Christmas, and goes up to meet the "Recording Angel". He recounts many of his good deeds such as: "I have been to four charity dinners," I reminded him; "I forget what the particular charity was about. I know I suffered the next morning. Champagne never does agree with me." The man asks the Angel if all these deeds are noted in his book. The Angel confirms that they are indeed recorded. The man then sees that the Angel has written them in the wrong column – mixing them up with his sins. The Angel wearily assures him that there is no mistake. The man wakes and wonders what he could have done differently. "Would I have done better, had I taken the money I had spent upon these fooleries, gone down with it among the poor myself, asking nothing in return." Classmark: PR4825.J3 JER SCR.

[caption written by Beth Astridge, University Archivist, University of Kent]

Although we can laugh at examples mocking the vainglorious efforts of big donors to use their gifts to gain social status, there may also be a slight edge of discomfort for many of us if we suspect that we have been guilty of the same failings in our own way. Whilst most of us will not have the option

of getting a museum or hospital wing named after us, in a smaller way do we still sometimes use our giving and generosity to burnish our own self-image and the image we present to others? And whilst this has always been the case to some extent, has the advent of social media – with its pressures to present an unrealistic, idealised version of ourselves to the world – amplified the temptation for all of us to use charity in this way?

Disagreeable Do-gooders

Even when philanthropists are motivated by the "right" things, the way in which they go about their business can still rub people up the wrong way. Hence there is a rich seam of satire that pokes fun at various forms of "do-gooder", whose methods leave those who encounter their generosity feeling less than well-disposed.

W. S. Gilbert (Of Gilbert and Sullivan fame) captured this beautifully in a verse from his *Songs of a Savoyard* entitled "The Disagreeable Man", which paints a vivid picture of a priggish do-gooder whose motives are not in question but whose approach alienates all around him:

"If you give me your attention, I will tell you what I am:

I'm a genuine philanthropist – all other kinds are sham.

Each little fault of temper and each social defect

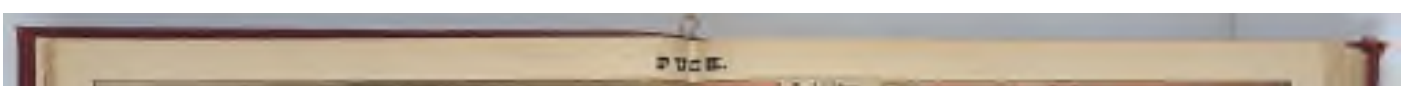
In my erring fellow creatures, I endeavour to correct."

Charles Dickens often took aim at busybody do-gooders. Mrs Pardiggle in *Bleak House* is depicted as a philanthropist, but one who takes a particularly patronising approach in her interactions with the poor. She represents an archetype of the fashion for "home visitation", which Dickens's audience would have been very familiar with, which involved women from the middle classes going into the houses of poor families and subjecting them to a mixture of charitable support and moralistic browbeating.

In an 1851 essay entitled "Whole Hogs", Dickens also poked fun at inflexible social reformers and philanthropic campaigners who refuse to compromise in the pursuit of their goals:

"It has been discovered that mankind at large can only be regenerated by a Tee-total society, or by a Peace Society, or by always dining on Vegetables. It is to be particularly remarked that either of these certain means of regeneration is utterly defeated, is so much as a hair's-breadth of the tip of either ear of that particular Pig be left out of the bargain."

This sort of moral absolutism was also mocked in an 1881 Puck magazine cartoon entitled "The Gentler Sex- Charity for the Drunken Brother, Contempt for the Unfortunate Sister". It depicts a group of female temperance campaigners holding up a drunken man in the street while they talk to him about their abstinence pledge; meanwhile behind them a young mother holding a baby is being thrown out of a women's home onto the street.





Wales, James Albert, Artist. The gentler sex – charity for the drunken brother, contempt for the unfortunate sister / J.A. Wales. , 1881. N.Y.: Published by Keppler & Schwarzmann. Photograph. https://www.loc.gov/item/2012647287/.

Grand "Philanthropy" at the Expense of Charity

One notable criticism of philanthropy throughout history has been that too often those doing it get caught up in grand schemes and utopian visions, which lead them to lose sight of the consequences of their actions or the need for basic human kindness.

The 1843 *Punch* magazine illustration "Substance and Shadow" depicts an art gallery in which hungry and ragged children are trying to get the attention of well-dressed adults, who are too engrossed in looking at the exhibition to notice them. The scene is meant to depict a national exhibition which the Government of the day organised, and which drew *Punch*'s ire on the grounds that such expenditure was grotesque when levels of child poverty were so stark. An accompanying satirical editorial witheringly pretended to commend the government's decision:

"We conceive that Ministers have adopted the very best means to silence this unwarrantable outcry. They have considerately determined that as they cannot afford to give hungry nakedness the substance which it covets, at least it shall have the shadow… The poor ask for bread, and the philanthropy of the State accords – an exhibition."

An 1843 edition of "Punch; or The London Charivari" magazine – showing Cartoon No 1: Substance and Shadow – was on display for the Exhibition in the Templeman Gallery:





Substance and Shadow – Punch Magazine, 1843: Punch; or, The London Charivari, was a British satirical magazine published between 1841-1992. Founded by Henry Mayhew and Ebenezer Landells, in 1843 it established the term 'cartoon' as we now know it – referring to a humorous illustration or pictorial satire. The cartoon, by John Leech, titled "Cartoon – No 1 – Substance and Shadow" depicts the picture gallery in Westminster Hall and shows poor and ragged children and adults visiting the gallery. The people do not look like they are enjoying the experience of looking upon pictures of 'high society' with lives and experiences so different from their own. Leech is satirising the insensitivity of government spending on an exhibition when poverty was such a huge problem. "The poor ask for bread, and the philanthropy of the State accords – an exhibition". (Caption by Beth Astridge, University Archivist, University of Kent)

In his 1848 cartoon "The Universal Philanthropist", the famed cartoonist George Cruikshank took more direct aim at individual philanthropists who let their grand schemes for social reform get in the way of more basic human charity. The cartoon shows a well dressed gentleman aiming a kick at a poor family who cower to get out of his way. The father of the poor family is saying "*Please Sir, bestow your charity for we are starving!*", to which the philanthropist angrily responds "*Interrupting me…at a moment when I am perfecting a grand benevolent plan f Universal Brotherhood and Community of Goods, for the amelioration of the whole Human Race! Why you ungrateful wretch, get out of my house and learn to love your benefactors!*"

The idea that grandiose philanthropy can sometimes be contrasted unfavourably with the need for more immediate human charity has often been particularly keenly-felt at Christmas. In the 1900 *Puck* magazine cartoon "A Christmas Sermon", the character of Puck stands on a stage in front of a crowd of many of the wealthiest and best-known donors of the day (including Andrew Carnegie, J. D. Rockefeller, J. P. Morgan and Cornelius Vanderbilt), holding a plan for a "model tenement" and pointing the audience's attention towards a picture showing the current state of slum housing.

Puck exhorts his audience:

"Here is something for you generous millionaires to think about, when you are endowing schools, colleges and libraries. A chance to learn is good, but a chance to live is better. Your present plan gives more to those that already have much.

Suppose you try giving something to those that have less than nothing. Provide necessities for the poor rather than luxuries for the rich. It is better to give these many thousands a chance to live clean, decent, moral lives than to give a few hundred sons of well-to-do parents a college education. While these horrible conditions exist one model tenement will do more real good than a dozen colleges.

You mean well. Try to do as well as you mean."



Pughe, J. S. , Artist. A Christmas sermon / J.S. Pughe. , 1900. N.Y.: J. Ottmann Lith. Co., Puck Bldg. Photograph. https://www.loc.gov/item/2010651359/.

Philanthropic Hypocrisy

Hypocrisy always attracts satire. In the case of philanthropy, this has most often been seen in critiques that the ways in which donors have made their money are at odds with their efforts to do good through philanthropy. This ties into a wider critique of "tainted donations" i.e. the idea that some money is so ethically problematic or "bad" that it is impossible to do good through giving it away.

The heyday of satirising tainted donations was in the early 20th century US "gilded age", when the

debate became a mainstream political and social issue thanks to a controversy in 1905 over whether the American Board of Commissioners for Foreign Missions should accept a large donation from J. D. Rockefeller. Mark Twain, for instance, wrote a letter to *Harper's Weekly* in the guise of Satan (entitled "A Humane Word From Satan") which began:

"*Dear Sir and Kinsman – Let us have done with this frivolous talk. The American Board accepts contributions from me every year: then why shouldn't it from Mr. Rockefeller…?*"

G.K. Chesterton, meanwhile, penned an article entitled "Gifts of the Millionaire" in which he poured eloquent scorn on Rockefeller's philanthropy, arguing that it was nothing more than the latest in a long line of attempts to buy absolution through giving. Chesterton famously opened the article by declaring that:

"*Philanthropy, as far as I can see, is rapidly becoming the recognisable mark of a wicked man*".

Many cartoonists have also taken aim at tainted donations. A 1905 cartoon called "Puck's inventions" picked up on the aforementioned scandal over the tainted donations of J. D. Rockefeller, depicting Rockefeller himself on a ladder, feeding coins into a giant machine labelled "Patent Disinfector" which then come out of a chute labelled "Purified Cash For Missions".





Ehrhart, S. D. , Approximately , Artist. Puck's inventions / Ehrhart. , 1905. N.Y.: J. Ottmann Lith. Co., Puck Bldg. Photograph. https://www.loc.gov/item/2011645691/.

Another *Puck* cartoon from 1911 entitled "A phase of our tax system – the greater the service, the heavier the tax" depicts two charity workers addressing an oversized man sitting on a throne (presumably a slum landlord), who is taking taking money from a box labeled "Rents" with one hand and putting it into a basket labeled "Organized Charity" with the other, while in the background are run-down tenement buildings.

Concerns about tainted donations continue to be a major source of debate within philanthropy. Scandals such as those surrounding the Sackler family, whose role in the US opioid epidemic has led many to argue that their philanthropy is morally illegitimate, regularly bring the issue back to public attention and raise difficult and long-standing questions about whether it is possible to "do good with bad money" or whether such donations should be refused.

By Rhodri Davies, Pears Fellow, Centre for Philanthropy, University of Kent

[Note: This section of the 'Exploring Philanthropy' exhibition highlighted attitudes to the trade in enslaved people and the differences of opinion in Great Britain at the time about the focus of philanthropy within Great Britain and overseas. Some of the archive material displayed in the exhibition and in this blog reflects these contemporary attitudes and language, and depicts Black people in a racist manner. All such items were displayed in the interests of historical accuracy in relating to describing these differing perspectives, as altering them would risk falsifying the historical record. It would also be problematic to source non-offensive modern equivalents with a similar meaning. These items do not reflect the views or opinions of the University of Kent, Special Collections & Archives or our staff.]

WORK 3C:

Davies, R. (2024c) The History of Fundraising.

Available at:

https://blogs.kent.ac.uk/specialcollections/2024/07/22/history-of-fundraising/. (Accessed 5 December 2025). Kent Academic Repository ID:

https://kar.kent.ac.uk/112271/

History of Fundraising | University of Kent Special Collections & Archives

This blog was originally written in 2022 as part of a series of panels for the 'Exploring Philanthropy' exhibition. The panels were written by Rhodri Davies, Pears Fellow at the Centre for Philanthropy, and have been re-published here to support the Exploring Philanthropy virtual exhibition.

The History of Fundraising

One of the most important factors in motivating people to give is simply being asked, and fundraising has played a crucial role in the history of philanthropy. Throughout the 17th century, one-off national fundraising appeals known as "charitable briefs" were issued in response to specific disasters. These were often fires, which caused huge damage and loss of life in towns and cities around the UK. In 1666, for instance, a charitable brief was issued following the Great Fire of London, which succeeded in raising over £16,000.

It was only with the arrival of new forms of "associated philanthropy" from the late 17th century, however, that we see a greater degree of organisation and the emergence of entities that look something like what we would think of as modern charities. These entities wasted little time in finding ways to drum up support and resources for their causes, and the 18th and 19th century saw a huge amount of growth and innovation in fundraising.

From early on it was recognised that the star power of celebrities was a powerful tool: The Foundling Hospital in London, for example, convinced the artist William Hogarth (with a number of his friends) to paint murals in their building, and also had organ in the hospital chapel donated by the composer George Friedrich Handel; on which he gave a performance of *Messiah* in 1750 that raised £728 for the charity.



Credit: Foundling Hospital, London. Etching by H. Roberts, 1749, after J. Robinson after T. Jacobson. Wellcome Collection. https://wellcomecollection.org/works/zkkcq8hp. Public Domain Image. Titled: This view of the hospital for the reception of exposed and deserted young children erected in pursuance of a Royal Charter granted by his most sacred Majesty King George the 2nd Dated the 17th day of October 1739 is most humbly dedicated to the Governors and Guardians of the said hospital, by their most obedient servant Jeremiah Robinson.

Later on in the 19th century, some well-known charity figures such as Thomas Barnado and "General" William Booth became celebrities in their own right, and would sell memorabilia playing on their fame to

raise money for their organisations; including postcards, plates and teapots bearing their image, and LP recordings of speeches.

The Salvation Army under Booth also pioneered other innovative approaches to fundraising. In 1891, they began selling safety matches under the brand “Lights in Darkest England”; in part to raise awareness about the plight of young women working in match factories who suffered the horrifying condition known as “phossy jaw” due to prolonged exposure to white phosphorus. The Lights in Darkest England matches were made in factories with better pay and working conditions, and were presented to the public in these terms; making them both an early example of “ethical consumerism” and a canny piece of fundraising for the Salvation Army.



Credit: The match factory established by the Salvation Army at Lamprell Street in Old Ford, to the north of Bow, in East London on 11 May 1891. This work is in the public domain: https://commons.wikimedia.org/wiki/File:Salvation_Army_Match_factory.JPG

With the growth and development of fundraising came increasing criticism too; from those who complained that the tactics being used were too aggressive, or that organisations were spending too much on fundraising costs. The *Times*, for instance, lamented in 1880 that:

“*When a name has been printed on a subscription list, its owner becomes a marked man. He has joined, by his own act, the unhappy class to which an appeal can be made with some chance that it will be met. From that day forward his persecution will never cease*.”

Addressing criticisms like these continues to be a challenge for charities today, when competition for limited philanthropic resources is fiercer than ever.

Research and text by Rhodri Davies, Pears Fellow, Centre for Philanthropy

WORK 4:

Davies, R. (2024d) “Good Intent, Or Just Good Content? Assessing MrBeast’s Philanthropy”. *Journal of Philanthropy & Marketing.* Volume29, Issue2, May 2024. Available at: https://doi.org/10.1002/nvsm.1858. Kent Academic Repository ID: **https://kar.kent.ac.uk/105768**

Received: 11 April 2024 | Accepted: 12 April 2024

DOI: 10.1002/nvsm.1858

RESEARCH ARTICLE

WILEY

Good intent, or just good content? Assessing MrBeast's philanthropy

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Abstract

MrBeast is the world's most successful individual YouTube content creator. Having made his name with videos of high-concept challenges and stunts, he has subsequently produced a series of viral videos centring on acts of philanthropy – drawing both praise and criticism in the process. This paper attempts to place MrBeast's approach in the context of wider historical and current debates about the nature and role of philanthropy, in order to ascertain what (if anything) is genuinely novel about it, and how we should understand it in relation to models of philanthropy that have gone before. The paper considers "Beast Philanthropy" through a range of lenses – aesthetic, ethical, economic and political – and what these can tell us about the key questions we should be asking and whether, on balance, we should view this phenomenon positively or not.

KEYWORDS
attention economy, ethics, influencers, philanthropy

Practitioner Points

What is currently known about this subject

- MrBeast is already an important figure in philanthropy. Whilst the amounts of money he has given are relatively modest in comparison to the largest philanthropic foundations or individual donors, they are still sizeable. But even more significant is the reach and influence he has as a result of his huge audience, many of whom are children and young people.
- Awareness of "Beast Philanthropy" among mainstream practitioners is still limited, and there is little understanding of how it may differ from traditional approaches to philanthropy.
- Critical discussion of MrBeast's philanthropy has so far been largely confined to news media, commentary outlets and social media. There has been little consideration of his approach, or the wider phenomenon of influencer philanthropy from an academic persepctive to date.
- As a result, understanding of how MrBeast's approach to philanthropy – and the response it has generated – fits into the wider context of existing debates about the nature and role of philanthropy, is limited.

What your paper adds to this

- This paper outlines the key features of MrBeast's approach to philanthropy, and how these compare to traditional approaches.

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- It also looks at various critical arguments levelled at MrBeast– placing them in the context of existing debates about the nature and role of philanthropy and assessing the extent to which they are justified.
- The paper then considers, in light of these critical arguments, which (if any) aspects of MrBeast's approach to philanthropy we should view positively and which we should view more critically.

The implications of this study and findings for practitioners

- By highlighting the distinctive features of MrBeast's approach to philanthropy and exploring its potential impact, this paper will foster better understanding among existing practitioners (including fundraisers, advisers and nonprofit leaders) of an important, but so far under-studied, phenomenon that potentially has significant implications for their field of practice.
- Relating MrBeast's approach to relevant precedents will help practitioners to take a more informed view of claims that influencer philanthropy is entirely new in nature and poses unprecedented challenges or opportunities.
- The paper places critical arguments levelled at MrBeast's approach to giving in the context of existing debates about the nature and role of philanthropy and attempts to offer a balanced assessment of the extent to which these critical arguments are justified. This will help to inform a more nuanced understanding among practitioners of the potential pros and cons of influencer philanthropy.
- Understanding what is potentially innovative about MrBeast's approach and what is potentially problematic will enable practitioners to think through whether there are implications for their own work in the future.

1 | WHO IS MrBeast?

MrBeast (aka Jimmy Donaldson) is the world's most successful YouTube content creator. His "MrBeast" channel has over 240 million subscribers, making it the most subscribed-to individual user channel on the platform and the second most subscribed-to channel overall (Suggitt, 2022). Across all his channels, his videos have been viewed over 45 billion times. As a result, he has amassed – at the age of only 25 – an estimated net worth of $500 million (Sorvino, 2022). He has also become known for his charitable giving and in particular for his brand of "Beast Philanthropy." This harnesses the aesthetics and economics of social media by producing highly viral videos in which MrBeast performs grandiose (and often outlandish) charitable stunts, and the money generated from these videos through YouTube's AdSense advertising algorithm – as well as through brand sponsorship deals with specific companies – is then used to provide financial resources for further Beast Philanthropy projects (Alexander, 2022; Barker & Cameron, 2023; Miller & Hogg, 2023).

MrBeast's rise to fame and fortune has been meteoric, and many have welcomed the fact he has branched out into philanthropy at such an early age. However, in doing so he has also attracted criticism. The most notable example to date was in early 2023, when a video he posted entitled "1000 Blind People See For the First Time" generated huge controversy – with many deriding it as exploitative "poverty porn" and claiming that MrBeast's purported philanthropy is merely a self-interested attempt to drive clicks and likes rather than genuine altruism (Benton, 2023; Robinson, 2023; Wade, 2023). A similar video entitled "1000 Deaf People Hear For the First time," posted in May 2023, brought further controversy. Some, however, have rushed to MrBeast's defence, claiming that the criticisms of him are unfair, and that we should celebrate the work he is doing rather than lambasting him – particularly when many wealthy people continue to give very little at all (Darby, 2023; Sharma, 2023).

So which is it? Is MrBeast a shining example of a wealthy young person recognising a responsibility to give back and using his skills to shake up existing models of philanthropy? Or is he a performative narcissist, who exploits people suffering from poverty or illness under the guise of being charitable to produce highly lucrative content for his burgeoning social media empire? This article will attempt to unpick the various criticisms that have been made of MrBeast; and by exploring the aesthetic, ethical, economic and political issues raised by his model of giving will seek to clarify what we need to understand if we are to make a measured assessment of him as a philanthropist.

2 | THE ORIGINS OF BEAST PHILANTHROPY

Like comic book superheroes and supervillains, philanthropists usually have origin stories. Many identify a specific incident or an element of their childhood as a starting point for why they started giving, and over time – though repetition and refinement – this becomes a carefully-honed narrative. Since self-analysis of our own motives and behaviours is not always that accurate, these stories may bear little

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relation to the psychological reality of why donors *actually* give; but they can tell us a lot about their self-image and how they perceive their philanthropy.

In MrBeast's case, the standard story is that when he secured his first brand deal (with the NFT marketplace Quidd) he received $10,000 and immediately decided to give the money to a homeless person. As the story is told on the Beast Philanthropy website:

"*In June 2017, when Jimmy Donaldson (AKA MrBeast) received his first YouTube sponsorship deal of $10,000, he wondered, "how can I transform this money into something good?" Not wanting to keep the money for himself, Jimmy agreed to the sponsorship deal with one condition: he was able to give away all the money. The sponsor agreed*" (Beast Philanthropy, n.d.).

This led to the twin realisations that came to underpin his whole model of "Beast Philanthropy": first, that giving money away actually feels good, and secondly that it can be hugely lucrative (if it also feels good/entertaining for those watching, and thus leads to the all-important clicks and likes). We should note that despite MrBeast's apparent enthusiasm for his initial $10,000 gift to a homeless man, he did not go straight from that to a full embrace of philanthropy. Instead, in the short term, he focussed on giving extravagant gifts to his own family members (new cars for his brother and stepfather, $100 K for his mother), massively oversized tips to fast food delivery drivers, and cash donations to randomly-selected Twitch streamers (MrBeast, 2018a). Generous, certainly, but not acts that neatly fit any standard definition of "philanthropy" (e.g., Payton's characterisation of it as "voluntary action for the public good" (Payton, 1988) – since these early MrBeast videos would seem to fall short of the "public good" part).

Over time, MrBeast did start to produce more videos in which he gave money and goods in ways that might be deemed more straightforwardly philanthropic, and eventually in 2020, he launched a dedicated channel for these videos ("Beast Philanthropy"), where all profits are directed to a linked 501(c)(3) non-profit organisation.

3 | THE AESTHETICS OF BEAST PHILANTHROPY

First, we should consider to what extent criticism of MrBeast is driven by distaste for how it looks and feels, rather that substantive concern about what he is doing. It is undoubtedly true, for instance, that some people will not take to the heavily-edited, fast cut style of his videos. Others may find MrBeast's languorous, high-pitched drawl grating rather than endearing. And some will feel that the gaudy, game-show stylings sit uncomfortably with efforts to sound sincere about issues like food poverty or visual impairment. It is important, however – particularly for older viewers who may not be accustomed to this kind of content – not to let generalised distaste for the aesthetics of YouTube get in the way of an even-handed assessment of MrBeast's philanthropy. It is also worth bearing in mind that these aesthetics undoubtedly *work*. You may not like the way the videos look, but MrBeast has an evident talent for knowing what his audience wants; and it is this, combined with a relentless focus on refining his approach to maximise engagement, that has made him so phenomenally successful.

Surface-level concerns about aesthetics may also highlight more substantive issues, of course. Critics who claim that the style of the videos is tonally incongruous with genuine efforts to help people in need may argue that it betrays values that are at odds with them too. There is, for instance, a strong streak of materialism running throughout MrBeast's work, and conspicuous consumption – often to the point of deliberately absurd wastefulness – is the central point of many of his challenges and pranks (Miller & Hogg, 2023). How are we to square this with his promotion of the importance of giving, and his attempts to highlight issues of poverty? Does his donation of $1 million to support foodbanks (MrBeast, 2020) seem less praiseworthy when we recall that he also spent vast amounts of money on filling his friend's house with 10 million Lego pieces (MrBeast, 2019)? Or is the $3 million of aid he reportedly gave to help Ukrainians affected by war (MrBeast, 2022b) somewhat undermined by the knowledge that he also gave 3 million pennies to his 3 millionth subscriber (at a cost of $43,000, which vastly outweighed the actual value of the gift) (MrBeast, 2018b)?

Similarly, the origins of BeastPhilanthropy in pranks and giveaways are evident in the fact that acts of generosity are presented as a thing you do *to* people – preferably as a surprise – rather than something that is done in partnership with them and designed to give them agency. This is perhaps an inevitable consequence of what William Davies calls the "Reaction Economy" (Davies, 2023), where the way in which we react to things is now the basic commodity of the internet. In this case the reactions function on two levels, since the reaction of those receiving the gift (shock, disbelief, gratitude) becomes a crucial element of driving reactions in those watching (likes, clicks, comments). An unfortunate knock-on effect, however, is that this reinforces long-standing concerns about the power dynamics between donors and recipients (Callahan, 2017; Dunning, 2023; Saunders-Hastings, 2022; Shapely, 2000).

But perhaps the overriding aesthetic concern is less about the specific style of the videos and more about the general point they epitomise; namely that this style of philanthropy is unavoidably showy and visible. This plays into a longstanding tension in philanthropy between visibility and anonymity (Schervish, 1994). Some donors want to keep their giving private for religious or cultural reasons, or because they are worried that visibility will open them up to criticism or make them targets for fundraising. Similarly, many throughout history have argued that circumspection in giving is a virtue: the medieval Jewish scholar Maimonides, for instance, delineated 8 "levels of giving" within the tradition of tzedakah (going from best to worst), and the top levels are ones in which neither the giver nor the recipient know each other's identity. (Bremner, 2017).

But if giving quietly is a virtue, it is not one available to MrBeast. His philanthropy is dependent on being highly visible, as it is only through garnering views and likes that his model works. Furthermore, it is not enough simply to be visible; the mode of giving itself also needs to be sufficiently ostentatious to entertain (otherwise no-one would watch).

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One can make a positive case for giving more visibly: on the grounds that this brings greater transparency (and therefore, perhaps, greater legitimacy), or that in being more open about philanthropy a donor can set an example for others to follow. The latter, indeed, is the rationale behind initiatives like the Giving Pledge, which encourage the wealthy to make a public commitment to give away a significant proportion of their wealth in order to establish a new peer-led norm for philanthropic giving (The Giving Pledge, n.d.; Soskis, 2017). Although MrBeast has not made it an explicit part of his aim so far to influence others, he certainly does seem to have had some effect on encouraging his peers (i.e., other YouTubers) to act philanthropically. Of course, whether this is because he is establishing a new philanthropic norm of any kind, or simply because other YouTubers can see this is a good way to make money remains to be seen.

4 | THE ETHICS & MORALITY OF BEAST PHILANTHROPY

From an ethical standpoint, would it be better if MrBeast wasn't engaging in philanthropy at all? In order to believe so, we would need to weigh up the good done through his giving against any potential harms done (e.g., disempowering recipients, infringing their rights, undermining the impetus for structural reform). We would also need to take account of the counterfactual: if MrBeast wasn't making videos about giving what would he be doing instead? And, indeed, what would his audience be *watching* instead? This is important, because even if you are not totally enamoured with MrBeast's videos, in the wider context of content that is available on the internet – for example, the huge (and deeply worrying) popularity and influence of "manosphere" influencers like Andrew Tate among young boys – MrBeast's goofy pranks and challenges may look pretty harmless.

That being said, there are ethical concerns about MrBeast's approach that could be placed in the negative column when it comes to assessing his philanthropy. One is the question of consent: to what extent can the people who appear in his videos be said to be "willing" participants? Given that the entire model is based on capturing unguarded reactions, presumably none of the participants are informed beforehand; but are they subsequently given the option not to appear in the final video? Even if they are, there might be questions about whether any consent is genuinely informed – particularly in some of his more recent videos where participants are not necessarily subscribers to any of his channels and may not be familiar with MrBeast, or with what it means to appear in a viral video. It seems reasonable to assume, given the scale and slickness of his operation these days, that MrBeast has given some thought to this and has measures in place to ensure that consent is sought. However, when it comes to some of the other content creators on YouTube and TikTok who make viral "acts of kindness" videos, concerns have been raised that no such steps are taken (Hunt, 2023; Kumamoto, 2022).

Even for those participants who do consent, we may have reason to be concerned about the ethics of how they are *portrayed* in MrBeast's videos. The problem, in a general sense, is that his recipients are shown as having virtually no agency: they are merely passive actors whose twofold role is to provide a means for him to perform viewer-pleasing acts of generosity, and then to offer suitably effusive and emotional displays of gratitude in response. Presumably, even those who have consented to appear in a video will have little or no say in how they are shown in the final narrative, adding an additional dimension to standard concerns about power dynamics. There is almost always a power imbalance between donors and recipients because the latter are usually competing for scarce resources and the former have the means to provide them (Saunders-Hastings, 2022); but if the donor also exerts almost total control over the medium via which the interaction is shared with a wider audience, then the level of power they hold in relation to recipients is significantly greater. For one thing, the donor can exert an enormous amount of influence over how the nature of recipients' needs is characterised: in the case of the videos in which MrBeast "cures" blindness and deafness, for instance, there is a deliberate framing of both issues as purely medical problems – which lend themselves to clear-cut interventions that can then be presented as 'solutions' (Aquino, 2023). The disability studies scholar Paul K. Longmore argues in his work on the history of charity telethons in the US that these fundraising models adopted a similar approach, simplifying problems with multiple complex and often systemic causes into straightforward cases of medical need that could be 'cured':

> "*Telethons made medical needs the overriding concern of people with disabilities in a system devoid of universal health care and with an unravelling safety net*" (Longmore, 2015).

The same arguments apply to the presentation of poverty in MrBeast's videos, where the challenges faced are distilled down to "needing money" or "needing a car," with little or no acknowledgement of the underlying structural issues that may be keeping someone in poverty. It is possible that this reflects an ideological choice on MrBeast's part, if he believes that the primary role of philanthropy is to provide direct relief to those in need rather than to work further upstream in order to address the underlying causes of their need – although it is far more likely that he has never stopped to think about it. In any case, his hands are tied by the medium within which he operates: it is vital for the success of his model that the philanthropy he shows on film makes for compelling viewing, and this dictates an emphasis on individual interventions and tangible solutions, rather than upstream activities like research or advocacy – which tend to be longer-term and more amorphous in nature, and therefore far less televisual.

There may also be ethical concerns about the role that gratitude plays in MrBeast's videos. The relationship of gratitude to philanthropy is complex: on one hand it is a natural reaction to be grateful to someone when they offer us a perceived kindness; on the other hand, gratitude can be a tool to reinforce uneven power dynamics if it is expected or demanded. Throughout human history, across many cultures, gift giving has played an important role in building and

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maintaining social bonds – by establishing mutual relationships of reciprocity, in which there is an understood expectation that the gift will be returned in kind at some point in the future (Hyde, 2019; Mauss, 2004). When it comes to charitable gifts, this link of direct reciprocity is broken because there is no expectation that the recipient will repay the gift in kind. Instead we need to draw on a notion of generalized reciprocity over a longer time period (i.e., the idea that we give, in part, because we suspect that 1 day we may ourselves be recipients) (Titmuss, 1970). However, gratitude can also be the basis for an alternative form of direct reciprocity: one where there is no expectation that the recipient will ever return the gift in kind, but they *do* need to be appropriately grateful for it. The danger here is that what would count as a sufficient quantity of gratitude is impossible to specify, so a giver who wants to wield power over a recipient can do so simply by accusing them of failing to meet their side of the bargain by "not being thankful enough."

Concerns about the role of gratitude are also tied into a more fundamental question about the nature of philanthropy: is it a choice, or a duty (Martin, 1994; Schneewind, 1996)? In what we have said so far, we have been assuming that philanthropy is a matter of choice on the part of the donor – a voluntary decision to give their private assets away for the public good – to which the appropriate response is gratitude. However, many have argued that philanthropy should instead be seen as a matter of *duty* to at least some extent: something which donors are morally compelled to do by the demands of justice (Ashford, 2018; Cordelli, 2016; Hill, 2018; Singer, 2011). In this case, recipients are entitled to expect, or even demand, resources as a matter of rights; and we should not necessarily expect them to express gratitude (since they are now simply laying claim to something they are rightfully owed).

The challenge for MrBeast when it comes to concerns about gratitude is that he is again constrained by the medium, which makes his particular brand of philanthropy possible. Gratitude on the part of those receiving his surprise gifts is an essential part of his videos, as it helps to ensure that those *watching* the videos have the desired emotional reaction: that is, one that will lead them to like, subscribe and view other MrBeast content, thus generating further resources for future Beast Philanthropy videos. This becomes even more problematic in the case of videos where MrBeast focuses his philanthropic efforts on countries in the Global South. Here, concerns about how recipients' needs are presented and the fact that gratitude is demanded of them combine with racialized power dynamics to create a mix that is potentially deeply uncomfortable. At a time when many traditional NGOs and philanthropic funders are grappling with the challenge of how to avoid succumbing to "white saviourism" in how they understand and present their work (Bhati, 2021; Bhati & Eikenberry, 2016), MrBeast's willingness to make videos that unapologetically cast him as a white saviour handing out his largesse to groups of smiling African children may seem jarringly retrograde. This may not just be a matter of distaste either: some argue that white saviourism and the propagation of "poverty porn" by international development organisations in their fundraising constitute human rights infringements, and need to be taken more seriously (Illingworth, 2022).

In addition to these ethical issues, there is also a question of individual morality: is MrBeast a good person? In order to answer this it is useful to identify four associated questions we can ask to assess a donor's moral worth in light of their philanthropy. First, does their giving produce demonstrable social or environmental good (i.e., are the causes laudable ones, and is the funding effective)? If the answer is no, then we might argue that this person's philanthropy is irrelevant to any assessment of whether they are a good person (or, in some cases, may even count against them if we believe that their philanthropy is actively causing harm). Second, what motivates this person's acts of giving? It is not clear that philanthropy necessarily has to be motivated entirely by altruism – indeed, many scholars have noted that there is a wide range of motivating factors for philanthropic giving, including cultural, psychological and social ones (Bekkers & Wiepking, 2011; Ostrower, 1997) – but the further away the motivations for a particular act of philanthropy seem to be from altruism, the more likely we are to devalue it as a measure of moral worth. Thirdly, how was the donor's wealth accumulated and does this raise ethical questions that undermine the moral legitimacy of their philanthropy? The idea that some wealth is "tainted" has a long history, and many have grappled with the question of whether such "bad money" can be "put to good uses" through charity, or whether it is to be avoided because the moral taint can corrupt others through the acceptance of gifts (Illingworth, 2022; Saunders-Hastings, 2021; Soskis, 2022). Finally, what is the wider context of the donor's life? Are there factors that may not pertain directly to their philanthropy but which we want to balance against it when making an overall assessment of their moral worth? For example, are they known to be an unpleasant person in their personal dealings, have they engaged in criminal activity, or do they have abhorrent views?

This makes it clear that there are multiple ways in which we can assess whether a philanthropic donor is in fact a "good person," and that these assessments are complex. We can imagine someone, for instance, who is known to be generally decent, has made money in a way that is not problematic, and is engaging in philanthropy for reasons of genuine altruism, but whose giving is entirely ineffective. In this case we may admit that they are a good person, but still argue that their philanthropy plays no part in making that the case. This is in fact fairly close to one of the prevalent criticisms of "do-gooders" and "indiscriminate givers" in the 19th and early 20th centuries (Humphreys, 1995; Jones, 2014). Equally, we can imagine someone whose philanthropy is having an impact, but they are doing it for the wrong reasons, or are engaging in other activities, which may cause greater harm than any good they do through giving. An extreme case of this, as detailed by Jon Dean (2023), is the former UK TV personality Jimmy Savile – who was renowned as a charity donor and fundraiser during his lifetime, but is now known to have been a horrific and prolific sexual predator who deliberately used the "good glow" of charity to mask his activities.

How does this analysis apply to MrBeast? Most people would probably accept that his giving is doing at least some good, even if it is not as strategic as they might like, so on that count we can presumably rate him broadly positively. When it comes to whether his

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motivations are good, however, we will almost certainly find more dissent. It is not possible for any of us to look into someone else's heart and determine objectively what is driving their philanthropy, so we have to go on evidence of how they go about their giving and what they say about it. On that basis some may allow that MrBeast is genuinely driven by altruism and a desire to do good; but others will accuse him of "stunt philanthropy," and of being driven only by a desire to get more likes and clicks for his content.

What about the source of MrBeast's wealth? It would not, on the face of it, seem to be "tainted" in the way that money from the Sackler family or from sanctioned Russian oligarchs is widely agreed to be. However, some might still argue that he is a significant and willing participant in an online attention economy that is increasingly understood to be detrimental to our mental health and wellbeing, and which provides perverse incentives for polarisation, division, and extreme content. Given that, perhaps in the future we will come to look on YouTube creators in the same way that we look on the Sackler family now? There is certainly no consensus of that sort at present, however, which highlights one of the key challenges of determining the tainted nature of wealth: that societal views about what is acceptable when it comes to making money are in constant flux.

Finally, what do we know about the wider context of MrBeast's life beyond his philanthropy that might inform our judgement? There don't appear to be any known factors that would provide a knockdown refutation of his character, but there are some suggestions that his affable persona might hide a darker side. Allegations, for instance, that he has treated his employees badly and created a "hostile" and "toxic" work environment (Asarch, 2021), as well as a history of making homophobic comments online (Lorenz, 2018). Whether this is enough to outweigh the positive value of MrBeast's philanthropy is a matter for debate, but it is certainly something we should take into account as we assess his moral standing.

5 | THE ECONOMICS OF BEAST PHILANTHROPY

There is a long tradition of using entertainment to raise money for charitable causes. George Friedrich Handel gave a performance of *Messiah* in 1749 to raise money for the Foundling Hospital which proved so popular that he repeated it 2 weeks later, and then every year for the rest of his life (raising around £500,000 in today's money in the process) (Classic, 2017). This set a precedent for musicians performing fundraising concerts that has continued ever since; reaching its apogee in the late 20th century with huge one-off events such as The Concert for Bangladesh (1971) and Live Aid (1985) (Lee, 2010).

There is also a well-documented wider history of celebrities using their fame to promote charitable causes and raise money – both individually and through collective efforts – such as the telethons that became commonplace in the US during the second half of the 20th century, or the annual televised fundraising events such as BBC Children in Need and Red Nose Day (in aid of Comic Relief) in the UK. An important element of these is the idea of fundraising "stunts," that is, eye-catching challenges undertaken by members of the public or by celebrities that are designed to entertain whilst also raising money through donations and sponsorship. More recently, the internet has enabled stunt fundraising to break out of the confines of organised events: in 2014 the Ice Bucket Challenge became a viral phenomenon which saw more than 17 million people worldwide post videos of themselves having buckets of ice emptied over their heads (and countless variations thereof) and raised over $115 million for the ALS Association (despite not having been initiated by the organisation). There have subsequently been many other online fundraising challenges, though none have yet replicated the viral success of the Ice Bucket Challenge.

Some have argued that MrBeast merely represents a continuation of this tradition of stunt philanthropy (Lea, 2023), and in an aesthetic and ethical sense perhaps this is true. However, there are fundamental differences between the economic model employed by MrBeast and those used in previous versions of stunt philanthropy; and in this sense MrBeast's approach to giving may be genuinely unprecedented.

One key feature of Beast Philanthropy that differentiates it from traditional models of showbiz charity is that *the philanthropy is the entertainment*. In the past celebrities may have been called upon to sing, dance, and perform comedy sketches as part of a TV fundraising event, in order to provide entertainment and give viewers a reason to watch. They may also have been called upon to present awareness-raising or fundraising videos highlighting the needs being addressed or giving people information on how money raised in previous years has been used. Traditionally there would be a dividing line between these different elements; with the shift from the "entertainment" sections to the "serious charity bits" marked by clear changes of tone on the part of the presenters; to the point where these have become a well-established trope in satirical takes on celebrity fundraising ("and now let's be serious for a moment and remember why we're all here…"). There are some cases in which the lines between the "charity" and "entertainment" elements have previously been blurred, such as when celebrities take part in fundraising challenges that are then used as the basis for documentary pieces (the BBC's Sport Relief, which ran between 2002 and 2022 as an annual televised event, was heavily based on this kind of content). However, even these do not go as far as Beast Philanthropy in making the main subject matter of the video the act of distributing philanthropic resources, so that now the charity *is* the entertainment.

The other distinctive and novel feature of MrBeast's approach to philanthropy is what he asks of viewers; or more importantly what he *doesn't* ask. In previous examples of showbiz philanthropy, we are asked at some point to put our hands in our pockets and donate, since the economic model relies on using our engagement as viewers to turn us into donors for the cause in question. This is not the case with Beast Philanthropy, however. Now, thanks to the way that YouTube's content algorithms and monetisation systems work (Alexander, 2019), instead of a dual relationship between performer and viewer/donor there is a tripartite relationship between performer, viewer and advertiser; in which we are told that *we* don't necessarily need to give because as long as we watch, *they will pay*. MrBeast himself often

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makes this point explicitly: In one video from 2021 he tells viewers "By literally hitting that subscribe button, you are taking 10 cents out of my pocket and giving it to people like we had in the video" (MrBeast, 2021a, 2021b) and in another he has one of his co-presenters ask in a mock-confused tone "so if they hate charity they won't watch the videos?" (MrBeast, 2022a). Miller and Hogg (2023), who have given the first detailed analysis of the economics of Beast Philanthropy, put it thus:

> "*Unlike previous media-based fundraising, which would ask audience members to contribute money or time to a cause, MrBeast positions his audiences as a knowing audience commodity whose viewership funds direct contributions of other people's money to good causes, merely by watching and being entertained*."

The tripartite relationship between content creator, viewer, and advertiser/sponsor forms the core of the Beast Philanthropy model. We, as viewers and "prosumers" (Miller & Hogg, 2023), are willing to donate our attention, data and engagement, and this is of longer-term value to advertisers/sponsors, who are consequently willing to pay lots of money to MrBeast (which he can then use to make more philanthropic stunt videos for us to watch) (Wade, 2023). Is this, as we are encouraged to believe, a genuine win-win-win? Has MrBeast created a philanthropic perpetual motion machine, in which everyone knows the bargain they have struck, and value is created through some kind of attention economy alchemy? Or is it in reality a battle, in which we as viewers believe we are duping companies into subsidising acts of philanthropy; those companies believe they are taking advantage of our natural attraction to altruism in order to manipulate our future spending behaviour; and meanwhile content creators like MrBeast get us to perform free "labour" in the guise of watching videos? In which case is the whole system in danger of devouring itself, like some sort of gigantic philanthrocapitalist ouroboros? Or, as the *New York Times* put it an "*unstoppable flywheel of charity, spectacle and growth – a combination lottery, raffle, game show and telethon, administered by the Willy Wonka of Greenville, N.C.*" (Read, 2023).

One obvious problem is that the economic model relies on people watching the videos, and since the philanthropy itself is the spectacle, the requirement to make that philanthropy compelling to the viewer is absolute and comes before anything else. Thus, even where ethical concerns of the sort outlined in this article (e.g., around the portrayal of recipients as "victims," or around the promotion of individualistic solutions to complex social problems) are recognised, it may be impossible to respond to them if doing so would run counter to the dictates of producing viral content. This challenge may be exacerbated in the future, if MrBeast is driven to ever more outrageous/outlandish acts of "philanthropy" to keep people watching and clicking. As he himself has noted (Fridman, 2023), in the attention economy you don't necessarily need people to *like* what you do, you just need them to engage with it [and often negative content can be easier and more effective than positive content in this regard (Bellovary et al., 2021; Robertson et al., 2023)].

A wider concern might be that in promoting the idea that giving can be entirely 'cost free', MrBeast is undermining the element of sacrifice that some would argue is a necessary part of all true philanthropy. As an old Yiddish saying puts it, "if charity cost no money, and benevolence cost no heartache, the world would be full of philanthropists." Of course, in one sense MrBeast himself is making a sacrifice, since he is foregoing some of the advertising revenue that he could have been making on his videos in order to reinvest that in future acts of philanthropy. However, for the viewer, engaging in this model of philanthropy requires no commitment of resources (apart from, arguably, their own attention and behaviour data understood as valuable commodities). What impact will this have on their willingness to engage in other forms of giving? If, in their mental accounting, they feel as though they have "done their bit" for charity (at least in part) by watching MrBeast's videos, then it may lead them to give less than they otherwise would have in other situations. This is similar to concerns about the impact that other forms of "low friction" engagement such as "slacktivism" or cause-related marketing might have on people's propensity for social action, although the evidence is not yet clear on what this impact actually may be (Kassirer et al., 2023; Kristofferson et al., 2014; Lee & Hsieh, 2013).

The other important thing to note about MrBeast's economic model is that the relationship between engagement and revenue generation for future philanthropy has now been formalised to some extent with the creation of a dedicated "Beast Philanthropy" channel, where 100% of profits from videos are directed towards an affiliated nonprofit (created in 2020). This enables MrBeast to be even more explicit about the way in which our viewing behaviour funds the philanthropic works we are seeing, although it is interesting to note that not all the videos in which MrBeast performs acts of philanthropy are published on the Beast Philanthropy channel. In fact, a number of the videos that have been most watched (particularly those that have proven controversial, such as "1000 Blind People See For The First Time" and "1000 Deaf People Hear For The First Time") were published on the main MrBeast YouTube channel. It is possible that it is just coincidental, but it may also reflect a conscious decision to get these videos, which may be felt to have a particularly high chance of going viral, out to the widest possible audience by using the main channel (which, at the time of writing, has over 240 million subscribers) rather than the Beast Philanthropy channel (which has 23 million subscribers). However, this does raise the question of whether all the revenues from these videos (which are hugely successful) are directed back towards philanthropy in the same way that they would be if they had been published on the Beast Philanthropy channel, or whether there is some extraction of value. If it is the latter that is clearly MrBeast's prerogative, but it does suggest that greater transparency about where profits are directed might be required in some cases.

6 | THE POLITICS OF BEAST PHILANTHROPY

Philanthropy is, in a sense, inherently political, since we all make choices about where and how to give which reflect our personal views about what is of public value and about how we want society to be. In the case of elite philanthropy, the political dimension is even

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more apparent, since big money donors have resources at their disposal, which are of sufficient scale to raise concerns about whether their distribution in the form of donations could have a distorting effect on the direction of public debate and public policy. (Hall, 2013; Reich et al., 2016; Saunders-Hastings, 2018). Philanthropy is also criticised on the grounds that by addressing issues in society which should be dealt with by the state, big donors position their giving (either intentionally or unintentionally) as an alternative to state provision. The problem is that philanthropy is *not*, it is argued, a feasible or suitable alternative to state provision. For one thing there is a mismatch of scale: even in its most expansive guises "philanthropy is a rounding error" when set against governmental spending, as Bill Gates has pointed out. But even if, in individual instances, philanthropy could feasibly take the place of government, it is still seen as problematic for it to do so because in replacing taxation and public spending with philanthropy, we are not trading like for like: instead we replace something based on notions of duty, justice and equitable distribution of resources with something based on notions of individual choice and preferential distribution. Furthermore, by implying that philanthropy can take the place of the state, we may undermine the consensus, which democratically elected governments rely on for maintaining their legitimacy.

MrBeast's philanthropy has certainly come in for criticism along these lines. An article in the *New Republic*, for instance, acknowledged that "*it's really great when people's lives are made better*," but cautioned that, "*mass uplift should not be subject to the goodwill or charity of a few*" (Thakker, 2023). Twitch streamer Hasan Piker, meanwhile, offered a much more visceral reaction:

> "*You watch this video and go, 'Aww, how cute and how nice.' I watch this video and I'm filled with rage that we shut off access to a ten-minute procedure because we paywalled it and decided that like some people just simply can't get it. It is so insanely frustrating that it's up to like one YouTube guy to decide to make content out of it, that people who are too poor can't just fucking see.*"

(Robinson, 2023).

Part of the anger here is not really directed at MrBeast but rather at governments which have made philanthropic interventions like his possible (or perhaps even necessary), through their own failures to meet the welfare needs of citizens (Di Placido, 2023). Given that, is it fair to blame philanthropists for taking actions to address needs which clearly do exist, simply because we would rather that those needs didn't exist or were met by government? From the philanthropists' point of view they may feel as though they are damned if they do and damned if they don't: accused of failing to meet their charitable duties if they don't give, but then accused of positioning themselves as an alternative to government if they do. In reality, many donors are all too aware of this tension and try to balance their efforts between meeting the immediate needs that are often the symptoms of society's problems, and supporting more fundamental reform that can address their underlying causes. Some of the frustration with MrBeast seems to stem from the perception that he is naïve on this front, and seems blithely unaware of these sorts of challenges. As one critical assessment put it: "*He is totally apolitical, interested in helping people without understanding (or caring about) what causes them to need help in the first place.*" The same article argues that "*MrBeast could actually have done a video on blindness that would have avoided controversy if he had demonstrated some of the anger that Hasan Piker had about how it's absurd that MrBeast even has to do this. He could have not just advocated that people in the audience give money, but encouraged them to think seriously about the fact that this problem could easily cease to exist with a few tweaks to the healthcare financing system.*" (Robinson, 2023). In fairness to MrBeast, however, he is still only 25, and although he is yet to have the Damascene conversion that would see him become a vocal campaigner for healthcare reform, he does appear to be aware of at least some of these issues. Following the release of the video in which he "cures" 1000 blind people, for instance, he tweeted:

> "*I don't understand why curable blindness is a thing. Why don't governments step in and help? Even if you're thinking purely from a financial standpoint it's hard to see how they don't ROI on taxes from people being able to work again.*"

(MrBeast, 2023).

The other problem people have with philanthropy from a political standpoint is not so much with *what* is being done but with *how* it is being done. In contrast with public spending, where decisions are filtered through the mechanisms of electoral democracy, decisions about where to deploy philanthropic resources are often entirely in the hands of the donor – so we as citizens get no say in them, and there is little or no accountability. MrBeast's philanthropy tends to evoke particularly strong reactions on this front, because the nature of the choices he makes and the factors driving them seem to many so problematic. As one Twitter user put it:

> "*It's the never-ending cycle of content creation that makes MrBeast feel insidious. The underlying notion that if the camera wasn't on to feed the machine nothing would happen. The dystopian thought we're reliant on YouTube views instead of competent government for assistance.*"

(Quoted in Weekman, 2023).

Some of it is also linked to the aesthetic concerns we have explored, since the focus on individual recipients in MrBeast's videos and the game show/prank video stylings he employs often make his decisions about where to deploy resources seem wantonly capricious. In the video where he purports to cure 1000 blind people, for example, it is not just that we might have questions about how the people in question were selected, but that as we watch, MrBeast decides to reward some of them further (with an extra $100,000 in one case and a new Tesla car in another), and this is done seemingly at random. The

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image of a "*24-year-old YouTube bro who just enjoys playing Willy Wonka, showering golden tickets (blindness cures, bricks of cash, Teslas) on random people*" (Robinson, 2023) offers such an exaggerated version of concerns about donors having too much power that it almost acts as a *reductio ad absurdum* of the whole idea that of society ever relying on philanthropy. As a result, MrBeast may inadvertently have a powerful influence on future debates about the legitimacy and appropriate role of philanthropy within a democracy.

7 | THE INFLUENCE OF BEAST PHILANTHROPY

The last thing to consider in assessing MrBeast's philanthropy is the wider influence he might have on how others engage with giving. We can think of this in relation to three distinct groups: his audience; other content creators and social media celebrities; and mainstream philanthropists and philanthropic organisations.

In terms of his own audience, which consists primarily of children and teenagers, MrBeast clearly has a huge opportunity to exert influence. We have already noted that this might be taken as a cause for concern, if we are worried about how it might shape young people's understanding of the nature of poverty and the role of charity; but equally that we might be grateful that MrBeast has chosen to use his vast platform to talk about philanthropy and generosity, when there are many far less positive messages that young people could be getting through their engagement with the internet and social media.

MrBeast's also has a great deal of power when it comes to influencing other content creators. Anyone who is keen to emulate his enormous success on YouTube (and now TikTok) may want to identify the factors that make MrBeast so good at creating viral content (which he undoubtedly is), and then look for a way of replicating them. MrBeast himself is very open in interviews and discussion about what he believes these factors are: from the amount of money spent on each video (which is huge), to the number of script iterations he goes through (which is many), right down to the highly specific format of the thumbnail image used for each video (which has been fine-tuned to maximise clicks). But the subject matter of the videos is clearly relevant too, so the fact that MrBeast has gained such huge success from videos in which he gives donations of various kinds is likely to influence others to follow suit. Indeed, this is already happening: a YouTuber named Harsha Sai, for instance, has taken the stunt philanthropy model and successfully transplanted it to the context of India – as a result he has amassed an online following of over 22 million people and been dubbed "India's MrBeast." Sai's videos have also raised ethical concerns and attracted criticism of the same kind that has faced MrBeast (Christopher, 2023). On TikTok, meanwhile, there is a whole subgenre of "acts of kindness" videos in which content creators like Harrison Pawluk surprise strangers with gifts (some of which are monetary, but in other cases the gifts are things like flowers or hugs). These have also proven controversial, as concerns have been raised about the lack of consent on the part of the recipients in the videos, as well as the potentially exploitative nature of the filmed interactions (Hunt, 2023; Kumamoto, 2022).

MrBeast may have a more direct influence on other content creators too, through his active efforts to engage them in philanthropy. In 2019, to celebrate his 20 millionth subscriber, MrBeast joined forces with the Arbor Day Foundation to establish the "#TeamTrees" project, with the aim of raising $20 million to plant 20 million trees. He did this in partnership with the popular science YouTuber Mark Rober, and through getting many other creators, famous figures and viewers to donate, they were able to raise over $24 million and garner more than a billion views (Alexander, 2019; BBC News, 2019; Purcell, 2022; Williams, 2019). The success of this initiative led MrBeast to set up "Team Seas" in 2021, this time with the aim of raising $30 million to remove 30 million pounds of plastic from oceans and waterways.

The influence of MrBeast on mainstream philanthropy has to date been less noticeable. Despite his obvious success and the scale of his giving, there is little evidence that donors outside the world of content creation are seeking to emulate him, or that traditional philanthropic organisations are giving any thought to what his approach might tell us about potential future trends. This might be because philanthropy is often slow to adapt in the face of new societal or technological developments. Or, it might be because the model that MrBeast has developed is unique to his own skill set and mode of wealth creation, so cannot be replicated more widely. But, it might also be a reflection of underlying concerns about his approach, and perhaps a sense that we should not seek to replicate what he is doing even if we could, because of the many challenges and questions it raises. If that is the case, then it is important that we are clear about the precise nature of any concerns and what it is about his approach to giving that we find problematic. This article has attempted to outlined some of the questions we need to be asking, in the hope of sparking further thinking and debate on this issue.

ACKNOWLEDGEMENTS

The author would like to thank the other contributors to this Dialogues edition for their thoughtful and generous engagement with the original pillar article. The author would also like to thank the editorial team at the Journal of Philanthropy and Marketing for their valuable support throughout the production of this edition.

CONFLICT OF INTEREST STATEMENT

The authors declare no conflicts of interest.

DATA AVAILABILITY STATEMENT

Data sharing not applicable to this article as no datasets were generated or analysed during the current study.

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How to cite this article: Davies, R. (2024). Good intent, or just good content? Assessing MrBeast's philanthropy. *Journal of Philanthropy and Marketing*, *29*(2), e1858. https://doi.org/10.1002/nvsm.1858

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WORK 5:

Davies, R. (2024e) “Guided Choices: The ethics of using algorithmic systems to shape philanthropic decision-making”, Chapter 27 in Ugazio, G. & Maricic, M. (eds.) *The Routledge Handbook of Artificial Intelligence and Philanthropy*. Routledge, pp 451-470. Available at: https://www.taylorfrancis.com/chapters/oa-edit/10.4324/9781003468615-32/guided-choices-rhodri-davies. (Accessed 5 December 2025). Kent Academic Repository ID: **https://kar.kent.ac.uk/112272/**

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GUIDED CHOICES

The ethics of using algorithmic systems to shape philanthropic decision-making

Rhodri Davies

1 Introduction

Discussion of the potential impact of artificial intelligence (AI) in the field of philanthropy has, to date, largely focused on three areas:

- The potential for harnessing machine learning (ML) and other tools to deliver new social and environmental interventions and how civil society organizations (CSOs) and philanthropic funders could play a role in realizing this potential;
- How AI might affect CSOs and philanthropic funders themselves through new opportunities to transform internal processes or through altering the nature of the broader financial and regulatory systems within which they operate;
- The impact that AI may have on individuals and communities and what this might mean in terms of the need for new approaches or increased advocacy from funders and CSOs.

What has received far less attention is the question of how AI may affect the philanthropic choices made by individuals, about when, where, and how to give. This may reflect a broader lacuna in our knowledge since, as Susser notes, "for several years, scholars have (for good reason) been largely preoccupied with worries about the use of artificial intelligence and machine learning (AI/ML) tools to make decisions *about us*," but that "only recently has significant attention turned to a potentially more alarming problem: the use of AI/ML to influence our *decision making*" (Susser, 2019). However, even if this is true across a broader set of domains, it is a particular problem for philanthropy, as individual choice plays a fundamental role in this context. Philanthropy's inherently dual nature (Reich et al., 2016) means that we have to understand it at both a macro level – as a systemic mechanism for allocating and redistributing resources within society at a scale that positions it alongside both the state and the market – and a micro level, where it reflects the myriad choices of individuals to use their "voluntary action for the public good" (Payton & Moody 2008). Hence, the capacity of AI to affect how we make individual choices has profound implications for the future of philanthropy.

This chapter will look at these implications and how we might respond to them. It will consider the nature and role of choice in philanthropy, what we know about the capacity of AI to influence

DOI: 10.4324/9781003468615-32
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and shape our individual choices, and what this suggests about the potential impact of AI on philanthropic choice and decision-making. The implications will be considered across three key groups of actors that have the potential to employ AI to shape the decisions of potential donors, namely:

- General-purpose search and recommendation services (i.e., search engines, conversational interfaces, text-based generative AI tools);
- Giving platforms (i.e., dedicated donation/lending or crowdfunding platforms and commercial platforms that facilitate giving, such as payment providers or social media platforms);
- Individual cause-based organizations (both formal and informal).

The chapter will highlight key ethical questions that emerge from considering the use of AI by each of these different actors and suggest changes in policy or practice that could help to address them.

2 Choice and philanthropy

Choice plays a fundamental role in philanthropy since our ability as individuals to decide whether and how to give away private assets for public benefit is one of the defining characteristics of philanthropy when set against other redistribution methods. However, there may be a danger that in making this assumption, we beg an important question about the nature of philanthropy since one of the fundamental philosophical questions about philanthropy throughout the ages has been whether it should be understood as a choice of duty. Is giving something you are entirely free to choose whether to do or not to do or are there moral or societal obligations of some kind that compel you to give (Martin, 1994; Schneewind, 1996)? To take one example of how this debate has evolved and the influence it has exerted, the predominant view among medieval Catholic scholars was that God determined the unequal distribution of wealth and resources within society and that part of his plan was for redistribution to take place through charity and almsgiving; so the "haves" had a duty to give to support the "have-nots" (Roberts, 1996). The Enlightenment then saw a shift in thinking about the nature of property that caused views to diverge. For some, like Locke or Grotius, people had a "natural right" to ownership of property that they had amassed through their efforts, and it was up to them whether to choose to share it (Winfrey, 1981). For others, like Wollstonecraft and Kant, the unequal distribution of resources reflected the fact that society was unjust, and addressing this injustice demanded that those with wealth give back as a matter of duty rather than of choice. To the extent that this duty was a "perfect" one (i.e., a duty where it is clearly defined who the recipients are and what they are due), it was usually thought best discharged through taxation. However, many argued that philanthropy represents an additional "imperfect" duty, where the requirement to give is clear, but the exact nature of how the money must be given or to whom is not specified (Schneewind, 1996).

The extent to which philanthropic giving represents a choice or a duty remains a matter of debate even today. Those who prioritize individual liberty may feel that philanthropy must be seen entirely as a matter of choice (Nozick, 1974; Salmon, 2023). Others who place more emphasis on justice and the equitable distribution of resources will argue that we must acknowledge an element of duty when it comes to philanthropy, even if this impinges upon our individual freedom. For instance, the moral philosopher Peter Singer has argued that there is a moral duty on those with sufficient wealth to give some of it out to help people in extreme poverty (Singer, 1972, 2006). Cordelli (2016) goes further, arguing that "philanthropy should be understood foremost as a duty

of reparative justice" and that "affluent donors should, as a matter of moral duty, exercise no personal discretion when deciding how to give and to whom. Indeed, they should regard their donations as a way of returning to others what is rightfully theirs." In this view, philanthropy becomes solely a matter of duty, and there is no room for choice.

A reasonable position between these two extremes is to allow that both duties and choices guide philanthropic giving. We pay taxes as part of an agreed social contract, but this does not necessarily fully discharge the duty we owe to others, so an element of duty may also apply to our giving. In part, this may be simply an imperfect *duty to give* in an unspecified way, but it may also be a more specific duty to give *in a particular way* or *to particular causes* (MacAskill, 2015; Singer, 2015). (A duty that would obviously only have moral rather than legal force, of course.) Most people would stop short of claiming that *all* our philanthropy is driven by duty, however. They would allow the possibility of some giving that is *supererogatory* (i.e., above and beyond that which is demanded by duty). This portion of giving, at least, would be governed solely by choice in terms of our decision to give in the first place and in terms of what we choose to give to (Gewirth, 1987).

According to most current views, choice remains a vital ingredient of philanthropy. For this reason, it is unsurprising that a substantial body of research aims to shed light on the key factors affecting the choices we make when giving. Several literature reviews have attempted to survey this body of research and synthesize findings across it (Bekkers & Wiepking, 2011; Allen, 2018; Saeri et al., 2023), although they note that this presents challenges because the research is found across a wide range of disparate disciplines – including economics, political science, anthropology, neurology, psychology, and marketing – reflecting the inherently cross-disciplinary nature of philanthropy as a field of study. Despite this variety, however, it is possible to identify common themes across research from different fields. Bekkers and Wiepking (2011), for instance, postulate eight mechanisms that drive giving based on their analysis of the available literature: (1) awareness of need; (2) solicitation; (3) costs and benefits; (4) altruism; (5) reputation; (6) psychological benefits; (7) values; (8) efficacy.

Within these broad categories, it is possible to identify a wide range of specific factors that may affect philanthropic decision-making. Some relate to macro-level considerations, such as religious and ethnic diversity among donors (Andreoni et al., 2016), social class and socioeconomic status (Piff et al., 2010), the impact of government funding (Andreoni & Payne, 2011), the presence of match funding (Karlan & List, 2007), the availability of "social information" on what other donors have given (Alpizar et al., 2008; Croson & Shang, 2008; Shang & Croson, 2009), or the effect of media coverage of disasters (Brown & Minty, 2008). Various studies have also attempted to identify relevant cultural factors by exploring children's attitudes to giving and prosocial behavior, finding that children appear to have a natural inclination to act pro-socially even from a very young age (Zahn-Waxler et al., 1992; Warneken & Tomasello, 2006), that younger children are less prone to "free-riding" behavior than adults (Harbaugh & Krause, 2000), and that as children get older, they are more likely to give to someone when they believe that the other person might reciprocate their generosity (Sebastián-Enesco & Warneken, 2015).

Many micro-level factors affect decisions made about giving at an individual level. Some of these are relatively unsurprising, such as whether the person soliciting donations is a member of their peer group (Meer, 2011), whether the person soliciting makes an audible request or not (Andreoni et al., 2017), the level of information the donor has about the cause being fundraised for (Eckel et al., 2007), whether that information concerns an identifiable individual or is in the form of statistical evidence (Jenni & Loewenstein, 1997; Slovic, 2007), and what kind of information the donor is given about the performance of the organization asking for funds (Butera & Horn, 2020). Other factors are perhaps less obvious, such as the influence of our body chemistry:

a number of studies have found, for instance, that the release of oxytocin results in a greater willingness to give (Zak et al., 2007; Barraza et al., 2011), while others have found that the brain's dopamine reward center may respond similarly when we give to how it does when we receive other kinds of rewards (Moll et al., 2006). There are also more esoteric factors that studies have found may have a bearing on our willingness to give and the choices we make: for instance, being exposed to "awe-inspiring" content (Rudd et al., 2012), having a prior conversation that primes you with the notion of a God or Supreme Being (Shariff & Norenzayan, 2007), thinking about death (Jonas et al., 2002), listening to "chill-inducing music" (Fukui & Toyoshima, 2014), listening to music with "prosocial lyrics" (Greitemeyer, 2009), or being in the presence of images of eyes (Ekström, 2012; Sparks & Barclay, 2013; Fathi et al., 2014).

As more and more of us give online − either through dedicated nonprofit platforms or, increasingly, through commercial social media or payment platforms that have added giving functionality to their offering – the nature of philanthropic choice and decision-making is changing rapidly. For one thing, the range of options available to us is far more significant because we are no longer constrained by physical proximity: many platforms enable individuals to give to groups and causes worldwide without ever needing to contact potential recipients or fundraisers. We are also less constrained by a reliance on formal organizations, as a large volume of online giving goes to informal groups, grassroots social movements, or individuals (Bernholz, 2021). But perhaps the most profound impact of the shift toward giving online is that the digital environment offers new opportunities to design "choice architectures," that is, how choices are presented to us so they are tailored and responsive to our personal preferences and can be highly targeted to produce desired outcomes. Knowledge of the individual − and often unconscious − factors that shape our giving decisions will be an important competitive advantage when harnessing such approaches' potential. Some have already questioned whether this raises ethical concerns and whether it is appropriate to exploit insights about our subconscious behavioral drives to "nudge" us toward specific actions in this way when it comes to philanthropy and other prosocial behavior (Schulz et al., 2017; Ruehle et al., 2021). Such concerns are only likely to become more acute as the impact of AI is felt more widely, as we shall see.

3 Choice and AI

AI already significantly impacts how choices and decisions are made in a wide range of fields. As noted at the start of this chapter, there has been a particular emphasis on how algorithmic systems are used to make decisions *about* us, with a growing body of literature examining the opportunities this presents – in terms of bringing new capabilities and efficiencies across the public, private, and nonprofit sectors (Wirtz et al., 2019; Kanter & Fine, 2022) – as well as the challenges it brings, such as new risks of "machine bias" against marginalized groups (Wachter-Boettcher, 2017; Eubanks, 2018; Noble, 2018) and concerns about insufficient transparency and accountability (de Fine Licht & de Fine Licht, 2020; Loi & Spielkamp, 2021). In this chapter, however, our primary focus is not on how AI may be used to make decisions about us but how it might affect our decisions as individuals when it comes to philanthropic giving. To that end, we will consider three key areas:

- The use of algorithms to determine responses to requests for information and how this shapes our choices and decision-making;
- The capacity of AI to enable personalization and "hyper-nudging," to drive particular actions and outcomes;
- The use of AI-generated content to prompt emotional responses and thus drive behavior.

3.1 AI and information provision

Our online world experience is heavily shaped by algorithms (Schmidt, 2021). While it is theoretically possible to navigate the internet without using intermediaries, in reality, the vast majority of web traffic comes via search engines (BrightEdge, 2019). More recently, social media platforms and conversational interfaces (either text-based, such as OpenAI's ChatGPT, or voice-based, such as Apple's Siri or Amazon's Alexa) have also evolved to fill a similar role in many users' online experiences (Huang, 2022; Perez, 2022). In both cases, the information we are provided is determined algorithmically in one of two main ways. The first is the *reactive* provision of information in response to a request, where a range of suitable answers may be algorithmically determined and then presented to the user either in the form of a ranked list (as in the case of a traditional search algorithm, such as that used by Google) or in the form of a single answer or small handful of answers (as tends to be the case with conversational interfaces). The second way algorithms may be used is for the *proactive* provision of information, where the user has not made an explicit request, but instead, suggestions or recommendations for content they may be interested in are provided to them based on data about their known interests, preferences, or online behavior. Recommender algorithms, which typify this latter approach, are at the heart of social media platforms such as TikTok, X, and Facebook, as well as content platforms like Spotify, Netflix, and YouTube, all of which seek to provide a steady stream of enticing content for us to click through to next to keep us on the platform for as long as possible (Schrage, 2020; Roy & Dutta, 2022).

When trying to understand how algorithms can shape our choices across both of these contexts, there are at least three things we need to consider: *what* information is provided (i.e., what the algorithm determines as the "correct" or "best" answer to a query, or how it decides what to recommend to us); *how* the information is provided (i.e., whether it comes in the form of a single answer or a list, and whether we can refine the information presented to us); and finally *our perception* of the information (i.e., whether we are aware that it represents the result of an algorithmic process).

The most basic question we must ask is: what is the nature of the algorithm that has produced the information we are presented with (with the immediate corollary questions: "Who designed it?" and "What are their motivations?")? Unfortunately, here we encounter an issue that will prove to cut across almost all our considerations, namely lack of transparency. In the case of many of the algorithms that shape our online experience – such as Google's ranking algorithm, TikTok's video recommender algorithm, or YouTube's content algorithm – the question of how they work largely remains a mystery. This is partly because these algorithms are closely guarded proprietary secrets. Still, it is also because many of them are by design "black boxes," whose inner workings are deliberately opaque and not always fully comprehensible even to those who created them (Pasquale, 2015; von Eschenbach, 2021). Scholars and campaigners have increasingly called for this situation to be remedied by introducing greater openness to the use of algorithms. Initially, this was focused on the idea that we need to make algorithmic systems more transparent, but more recently, the focus has shifted toward making algorithms "explainable," since transparency by itself is no longer felt by many experts to be a useful goal, as for most users being able to see the inner workings of an algorithm doesn't further their understanding of how it works (Mittelstadt et al., 2019; Rai, 2020).

How information is presented to us is also important. In particular, the emergence of conversational user interfaces (CUIs) as alternatives to traditional search engines to find information is potentially very significant (Liao et al., 2020). The design of CUIs may vary considerably, from basic chatbots that provide only limited responses through systems that can hold natural language conversations at a level that may be functionally indistinguishable from a human being; however, one feature that most of them have in common is that information is no longer presented in the

form of a complete ranked list that can be inspected visually, but in the form of an "answer" (or small set of answers) to a question we have posed (Zamani et al., 2023). In practical terms, this may make it harder to identify and compensate for any biases. There are already concerns that traditional search engines perpetuate biases of various kinds (Espín-Noboa et al., 2022; Maillé et al., 2022), but the challenge may be more significant when it comes to information delivered through CUIs; both because of how we interpret the status of the information and because it is no longer possible to compensate for bias simply by looking further down the list of pages of results, as we might do with a traditional search engine. For these reasons, among others, some have questioned whether CUIs should be considered viable alternatives to conventional search engines (Gurdeniz & Hosanagar, 2023).

There are also deeper issues here. For one thing, we tend to see language as a marker of intelligence (Mahowald et al., 2023), so the more that automated systems can respond to our requests for information in credible natural language, the more likely we are to accept what they tell us and the less likely we are to assess that information critically. Another challenge is that the conversational nature of interfaces may reduce the *visibility* of the underlying technology, that is, our awareness that a process of digital intermediation and algorithmic determination of information is taking place. As scholars have noted, the potential *invisibility* of technology is a significant factor when it comes to practical and ethical concerns about how AI may shape individual choices, both because we are rendered far more susceptible to manipulation through technology when we are not even aware that this technology is being used (Van den Eede, 2011; Susser, 2017), and because the threat to autonomy is significantly higher (André et al., 2018; Vaassen, 2022; Bartmann, 2023).

The increasing invisibility of algorithmic systems and our willingness to accept the information they present us with less critically has led some scholars to claim that the distinction highlighted earlier in this chapter – between reactive information provision and proactive recommendation – is no longer that meaningful. For instance, Zamani et al. "do not make a strong distinction between *search* and *recommendation* tasks" because they see them as "closely related tasks that are becoming more closely related as time passes" and argue that in many cases, the same task can often be characterized as either search or recommendation depending on the device or interface being used and the context in which the task is taking place (Zamani et al., 2023). This blurring of boundaries between searches for information that we undertake actively and recommendations that we receive passively clearly has implications for the degree of autonomy we retain as users (Bartmann, 2023). However, we also need to bear in mind that the increasing reliance on algorithmically determined recommendations is primarily driven by our demands as consumers for highly tailored and personalized experiences (Arora, 2021). Should we, therefore, view this less as an unprovoked assault on our autonomy and more as a Faustian pact that we have entered into, in which we sacrifice autonomy for convenience?

3.2 Personalization, choice architecture, and hyper-nudging

The information provided to us is an important determinant of our choices, but it is by no means the only one. A range of factors relating to how options are presented to us also significantly affect our decisions.

Thaler and Sunstein (2009) coined the term "choice architecture" to describe this range of factors (and "choice architect" to refer to anyone who has control over them) (2009). Advertisers and marketers have long known that our subconscious motivations and drivers can be manipulated to sell us things (Samuel, 2010). Still, since the publication of Thaler and Sunstein's work, there has

also been significant interest in how the design of choice architectures can be used in the public and nonprofit sectors to "nudge" people toward desirable prosocial actions (Behavioural Insights Team, 2013; Schulz et al., 2017; Capraro et al., 2019). (A "nudge" is defined by Thaler and Sunstein as "any aspect of choice architecture that predictably alters people's behavior without forbidding any options or significantly changing their economic incentives.")

Many early experiments with choice architecture focused on using the design of physical spaces or interactions to influence people's actions. However, it is in the digital world that choice architecture and nudging have really come into their own, as in this context, it becomes possible to tailor choice architectures to individuals in a way that is not feasible in the physical world (Thomas et al., 2013; Weinmann et al., 2016). AI has now added a significant further dimension, as the combination of big data and algorithmic processes makes it possible not only to personalize nudges but to adapt them iteratively in real time in response to user behavior. The legal scholar Karen Yeung has coined the term "hyper-nudge" for this phenomenon (Yeung, 2017) and argues that:

> unlike the static Nudges popularized by Thaler and Sunstein (2009), such as placing the salad in front of the lasagne to encourage healthy eating, Big Data analytic nudges are extremely powerful and potent due to their networked, continuously updated, dynamic and pervasive nature (hence "hypernudge").

There is an existing body of critical thought about the ethics of nudge approaches (Bovens, 2009; Hobbs, 2017; Ruehle et al., 2021), but hyper-nudges bring new challenges of their own. Allowing autonomous systems to act as choice architects may, for instance, raise significant issues regarding transparency, responsibility, and accountability (Mills & Sætra, 2022). There are also questions about whether the iterative and adaptive nature of hyper-nudges makes it harder for us to avoid them than traditional nudges, and whether they present a more significant threat to our autonomy (André et al., 2018; Mills, 2022).

3.3 Generative AI and emotive content

Generative AI is a term for a broad class of models or algorithms that produce new content – such as text, photos, illustrations, video, audio, or code – based on large sets of suitable training data. We are already seeing generative AI being used in efforts to shape our individual choices. This will likely become even more commonplace in the future since the ability to generate audio and visual content that seems genuine – while in fact, being carefully calibrated to convey specific messages or emotions – represents a hugely powerful new tool for inducing beliefs and influencing actions (Sætra, 2023). We will undoubtedly see an increase in malicious attempts to spread misinformation and disinformation to induce false beliefs; there have been widespread concerns, for instance, about the rise of "deepfakes" – synthetic media that have been digitally manipulated to replace one person's likeness convincingly with another – and their potential deployment in the context of elections and other political events (Chesney & Citron, 2018; Diakopoulos & Johnson, 2021; Pashentsev, 2023). Not all applications of generative AI will be deliberately malicious, of course, but some scholars argue that even the well-intentioned use of technology such as deepfakes is potentially harmful because it undermines our notions of authenticity in the online environment and thereby exacerbates the problematic erosion of trust (Hancock & Bailenson, 2021; de Ruiter, 2021).

4 AI and philanthropic choices

To understand how general considerations about how AI could affect individual choices apply in the specific context of philanthropy, we will consider three key actors that play a role in philanthropic choice-making in the digital environment:

- General-purpose search and recommendation services;
- Giving platforms;
- Individual cause-based organizations.

We will consider each actor's motivations for wanting to shape our philanthropic choices, what this means in terms of their likely adoption of AI tools, and the potential ethical raised.

4.1 General-purpose search and recommendation services

Many websites, platforms, and interfaces providing information to users – either in the form of reactive responses to requests or proactive recommendations – are not explicitly designed with philanthropy or the nonprofit sector in mind. The paradigm example is traditional search engines, but this category also includes any social media, content platforms, or conversational user interfaces that allow users to search for general information or to receive recommendations that could influence choices about giving. The primary motivation, in this case, is satisfying user demand for information – whether that is explicit (e.g., a search request) or implicit (e.g., a perceived openness to receiving a recommendation) – to ensure that users remain on a platform or return to a service in future. It is also possible that the company operating the search or recommendation service has its own corporate social purpose, which may be an additional factor in the motivation to provide information that can shape philanthropic choices.

In the case of providing information in response to a user request, it is unlikely the provider will exert any influence over the initial decision to give since this has most likely already been taken. However, there is substantial potential for influencing *where* and *how* the gift is made. A user may be seeking objective information – for instance, on which nonprofit organizations operate in a particular geographical location – or that user may be looking for more subjective information – for instance, on the "most pressing need" or which nonprofit organizations are "most effective." In both cases, it is important to interrogate the nature of the algorithms used to determine the information on offer and the goals and motivations of those designing and operating them. As highlighted earlier in this chapter, this is particularly important in those cases where responses to requests for information are presented in the form of a single answer or small selection of answers rather than a list, as in these cases, our ability to counteract the choice architecture imposed by the algorithm is much more limited.

In the case of proactive recommendations or unprompted information designed to act as a nudge, the user need not have taken any prior decision to make a philanthropic gift, so it would be possible to influence not only where and how they give but their choice to do so in the first place. In this situation, it would be important to examine what motivation the search provider or platform had for encouraging or nudging prosocial behavior in the form of giving. For instance, if it reflects a broader corporate social purpose, is that purpose explicit and known to the user? Is the aim merely to encourage giving in a generic sense, or is the information presented in such a way as to promote giving to specific types of causes or according to a specific philanthropic ideology?

In previous cases where generic service providers have decided to offer some form of giving functionality, such as the ability to make donations when using ATMs or paying at a checkout, concerns have been expressed about the limitations of the options available to users and the role the service provider plays in determining them (Caulfield et al., 2022). In the case of ATM giving or checkout donations, it is a relatively straightforward matter for users to bypass the nudge. In the case of nudges applied online, however, as we have already seen, the reduced visibility of the technology may lead to users being less aware that a choice architect is attempting to shape their behavior – which might make the nudge more effective but also brings a greater risk of eroding users' autonomy (Lv & Huang, 2022). In cases where hyper-nudges are implemented, the iterative and adaptive nature of the algorithms raises a further challenge in terms of an increased "burden of avoidance" (Susser, 2019), since it also becomes far more difficult for users to bypass the nudge.

4.2 Giving platforms

Many platforms are specifically dedicated to providing information and offering transactional services that encourage and facilitate giving. Some of these are themselves nonprofits or charitable organizations, while others may have for-profit organizational structures but with a stated social purpose. Some focus primarily on traditional philanthropic donations, but others offer opportunities that go beyond this, such as the ability to make loans or to contribute to crowdfunding campaigns in support of organizations or individuals (Lilly Family School of Philanthropy, 2023).

The majority of giving platforms aim (either stated or implicit) to try to increase levels of generosity by making it easier and more appealing for people to give. Some, however, may emphasize increasing the quality of giving rather than the quantity, and to that end, may focus on promoting a particular view of effectiveness or impact. Even where platforms profess to be "cause neutral" (i.e., not promoting any one cause above others), it is essential to recognize that the range of options they present to users does not represent the entire domain of potential gift recipients since all platforms have criteria that limit what users can give to. In some cases, these criteria are explicit – such as limitations on the geographic location of recipients or requirements that they must have specific legal or organizational structures – but increasingly, there are also concerns that platforms take additional decisions to remove particular organizations or cause areas that may meet legal requirements, but which have been deemed unsuitable for some reason. As more and more giving takes place online, the concern is that platforms play the *de facto* role of arbiters of the acceptable boundaries of civil society simply because of the criteria they impose about what their users can or cannot give to, but that this power comes with little in the way of transparency or accountability (Carlman, 2020; Wade, 2022).

In many cases, users will engage with a giving platform having already made the initial decision to give, so any use of AI will be more about informing and shaping their choices about which causes to give to and what methods to use. The key questions then are about how algorithms are being applied and what their purpose or goal is. One vital dimension here is visibility: are users aware that an algorithm is being used to determine the information they are presented with? In some cases, the involvement of AI may be obvious: for instance, where a chatbot is clearly and openly being used to respond to search requests or to provide advice and recommendations. In other cases, however, the algorithmic processes may be hidden within the platform's infrastructure, so users may not be aware of their existence. This will have a significant bearing on the degree to which we have concerns about whether the individual autonomy of users is being undermined. It may also have practical implications, as there is some evidence that people are less

likely to donate when they feel as though their ability to choose has been limited, even when they are presented with options that appeal to them (Lv & Huang, 2022).

The visibility of any algorithms used to determine the information provided by a philanthropic giving platform is an important consideration, but even more important is the question of *what those algorithms are designed to do*. In the case of giving platforms that position themselves as neutral intermediaries, presumably, the goal is to maximize user satisfaction − in much the same way as the general-purpose search interfaces considered above. What does it mean in practice to "maximize user satisfaction" when it comes to philanthropic giving? We might assume that it means presenting users with information on organizations and causes likely to appeal to them, thereby increasing the likelihood that they will make repeat donations to those same organizations and causes or to others in the future. However, there are reasons to be cautious about adopting this as an acceptable goal. For one thing, some would question whether maximizing donor satisfaction should be seen as the sole or primary aim of fundraising or philanthropy advice and would argue that the ability to challenge donors – by questioning their assumptions or pushing them outside of their comfort zone − is an important part of both professions (Beeston & Breeze, 2023). In recent years, there has also been growing debate in the fundraising field over whether "donor-centric" or "community-centric" models are preferable (MacQuillin, 2022). In the context of using AI to shape giving choices, the adoption of donor satisfaction as the primary objective may prove particularly problematic due to the recognized tendency of ML systems to exhibit "algorithmic bias" where algorithms trained on data sets that contain existing statistical biases come to reflect and entrench those biases over time. To design an algorithm that could provide giving choices and recommendations that were likely to satisfy donors, you would need to consider information such as individual user's past donations and the giving behavior of others who share relevant demographic features. However, that data reflects the existing limitations of the philanthropic marketplace: such as the fact that large organizations receive the lion's share of donations (National Council for Voluntary Organisations [NCVO], 2023), the fact that "unpopular" or "unfashionable" causes a struggle to raise funds (Body & Breeze, 2016), or the fact that the system as a whole demonstrates significant biases in terms of race and gender (Dorsey et al., 2020; Damm et al., 2023). The concern would be that an algorithm designed to satisfy donors and trained on this data would lead to many of these known challenges becoming exacerbated, with smaller organizations, unpopular causes, and organizations led by women or people of color becoming increasingly marginalized in favor of well-known nonprofit brands and "safe" causes.

Suppose concerns such as these lead us to conclude that donor satisfaction should not be the sole criterion when designing philanthropy algorithms. In that case the obvious question is: what other goals should we specify? We might suggest that the aim should be to maximize effectiveness, by ensuring that resources are targeted toward areas of greatest need, or ensuring they are directed toward interventions with the highest level of impact (according to some preferred measure). However, this raises both practical and theoretical challenges. In practical terms, we do not have the current data that would allow us to say where the need is most acute or where the impact is most significant, even if we wanted to. And in theoretical terms, it is not apparent that we could define either of these things meaningfully even if we did have all the required data. Identifying specific needs as "most acute" or specific interventions as having the "greatest impact" would require us to have measures of need and impact that can be applied objectively across cause areas, and many would argue that this is impractical and undesirable. Some approaches to giving, such as Effective Altruism (EA), try to address this challenge head-on by promoting the idea of a utilitarian, cause-agnostic single measure of value that can be used as a benchmark across all philanthropy (MacAskill, 2015). These are far from universally accepted, however, and EA in particular

has attracted heavy criticism from many for being unrealistically normative, for applying an overly simplistic framework to complex social problems, and for being an ideology that favors easily measurable interventions within the current status quo over harder-to-measure campaigning and advocacy that aims at fundamental reform of systems and structures that are the root cause of societal challenges (Srinivasan, 2015; Gabriel, 2017; Crary, 2023). It would certainly be possible to use the principles of EA as the basis for a cause-agnostic algorithm that could provide information and recommendations to people to maximize overall Expected Value in a utilitarian sense but to do so would reflect a clear bias toward one particular, and strongly ideological, view of philanthropy.

Since it is not possible to find a purely objective way to measure impact or need (or at least one on which there is majority consensus), any additional criteria we apply in designing the goal of a philanthropy algorithm must be subjective to some extent, so their legitimacy will derive from whatever authority we appeal to justify their adoption. In some cases, a platform may rely on its own authority if it has decided to take its own stance on what constitutes "good" giving and apply these to the designs of any algorithms it is using, but this will obviously leave it open to challenges. In other cases, a platform may choose to appeal to an external authority, such as the United Nations Sustainable Development Goals (UNSDGs). Clearly, this still does not provide a purely objective goal for giving, and the UNSDGs have their fair share of critics (Swain, 2018). Still, as a globally agreed framework for prioritizing needs and focusing actions, they also have a relatively high degree of legitimacy (and certainly more than a single giving platform would have by itself), so they may provide an appealing basis for setting the goals of a philanthropy algorithm.

Once a goal or set of criteria has been determined that can act as the basis for designing a philanthropy algorithm, there may still be a further challenge to ensure that the algorithm remains aligned with the creator's original intention. At one time, the only option available for those attempting to create AI systems would have been to map out all of the possible steps in a process and then program those directly into an algorithm (this model is sometimes colloquially known as "Good Old Fashioned AI" or GOFAI [Boden, 2014]). This presented a significant limiting factor because it requires that we understand the underlying nature of all the capabilities we are trying to emulate and capture these in symbolic form, but there are many functions, such as natural language conversation or image recognition, that are seen as important aspects of intelligence and which humans can usually perform easily, but which we are not able to explain fully. This is one of the main reasons that the emergence of machine learning approaches as an alternative to GOFAI has led to such enormous growth and evolution in AI: because designing algorithms that can "learn" by going through a process of repeated iteration and self-modification to improve performance concerning a specified measure allows us to create systems that can approximate (or even surpass) human performance in certain tasks *without us having to specify all of the steps involved in performing that task* (Smith, 2019). In cases where machine learning algorithms match or exceed human performance, one of the things that has been noted is that they often do so by solving problems in ways that never would have occurred to a human and perhaps aren't even fully understandable to us. A growing body of literature has explored this phenomenon in various contexts; for instance, algorithms that are designed to play video games, where it has been found that they often end up achieving their set goal of scoring highly or winning by engaging in "specification gaming" (i.e., looking for loopholes or weaknesses in how the task has been specified or in the video game's design) rather than by playing within the confines of the game in the way that a human would (Krakovna et al., 2020; Lehman et al., 2020). This makes it clear that our *goals* and *values* in designing ML algorithms are hugely important. If we may have little or no control over *how* algorithms evolve to achieve a particular result, it becomes absolutely vital that we can stipulate clearly what our desired goal is and what the acceptable parameters are when it comes to achieving it.

The idea of Value Alignment has come to prominence through the work of philosopher Nick Bostrom, who argues that one of the key challenges of AI development is what he has christened the Value Alignment Problem (VAP), i.e., ensuring that highly autonomous AI systems are designed to ensure that their goals and behaviors remain aligned with human value throughout their operation (Bostrom, 2014). Bostrom's work focuses on Artificial General Intelligence (AGI) and Superintelligence, i.e., AI systems that are capable of matching or surpassing human-level intelligence concerning any task, which, at this point, remains hypothetical. To demonstrate the potential risks of value misalignment, he created a thought experiment known as The Paperclip Maximizer, in which a highly intelligent AGI is given the simple task of producing as many paperclips as possible (Bostrom, 2003). The danger, Bostrom argues, is that without additional specification of constraints, the AGI may choose to maximize its performance of this task in ways that radically diverge from our original intent: perhaps it will decide, for instance, to wipe out the human race because it believes that human beings pose a threat (because they may order it to cease paperclip production at some point in the future) or simply because we represent valuable stores of raw materials that the AGI believes would be better used for making more paperclips. The Value Alignment Problem doesn't just apply to Superintelligent systems or AGI, however. It is also relevant to domain-specific AI systems of this kind we have today. And it is not limited to trivial examples of algorithms bending the rules win at computer games either: as AI systems are increasingly deployed by governments and companies in a wide range of contexts, they have the potential to affect many areas of our lives, so ensuring that they remain aligned with our values and intentions is crucial (Korinek & Balwit, 2022).

In the context of philanthropy algorithms being deployed by giving platforms, as in many other areas, the challenge will be to find ways of giving AI systems sufficient freedom and autonomy to bring benefits in the form of increased effectiveness and efficiency while minimizing the risk of negative unintended consequences. There is a growing body of literature focused on "AI safety" that proposes ways of achieving this balance by designing safeguards that enable suitable human oversight and corrective acts when the risk of unintended consequences do occur (Leslie, 2019; Houben et al., 2022), and it is important that those seeking to create philanthropy algorithms draw on this literature.

4.3 Cause-based organizations

The final context in which AI may impact philanthropic giving choices is that of individual cause-based organizations (e.g., charities, social enterprises, etc.). In these cases, the use of AI is unlikely to involve the design of philanthropy algorithms in the sense discussed above since the organization's interest (presumably) is not providing information or recommendations that maximize user satisfaction or facilitate giving in a generic sense but in maximizing their support. Cause-based organizations may, of course, still benefit from algorithms used by giving platforms or general-purpose information providers prioritizing them in search results or including them in recommendations. In this situation, do these cause-based organizations, as beneficiaries, bear any responsibility for concerns about algorithmic bias, loss of autonomy for users, or lack of transparency? Since we assume they neither designed the algorithms nor controlled their operation, these cause-based organizations are not directly responsible. However, if they are aware of the issues or have even engaged in practices that might exacerbate them (such as paying to be ranked higher in search results or participating in hyper-nudging initiatives where they stand to receive donations), then it might be argued that they are complicit to some extent and therefore bear a share of any moral responsibility.

Cause-based organizations may also face direct ethical issues if they use generative AI tools to produce content as part of their fundraising. Charities and nonprofits have always used emotive imagery and storytelling to appeal to people via the heart and the head, which has sometimes drawn criticism. In the context of international aid and development, for instance, there is a long-standing debate over whether depictions of aid recipients are patronizing and overly negative and whether this reflects problematic attitudes of "white saviorism" (Pieterse, 1992; Bhati, 2021). Similarly, disability rights campaigners have, at times, been vocally critical of the depiction of disabled people as objects of pity by nonprofit organizations (Longmore, 2015). These concerns will apply equally to content created using generative AI. In fact, they may even be exacerbated, as there are concerns that current AI image-generation tools demonstrate worrying levels of racial and gender bias, so their use may lead to the further perpetuation of problematic stereotypes (Lamensch, 2023; Small, 2023; Thomas & Thomson, 2023; Turk, 2023).

The capabilities of generative AI will bring other challenges, too. The fact that it is now possible to generate photo-realistic images or deepfake videos that are indistinguishable from real photos or video has led to concerns being raised about the potential impact this might have on notions of trust and authenticity (de Ruiter, 2021). For cause-based organizations, the risk of using generative AI content is that if done badly, it may have a significant negative impact on the perceptions of supporters and the wider public. In 2019, the UK charity Malaria No More UK successfully used deepfake technology to produce footage of the former footballer David Beckham reading out an appeal in nine different languages. It received broadly positive coverage (Davies, 2019). In early 2023, however, Amnesty International was heavily criticized for using AI-generated imagery to promote a report on police brutality in Colombia (Taylor, 2023). In the context of fundraising, there may also be reasons for caution when it comes to embracing generative AI: at least one study, for instance, has found that people are less likely to donate in response to a charitable giving advert if they become aware that AI-generated imagery has been used (Arango et al., 2023).

There are also wider ethical questions as to whether generative AI is inherently parasitic since it requires vast data sets of images, photographs, or text on which algorithms can be trained, which are only possible through the past efforts of human writers, artists, and creatives. Critics have accused companies at the forefront of the generative AI revolution of engaging in deliberate, large-scale copyright infringement to build their products, and this seems set to become a major issue for generative AI in the coming years, with several legal challenges already mounted and more likely to follow (Appel et al., 2023; Bearne, 2023). Again, this is not an issue for which charities or nonprofits bear direct responsibility, as they have no control over the development of commercial generative AI tools. They do, however, have a choice as to whether they use these tools or not. While broad concerns about copyright infringement and intellectual property rights are unlikely to be sufficient grounds by themselves for shunning generative AI, when added to the other ethical issues outlined already, it may be seen by some charities and nonprofits as sufficient grounds to question whether the use of generative AI is appropriate at all at this stage.

5 Conclusion

In this chapter, we have considered a range of ways in which AI could be used to shape individual choices and how these apply to different contexts in which decisions about philanthropic giving might be made. In doing so, we have identified several potential ethical concerns that funders and nonprofits need to be aware of as they contemplate using AI tools in this way. These ethical concerns and some of the key questions we need to ask as a result are summarized below:

Legitimacy, accountability, and transparency

- Is it clear to users that an algorithm determines the information or recommendations offered to them?
- Who designed the algorithm?
- What goal did they have in mind in designing the algorithm?
- Is this goal clear to the user?
- Where does their legitimacy of the goal derive from?
- Can the user challenge the algorithm or hold the designer to account?

Undermining agency

- Does the use of AI to create personalized choice architectures or hyper-nudges undermine the agency of individual donors?
- Is this an acceptable price to pay for encouraging prosocial behavior?

Bias

- Does using algorithms to provide information and recommendations that can shape philanthropic choice introduce the risk of bias against certain kinds of organizations or causes?
- Does the use of Generative AI bring the risk of bias (e.g., for race, gender, etc.), which could exacerbate existing concerns about how recipients of philanthropic funding are portrayed?

Erosion of authenticity and trust

- Does the use of generative AI to produce content (e.g., photographic imagery, video, text) for use in fundraising and campaigning bring the risk of contributing to an erosion of the notions of authenticity and trust in the online environment?

Intellectual property rights and training data

- Are current AI tools dependent on data sets that take advantage of prior human effort without suitable compensation or respect for intellectual property rights? Are nonprofit organizations that use these tools ethically compromised as a result?

Having identified these ethical issues, the question is what actions can be taken to address them. There is no single answer, but we can identify a range of current and future actions that can be taken by the various actors involved. Commercial platforms need to recognize the power they have to shape individual giving choices. They should seek to work with the nonprofit sector to minimize any potential harms that come from applying algorithmic processes to the provision of information and recommendations. Dedicated giving platforms are more likely to have pre-existing relationships with the nonprofit sector but should still recognize that their power as gatekeepers will increase as more and more giving takes places online and that they therefore have a responsibility to ensure that any applications of algorithms take into account the risks of undermining the agency of donors, or introducing biases that will adversely affect certain types of organizations or cause areas. Nonprofits and civil society organizations also need to be aware of the potential risks inherent

in their own use of AI tools – and ensure they put in place measures to mitigate against them. This may seem daunting for organizations that are often resource-starved, which is why philanthropic funders also have a vital role in providing them with the infrastructure and support they need to engage with issues of AI ethics. This could be done through relationships with individual grantees or by creating new pooled funds (such as the European Artificial Intelligence and Society Fund). Philanthropic funders can also play a valuable role in broader efforts to ensure the ethical and responsible use of AI, by engaging in research and advocacy that enables the perspectives and insights of civil society organizations they support to be brought into the debates.

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