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CGAP Occasional Paper

# Philanthropy education in the UK and continental Europe: Current provision, perceptions and opportunities

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**Charles Keidan**

Stanford University, July 2014

## Executive summary

### Aim of study

The aim of the study was to illuminate the scale and scope of philanthropy education in Europe today and highlight some of the key issues affecting the future development of the field. The study combines a mapping of educational provision with semi-structured interviews with 18 philanthropy 'stakeholders'.

The research addresses the following questions:

- 1 What is the *scale and scope* of teaching about philanthropy at European universities today?
- 2 What are some of the perceptions of the *needs, barriers and opportunities* for the development of philanthropy education?
- 3 What are some of the *implications* of the data for a) the future development of philanthropy education in Europe and b) further research in this area.

For the purposes of the research, philanthropy education is defined 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'.

Some key findings and insights were as follows:

### Key findings: mapping<sup>1</sup>

There is an embryonic philanthropy education sector emerging across Europe. This can be seen in a range of geographies and universities, within academic disciplines and centres, and in (primarily) postgraduate teaching on the subject.

#### 1 Geographic spread

Philanthropy education exists across Europe but is stronger in some regions and countries than others. Concentrations were most evident in Western European countries, especially the UK, Netherlands, Germany, Italy and France. Conversely, philanthropy education was virtually absent in northern Europe and in countries of the former Soviet Union, with the exception of Lithuania.

#### 2 Disciplinary spread

Philanthropy education is dispersed across a number of disciplines in the social sciences and the arts and humanities. Business is the predominant discipline within which philanthropy is taught.

#### 3 Educational level

Teaching about philanthropy primarily takes place at postgraduate level, in the form of individual elective courses and in the context of executive education.

<sup>1</sup> An at-a-glance table of philanthropy education in Europe is presented on page 18 of the full report.

#### 4 *Dedicated academic centres*

The emergence of academic centres and chairs in philanthropy reflects a small but growing critical mass of philanthropy education in Europe.

#### **Key findings: interviews**

##### *1 The importance of philanthropy:*

- Philanthropy has a growing role in public provision, including Higher Education.
- Philanthropy's importance to society increases the need for universities to build a knowledge base about philanthropy.
- Philanthropy course instructors and foundations show an appetite for more systematic teaching and research about philanthropy.

##### *2 What should be taught about philanthropy:*

- Teaching about philanthropy should draw on expertise from multiple disciplines.
- The imperative to provide vocational training for the philanthropy and non-profit sector was urged by some, whilst others emphasised the need for a broader approach centred on the history, philosophy and ethics of philanthropy.
- 'Student philanthropy' courses would be welcomed in Europe as an innovative approach to teaching, but there is scepticism about their fundability.

##### *3 Barriers and opportunities for philanthropy education:*

- University leaderships have not prioritised philanthropy research or education to date.
- Scholarship about philanthropy is not internally embedded or sufficiently valued in the academy. It frequently lacks academic and financial incentives or disciplinary rooting and student demand is unproven.
- Philanthropists and foundations have traditionally shown limited interest in supporting philanthropy research, which some perceive as navel-gazing or potentially raising awkward questions.
- Philanthropic funders are showing a growing interest in philanthropy research, reflecting greater professionalisation, introspection and scrutiny, but foundation funding in this area could create conflicts of interest.
- Philanthropy education presents multiple opportunities for universities, both at the institutional level – in terms of building donor relationships, understanding donor motivations and developing the skills of fundraisers – as well as at the scholarly level in terms of advancing academic knowledge.

# Part 1 Introduction

## 1.1 Aims and objectives

This research aims to capture the current state of teaching about philanthropy at European universities.<sup>2</sup>

It sets out to identify the countries, institutions and disciplines in which philanthropy education currently takes place, and the levels at which the subject is taught. In addition to mapping and surveying the teaching terrain, the research seeks to capture the perspectives of informed stakeholders, and to discuss some implications for the development of philanthropy education in Europe.

The paper addresses the following questions:

- 1 What is the *scale and scope* of teaching about philanthropy at European universities today?
- 2 What are some of the perceptions of the *rationale for philanthropy education and the barriers and opportunities* for its growth and development?
- 3 What are some of the *implications* of the data for a) the future development of philanthropy education in Europe b) further research in this area

The following audiences may find this study of particular interest:

- Academics and other experts researching and/or teaching about philanthropy, civil society, the non-profit sector, social innovation and related fields.
- University leaderships and foundations with an interest in either philanthropy as a subject of academic enquiry, or capacity building and development of fundraising and philanthropy fields.
- Philanthropic and Higher Education umbrella and advisory organisations, and research funding bodies.
- Those with an interest in the interface between philanthropy education and practice.
- Philanthropists and social entrepreneurs seeking opportunities at the intersection of philanthropy and Higher Education.

With these audiences in mind, the study aims to contribute to research on philanthropy, foster collaboration and interaction between universities and the philanthropic sector and inform debates about the development of philanthropy education in Europe.

<sup>2</sup> For a definition of teaching about philanthropy, see Section 1.4 below

## 1.2 Document outline

This document is divided into five parts.

**Part 1** introduces the aims, context and background to the research and outlines research definitions, sources and methods.

**Part 2** presents our findings on the scale and scope of teaching about philanthropy at European universities today. These findings, based on data collected from multiple sources, provide an in-depth look at current provision, and highlight notable developments, trends and models.

**Part 3** deepens this picture through interviews with informed stakeholders, comprising senior university staff, philanthropy course instructors, foundation professionals and advisors. These interviews highlight perceptions of the barriers and opportunities, and drivers of supply and demand, which shape the field.

**Part 4** concludes the study with some critical reflections about key debates, questions and directions for further research.

**Part 5** provides appendices, including a list of research informants and interviewees, references and author biographies.

## 1.3 Context of study

### The rise of philanthropy

Philanthropy – defined as private contributions of money or other resources with a primary goal to benefit the public good – has attracted growing attention in Europe from policymakers, non-profit organisations, infrastructure groups, wealth managers and donor advisors. One contributing factor has been that the wealth created over the last two decades across global markets has seen the assets of existing foundations grow as well as prompting a flow of new giving.

European philanthropy today is an independent source of income for the non-profit sector and an agent of social change in its own right. The growth of philanthropy mirrors the overall growth of civil society – the arena outside family, government, and market where people voluntarily associate to advance common interests. In the UK, it is estimated that civil society organisations employ 2.3 million people and eight per cent of the workforce, have an annual combined income of £181 billion and assets of £286 billion.<sup>3</sup>

Although there are considerable variations within and between countries, many EU national governments and institutions have encouraged the focus on philanthropy through the adoption of broadly pro-giving public policy frameworks. In the UK, for example, the introduction of the Gift Aid scheme by the Conservative government in 1990 increased the value of donations to charities by allowing them to reclaim the basic rate tax on gifts. The Gift Aid scheme was then popularised by a ‘Giving Campaign’ launched by the Labour administration. More recently, Westminster’s Conservative-led coalition government outlined its own aspirations for creating ‘new, sustainable social norms around giving’.<sup>4</sup> Forming part of the Government’s Big Society agenda,

<sup>3</sup> NCVO UK *Civil Society Almanac* <http://data.ncvo.org.uk/category/almanac/civil-society>

<sup>4</sup> Cabinet Office *Giving White Paper* p32 [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/78915/giving-white-paper2.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/78915/giving-white-paper2.pdf)

special emphasis was placed on the interface and interaction between localism and philanthropy.

As illustrated by developments in the Netherlands, where calls for a 'Participatory Society' were made within the 2013 King's Speech,<sup>5</sup> similar ideas resonate across Europe. However, not everyone has welcomed such shifts and philanthropy faces a number of contextual challenges. First of all, as government efforts to foster private giving and social action have often been accompanied by reductions in public spending and state action, some on the political left have seen attempts to promote giving as cover for an ideologically driven neo-liberal agenda that rolls back the responsibilities of the state and undermines post-1945 welfare settlements.<sup>6</sup> Indeed, governments' understanding of and engagement with philanthropy does not always appear to have been very reflective.<sup>7</sup> Furthermore, since the global economic recession in 2007 there have been major shifts in the nexus between the state and society, and a transition of the roles and responsibilities of the private, public and non-profit sectors. Examples range from the opportunities and anxieties created by realignments of state and society in Northern Europe, with its strong history of social welfare provisions, to the emergence of embryonic non-profit sectors and new forms of civil action and participation in the countries of the former Soviet Union following the collapse of Communism in 1989.

The shifting boundaries between state and society have become increasingly noticeable since the global economic recession in 2007. The economic downturn reduced the capacity and, in some cases, willingness, of governments to provide public goods and services and, in turn, stimulated renewed interest in the non-profit and for-profit spheres in providing these goods. Across the globe, the last few years have seen the formation of a new 'social economy', with overlapping and inter-locking roles of the state, market and civil society. Some have warned of the risks that accompany the blurring of boundaries.<sup>8</sup> The impact of technological change has also been highlighted and is captured in an emerging language of 'big data' and 'digital civil society'.<sup>9</sup>

The appropriate role and function of private philanthropy in this context has become central to public and political debate. 'Big' philanthropy conducted by wealthy families, often through the vehicle of charitable foundations and donor advised funds, is now the subject of considerable attention and debates.<sup>10</sup> At the same time, some of the world's richest people have become increasingly explicit about their philanthropy, perhaps best exemplified by the Gates-Buffett 'Giving Pledge'.<sup>11</sup> Its signatories – all billionaires – publicly commit the majority of their wealth to charitable causes during their lifetime or in their will.

<sup>5</sup> Steinglass M 'King's speech to parliament heralds end of Dutch welfare state', *Financial Times* <http://www.ft.com/cms/s/0/934952a6-1fad-11e3-aa36-00144feab7de.html>

<sup>6</sup> eg Sime M (2011) 'Big Society: a toxic brand', paper presented at the Big Society in Scotland Conference, 28 October. [www.scvo.org.uk/scvo-news/martin-simeaddresses-the-big-society-in-scotland-conference/](http://www.scvo.org.uk/scvo-news/martin-simeaddresses-the-big-society-in-scotland-conference/)

<sup>7</sup> Harrow J and T Jung (2011) 'Philanthropy is Dead; Long Live Philanthropy?', *Public Management Review*, 13(6)

<sup>8</sup> Bernholz L, Cordelli C, Reich R Good Fences: The Importance of Institutional Boundaries in the New Social Economy (Stanford PACS, 2013)

<sup>9</sup> Bernholz L Philanthropy and the Social Economy: Blueprint 2014 (Grantcraft, Foundation Centre, 2013)

<sup>10</sup> See for example, Broad W 'Billionaires with big ideas are re-shaping American science' *New York Times* (March 2014) [http://www.nytimes.com/2014/03/16/science/billionaires-with-big-ideas-are-privatizing-american-science.html?\\_r=0](http://www.nytimes.com/2014/03/16/science/billionaires-with-big-ideas-are-privatizing-american-science.html?_r=0); Buffett P 'The charitable-industrial complex' *New York Times* [http://www.nytimes.com/2013/07/27/opinion/the-charitable-industrial-complex.html?\\_r=0](http://www.nytimes.com/2013/07/27/opinion/the-charitable-industrial-complex.html?_r=0)

<sup>11</sup> <http://givingpledge.org>

## Growth of research and teaching on philanthropy

These developments have been accompanied by, and generated wider interest in, the study of philanthropy within university settings.

Given the strong history of philanthropic and associational life, high tax reliefs and well-developed planned giving products and donor advice infrastructure, such scholarly interest is strongest in the United States. The world's first major school of philanthropy, the Lilly Family School of Philanthropy,<sup>12</sup> opened at Indiana University in 2013, building on several decades of work by the university. The school is the first to offer degrees in philanthropic studies at undergraduate, postgraduate and doctoral levels. Elsewhere in the US, there are a growing number of interdisciplinary research centres and courses on philanthropy.<sup>13</sup> These courses take place across a range of disciplines. Many include an experiential component, sometimes referred to as 'student philanthropy', in which students assume philanthropic roles and practice real grantmaking.<sup>14</sup> Since 2011, the Once Upon a Time Foundation's Philanthropy Lab<sup>15</sup> has contributed over \$2.5 million to support student philanthropy education at US universities, reaching almost 1000 students. Reflecting this trend, the Stanford University Center on Philanthropy and Civil Society hosted a symposium that brought together course instructors, researchers and philanthropists for what it described as the 'largest ever convening' of philanthropy educators in 2013.<sup>16</sup> A follow-up meeting is planned for 2015 by which point it is expected that several online philanthropy courses or MOOCs will be operational. The US also benefits from a regularly updated database of non-profit management education compiled by Seton Hall University.<sup>17</sup> The Seton Hall database is particularly useful because non-profit management education is closely related to philanthropy education and often includes courses on philanthropy within its remit.

While less developed than in the US,<sup>18</sup> the last years have seen a growing European philanthropy research landscape. Since 2008, the European Research Network on Philanthropy (ERNOP)<sup>19</sup> has promoted inter-disciplinary collaboration and knowledge-sharing amongst philanthropy scholars and the non-profit sector, and a number of new research centres, such as the UK's Centre on Charitable Giving and Philanthropy (CGAP),<sup>20</sup> have emerged. However, within these developments, the scale and scope of university based philanthropy education has not been systematically defined or studied prior to this work. One of the aims of this study is to fill a basic gap in our knowledge by creating an up-to-date and accessible picture of current provision in Europe. That picture is set out in Part 2.

<sup>12</sup> <http://www.philanthropy.iupui.edu>

<sup>13</sup> See, for example, the Centre for Strategic Philanthropy and Civil Society at Duke University, cited here for its impressive database of US philanthropy modules and case studies and the Johnson Center for Philanthropy at Grand Valley State University.

<sup>14</sup> The following initiatives have contributed to a surge in student philanthropy across the US: Campus Compact, Northern Kentucky University's Mayerson Student Philanthropy Project, The Learning by Giving Foundation, ProjectU, The Philanthropy Lab

<sup>15</sup> <https://www.thephilanthroplab.org/default.aspx>

<sup>16</sup> <http://pacscenter.stanford.edu/content/philanthropy-educators-symposium>

<sup>17</sup> Non Profit Management Education database <http://academic.shu.edu/npol/>

<sup>18</sup> Schuyt T *Philanthropy and the Philanthropy Sector in Europe* (Ashgate, 2013) discusses some of the reasons for a European philanthropy, and philanthropy education lag, which are beyond the scope of this paper.

<sup>19</sup> <http://www.ernop.eu/>

<sup>20</sup> <http://www.cass.city.ac.uk/research-and-faculty/centres/cgap>

## Disciplinary settings for the study of philanthropy

The context within which philanthropy is researched and taught will shape its growth and development. To this end, it is useful to consider earlier debates about the disciplinary setting of the related field of Non-profit Management Education (NME).

In NME, discussions have revolved around its location in business, public administration and social work and the relative advantages of each area.<sup>21</sup> Alongside that, some scholars have identified a tension between 'internal management' on the one hand and broader public policy and social issues on the other. Giuliana Gemelli, founder of the Centre for Philanthropy and Social Innovation at Bologna University, has suggested that the emphasis on management as a disciplinary field is reflective of a process of professionalisation and demand for technical educational training.<sup>22</sup> These debates are instructive as the development of philanthropy education could follow similar trajectories to those of NME and be responsive to the needs of employers and practitioners.

Curricular guidelines produced by the Non-profit Academic Centres Council (NACC), originally designed for undergraduate courses on the non-profit sector and philanthropy, helpfully distinguish between broader knowledge and professional instruction.<sup>23</sup> These guidelines emphasise the dual role of creating curricula that provide a grounding in the historical and theoretical formation of philanthropy and civil society, *and* specific technical content related to foundation and non-profit management.

So what is the appropriate disciplinary setting for research and teaching about philanthropy? Theo Schuyt has highlighted the particular contributions of social science disciplines including social psychology, anthropology and economics.<sup>24</sup> However, there is no consensus amongst scholars. As an inter-disciplinary phenomenon, expertise from different disciplinary perspectives is essential. For example, historians might seek to understand the ways in which philanthropy has changed over time and how it operates in specific national and historical contexts. Economists can provide insights into how giving is affected by changing economic conditions and the ways in which it responds to incentives, a subject also of interest to behavioural psychologists. Political scientists and political philosophers can examine the relationship, and tensions, between philanthropy and justice, as well as the appropriate public policy and legal frameworks for charitable activity. Finally, business schools could provide a better understanding of the entrepreneurial aspects of philanthropy. In short, there are multiple types of knowledge that can be produced by the academy. What is produced will be influenced by internal factors related to the interests of individual scholars and external factors related to public and societal concerns, mediated by research bodies and private funders as well as the non-profit and philanthropy sectors. As the interviews in Part 3 indicate, these factors may influence the disciplinary setting and the research and teaching agenda and could place a premium on practical knowledge which enhances fundraising and grantmaking practice or is otherwise in demand from donors and other stakeholders.

<sup>21</sup> Mirabella R, Wish N (2000) 'The best place debate: A Comparison of Graduate Education Programs for Non-profit Managers' *Public Administration Review* 60, p3

<sup>22</sup> Mirabella R, Gemelli G, Malcolm M, Berger, G (2007) 'Non-profit and Philanthropic Studies: International Overview of the Field in Africa, Canada, Latin America, Asia, the Pacific, and Europe' *Non-profit and Voluntary Sector Quarterly* 36:4

<sup>23</sup> Non-profit Academic Centers Council (NAAC), *Curricular guidelines for Undergraduate Study in Non-profit Leadership, Non-profit sector and philanthropy* (First edition, 2007)

<sup>24</sup> Schuyt T (2013) *Philanthropy and the Philanthropy Sector: An Introduction* Ashgate

## Existing mapping literature and resources

Existing mapping literature and studies have proved indispensable to this research.

The online database of non-profit management education hosted by Seton Hall University is the most comprehensive resource on the subject.<sup>25</sup> As of April 2014, the database identified 344 universities in the US offering courses on non-profit management education (NME).<sup>26</sup> This compares to 240 courses offered by universities in 2007, and to 179 in 1996.<sup>27</sup> Graduate-level courses also increased by 25 per cent between 1996 and 2006.<sup>28</sup> This growth reflects a demand for employment-based skills in the non-profit sector and, more broadly, for professional education itself.<sup>29</sup> As an area closely related to philanthropy education, these insights provide clues about potential sources of demand for courses on philanthropy, the educational level at which they might be offered, and possible disciplinary settings.

In a related database, the Benchmarking Non-profit and Philanthropy Educational Programmes database (BENPHE) project sought to capture comparable data about NME and philanthropy courses in Europe. Two key insights emerged from this research. First, that the growth of non-profit organisations in Europe has been accompanied by a growth in the number of education and training programmes. Second, the relative dominance of non-profit education and obscurity of philanthropy within that. In her analysis of the European situation, Giuliana Gemelli put it as follows: 'The main European feature is asymmetry between the large number of programmes on non-profit organisations and the very limited number of programmes in philanthropy.'<sup>30</sup> However, although it yields useful insights, the Seton Hall database's applicability is limited due to its focus on US provision and the BENPHE resource is now difficult to access and out-of-date. Most importantly, as discussed below, these resources, in common with other listings, do not distinguish between philanthropy education in particular and non-profit education in general. Other useful sources and reference points include the Voluntary Sector Studies Network (VSSN) which contains a listing of voluntary sector studies courses in the UK, including those focused on philanthropy.<sup>31</sup> The European Research Network on Philanthropy (ERNOP) highlights philanthropy-related research being conducted across Europe, but does not include course listings.<sup>32</sup>

One area of the academic literature where there is a specific focus on philanthropy education is in relation to the predominantly US phenomenon of university-based 'student philanthropy'. Almost absent in Europe, student philanthropy is the practice of real grantmaking by students either as part of a professional training course or in a disciplinary specific location. The substantial growth of both programmes and research in this area reflects a shared appetite among private funders and Higher Education institutions to promote student philanthropy and understand its impact.<sup>33</sup> Research

<sup>25</sup> <http://academic.shu.edu/np/>

<sup>26</sup> <http://academic.shu.edu/np/list.php?sort=name>

<sup>27</sup> Mirabella R (2007) 'University-Based Educational Programs in Non-profit Management and Philanthropic Studies: A 10-Year Review and Projections of Future Trends' *Non Profit and Voluntary Sector Quarterly* 36:4

<sup>28</sup> *ibid*

<sup>29</sup> *ibid*

<sup>30</sup> Mirabella R, Gemelli G, Malcolm M, Berger, G (2007) 'Non-profit and Philanthropic Studies: International Overview of the Field in Africa, Canada, Latin America, Asia, the Pacific, and Europe' *Non-profit and Voluntary Sector Quarterly* 36:4

<sup>31</sup> <http://www.vssn.org.uk/courses>

<sup>32</sup> <http://ernop.eu/>

<sup>33</sup> Private funders include the Learning by Giving Foundation (Buffett), The Philanthropy Lab (Raynor), Project U (Arrillaga) and Mayerson Foundation. Other support has come from Campus Compact, Pay it Forward and other service learning initiatives.

has examined different types of student philanthropy programmes, the effectiveness of these programmes over the short and long term, and the purpose(s) they are intended to serve, especially in relation to fostering civic participation and cultivating professional skills.<sup>34</sup>

In Europe, the most detailed study of philanthropy education was written by David Carrington and published in 2009.<sup>35</sup> The report examined the philanthropy 'knowledge landscape', based on interviews with over 40 informants across Europe. Structured in four parts, Carrington's work first of all highlighted views on the extent of learning and use of research within the philanthropic and foundation sector. Second, it offered perspectives on the timeliness of the study at a moment of growing interest in philanthropy. Third, it identified some of the barriers to increasing philanthropy research and teaching. Finally, the author set out a vision, between 5–7 years after the inception of the report, of a thriving ecosystem of learning and teaching resources informing philanthropy practice. A follow-up to this work was published in 2012, focused directly on the experience and needs of philanthropy practitioners.<sup>36</sup>

Carrington's report highlighted considerable challenges and opportunities, especially the need to bridge gaps between academics and practitioners, create a shared language around European philanthropy, build a philanthropy education 'marketplace' and increase the production and access of data. In so doing, the report provided useful insights into the necessary interventions and investments that would help to overcome some of the challenges. However, due to resource constraints, the report did not provide detailed data on existing educational provision. Its initial audit identified 115 university-based centres in Europe that provide 'some form of research and teaching that could be relevant to the philanthropic sector' but states that 'it was often difficult to unpick within all this data the research work or teaching activity which met the definition of philanthropy that this project has used'.<sup>37</sup> Much of the effort of the current study, as set out in Part 2, is precisely to unpick this content and provide a benchmark of existing provision. It is hoped that this will be complementary to the interpretive insights and interview data contained in Carrington's report as well as material from interviews summarised in Part 3.

### **Conceptualising the non-profit space**

As noted above, existing resources rarely distinguish between courses on philanthropy in particular and those on non-profits in general. The tendency to subsume teaching about philanthropy within the orbit of teaching about non-profits, and especially the management of non-profits, reflects a wider challenge in conceptualising the non-profit space. How should the various domains and spheres of the 'non-profit' field, including non-profit management education, voluntary sector studies, civil society studies, social entrepreneurship and philanthropy fit together? One intriguing and prescient suggestion made by Giuliana Gemelli in 2007 was that a growing interest in social entrepreneurship and social investment may help overcome 'the big divide' between non-profit organisations and philanthropy.<sup>38</sup> Other scholars have highlighted the

<sup>34</sup> See, for example, Olberding J (2012) *Does Student Philanthropy Work? A Study of Long Term Effects of the 'Learning by Giving' Approach*, Innovative Higher Education and also Campbell D (2014) 'Practicing Philanthropy in Higher Education: Cultivating engaged citizens and non-profit sector professionals' *Journal of Public Affairs Education*

<sup>35</sup> Carrington D (2009) *The Application of Learning and Research to the Practice of Philanthropy*

<sup>36</sup> Symonds J, Weisblatt K and Carrington D (2013) *Shedding Light on Our Own Practice* Alliance Publishing Trust

<sup>37</sup> Carrington D (2009) *The Application of Learning and Research to the Practice of Philanthropy*, p3

<sup>38</sup> Mirabella R, Gemelli G, Malcolm M, Berger, G (2007) 'Non-profit and Philanthropic Studies: International Overview of the Field in Africa, Canada, Latin America, Asia, the Pacific, and Europe' *Non-profit and Voluntary Sector Quarterly* 36:4

amorphous and fragmented nature of the space, and the risk of what Antonin Wagner calls 'paradigm confusion'. Wagner articulates the need to distinguish between the origins of ideas of civil society on the one hand, and the third sector on the other as one antidote to this confusion.<sup>39</sup> Moreover, Siobhan Daly has pointed to the inherent ambiguity of the term philanthropy itself, drawing on typologies of essentially contested concepts articulated by W B Gaille.<sup>40</sup>

### The focus on philanthropy education

Notwithstanding these challenges, there are several compelling rationales for the specific focus on philanthropy education, whilst allowing for its multi-disciplinary rooting and its distinctive position within the non-profit sphere.

First, the specific focus on philanthropy is justified by its growing scale and influence. Its relative independence from both state and market raises important questions for researchers about its roles, functions and accountability in liberal democracies.<sup>41</sup> Government retrenchment has sharpened these developments and generated interest in philanthropy's involvement in addressing social issues.<sup>42</sup> The volume of private money for public purposes, the growing infrastructure around giving including private banks, family offices, advisory services and member associations all reflect the need for greater scholarly attention to understand its emerging significance.<sup>43</sup>

A second reason for treating and defining philanthropy education distinctly is that it enables us to home in on philanthropy's unique characteristics and bring them into sharper focus. The picture and structure of philanthropy education is likely to become clearer as a distinct body of knowledge about philanthropy emerges. That body of knowledge is likely to be inter-disciplinary in nature but will treat philanthropy as an institution in its own right as well as a source of income for the non-profit sector. This will help avoid the risk of conceptual slippage that can occur when philanthropy is conflated with related concepts such as fundraising or related fields such as social entrepreneurship or non-profit management.

Third, there is a growing demand for knowledge about philanthropy from both theoretical and practical perspectives.<sup>44</sup> The interest generated by the *Family Foundations Giving Trends* series, which analysed the spending of the UK's largest foundations, and the *Million Pound Donors* reports were early indicators of this appetite.<sup>45</sup> The professionalisation of foundations in countries as diverse as Portugal, Germany, Switzerland, Netherlands, France and the UK have also increased demand for relevant education, research and training. These developments make a study of philanthropy education provision timely.

<sup>39</sup> Wagner A (2012) 'Third sector vs civil society: a critical discourse relating to intermediate organisations' *Voluntary Sector Review*

<sup>40</sup> Daly S (2012) 'Philanthropy as an Essentially Contested Concept' *Voluntas: International Journal of Voluntary and Non-profit Organizations* vol 23, no 3

<sup>41</sup> See Prewitt, K et al 'The Legitimacy of Philanthropic Foundations' (2006, Russell Sage Foundation) for a discussion of foundations' relative freedom as private actors for the public good; and Reich R 'What are foundations for?' (2013, *Boston Review*) for a discussion of foundations' 'awkward' role in a democracy.

<sup>42</sup> eg Almog-Bar M and Zychlinski E (2012) 'A Facade of Collaboration: Relationships between philanthropic foundations and the government in social policymaking in Israel' *Public Management Review* 14,6, pp 795–814

<sup>43</sup> eg Eikenberry A M (2006) 'Philanthropy and Governance' *Administrative Theory & Practice* 28,4, pp 586–592

<sup>44</sup> This trend was identified in David Carrington's report in 2009 and the interest in philanthropy has grown in the intervening period.

<sup>45</sup> Pharoah C and Keidan C *Family Foundation Giving Trends* Alliance Publishing Trust; and Breeze B *Coutts Million Pound Donors Report*

Whilst a renewed focus on philanthropy education is compelling, the relationship between philanthropy and fundraising needs careful attention. The place of fundraising and fundraising education alongside philanthropy and philanthropy education raises conceptual and terminological questions. In some ways, fundraising is the inverse of philanthropy. If philanthropy is the 'giving', then fundraising is the 'getting'. In that sense, both the practices, and the study of the practices, are symbiotic, mutually supporting and pedagogically linked. But viewed from another perspective, philanthropy is a site of relational and expressive behaviour with its own institutions, traditions, values and norms quite separate from fundraising. These overlaps – and differences – suggest that vigilance is required when designing academic courses, to avoid the risk of paradigm confusion noted above.<sup>46</sup>

For the sake of consistency, this study did not include courses or training on fundraising under the rubric of philanthropy education. The number of university-based fundraising courses and training in Europe is currently limited so, in practice, the exclusion of fundraising courses does not significantly change the overall picture. However, the demand for funding and need to recruit and retain fundraising staff with specialist skills is likely to increase the provision of courses on fundraising, either university or consultancy-based. In turn, this may increase the entanglement of fundraising and philanthropy, already visible across the fundraising sector.

## 1.4 Definitions and terminology

For the purposes of this research, philanthropy education is defined 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'.<sup>47</sup> The definition is applied using the following criteria:

- Degrees and courses with 'philanthropy' in the title at Higher Education institutions within the European Union.
- Courses where teaching about philanthropy constitutes a significant proportion of the curriculum.
- Courses identified by the instructor as teaching about philanthropy, subject to the above.
- Courses offered by self-identified academic centres and chairs of philanthropy, subject to the above.

The contribution of time through volunteering is excluded to limit the scope of the project to manageable proportions.

To most accurately capture the subjects of enquiry, the terms *teaching about philanthropy*, *teaching of philanthropy*, and *philanthropy education* are used throughout the research.

*Teaching about philanthropy* is specific: it focuses on where and how philanthropy is *taught* rather than where it is *researched*, whilst acknowledging the major overlap between the two. It is also neutral: the project aims to understand philanthropy

<sup>46</sup> The recently created 'Johns Hopkins Medicine *Philanthropy* Institute' in the US illustrates this point. It has philanthropy in the title but is focused on fundraising research and practice.

<sup>47</sup> This is close to the European Research Network On Philanthropy (ERNOP) definition of philanthropy as 'voluntary private contributions of money, time or other resources with a primary goal to benefit the public good'.

education without casting judgement on whether philanthropy should be promoted or whether the study of the subject should be located within specific disciplines. For this reason, these terms were preferred to *teaching philanthropy*, which could have more directive or vocational connotations.

## 1.5 Research challenges, sources and method of analysis

### Research challenges

The focus on philanthropy education brought numerous challenges to the *process* of the research:

First, there was no single source of data on philanthropy education in Europe. Rather, data had to be gathered from multiple sources, listings and languages. Data was often located within domains of study such as non-profit management and voluntary sector studies, which have achieved a greater level of academic specialisation. Thus, philanthropy education had to be *disaggregated*. Sometimes, it also had to be *discovered*, buried within degrees and other courses on the voluntary sector and only illuminated through correspondence with research informants.

Second, the very limited provision of philanthropy education, especially in some parts of Europe, resulted in a small sample. As such, the study is of an exploratory rather than exhaustive nature.

Third, the meaning of philanthropy in Europe is not uniform. Philanthropy in the UK, for example, closely resembles the American tradition and is more often compared with the US than continental Europe. In the Netherlands, the idea of philanthropy generally applies to the non-profit sector as a whole, including fundraising organisations. Elsewhere, philanthropy has negative connotations, even those with strong traditions of giving. This is significant because the terminology of philanthropy was employed at the heart of this research. Sometimes the use of related terms such as 'giving' or 'foundations' were helpful in mitigating this challenge. The varying degrees of comfort and familiarity with the term inevitably affect educational provision. A major challenge was identifying a common barometer of philanthropy, and gathering consistent data about where it was taught across Europe, when different meanings and attitudes are ascribed to philanthropy both within and between countries.

Finally, time constraints meant that it was not possible to cover the whole European landscape comprehensively, particularly where data was less accessible. Whilst this research aims to provide a helpful starting point and a contribution to an evolving picture, the data is incomplete and uneven in some places. Where that is the case, reference is made to the relevant omission.

### Sources

In order to gather data relating to the scale and scope of teaching about philanthropy at European universities, the following research approach was adopted:

First, existing published research and the 'mapping' literature was reviewed, as described above.

Second, an extensive online search of philanthropy courses was conducted. Multiple search terms included: philanthropy, giving, grantmaking, foundation, stiftung,

non-profit, education, teaching, courses, module, degree, centre, Europe, university, Higher Education institution, business school.

Third, various listings of educational provisions were reviewed. These included: prospects.ac.uk and UCAS, which contain searchable databases of course listings for British universities; Voluntary Sector Studies Network (VSSN), which lists courses on the UK voluntary sector including on philanthropy; the European Research Network on Philanthropy (ERNOP), referred to above, which provides country-specific information and a platform for research collaboration; Benchmarking Non Profit and Philanthropy Educational Programmes (BENPHE), courses listing; information from the European Foundation Centre; and the appendix of David Carrington's 2009 report *The Application of Learning and Research to the Practice of Philanthropy*, information from philanthropy centre websites and research informants from across the continent.

Fourth, the researcher reviewed the websites of dedicated academic centres and chairs of philanthropy operating at universities across Europe.

Fifth, academic informants who research and/or teach about philanthropy were contacted to share course materials and elaborate on specific questions related to published information.

Finally, to deepen this understanding, 18 semi-structured interviews were conducted with stakeholders, comprising senior university staff, foundation directors, philanthropists, academics and philanthropy course instructors.

Data was collected on 20 countries in total. This included 18 out of 28 member states of the European Union, and two non-EU member states, Norway and Switzerland. Due to limitations of time and capacity, the research did not include the following countries: Bulgaria, Cyprus, Croatia, Greece, Hungary, Luxembourg, Malta, Poland, Romania, Slovakia and Slovenia. Data was analysed and then tabulated within the following domains:

- country
- university
- centre
- degree
- course
- training
- discipline
- level

### **Method of analysis**

The basic unit of analysis for philanthropy education in Europe was data gathered under the following headings: country, university, academic centre, degree, course, training, discipline, educational level and qualification. Further details on philanthropy course modules and professional training were then collected. Where available, links to these modules are provided in the text. Where specific information was not available, this is noted in the text or footnotes.

As this study represents a first attempt at capturing current provision, there are significant gaps and omissions; the findings represent a work in progress and are a presentation of the information which it was possible to collect within the resources and timeframe of this study. They are intended as a contribution to an evolving picture rather than a definitive index. Drawn in early 2014, this picture of the European philanthropy education landscape will require updating as provision evolves in the years ahead.

# Part 2 Scale and scope of philanthropy education in Europe

## 2.1 Introduction

This part presents and analyses the landscape of university-based philanthropy education in Europe and investigates the stage of development and degree of specialisation that exist today. The research findings reveal a sparse but not barren landscape. The continent is home to academic centres and chairs on philanthropy, research networks and a scattering of courses, modules and executive training. However, in some parts, there was limited evidence of philanthropy education. ‘Not much here’ was a common refrain, especially in Eastern and Northern European countries. Yet philanthropy education was still discernible both in the educational provision of closely related subjects, such as non-profit management, voluntary sector studies or social entrepreneurship, and within disciplines such as history, economics and political science where scholars took a specific interest in the subject.

## 2.2 At a glance: Philanthropy education in Europe

Table 1 below provides a snapshot of philanthropy education in Europe today. It shows the countries and universities where teaching about philanthropy takes place and the kinds of provision offered including academic centres, degrees, courses and professional training. Stand-out findings include:

- Over half the countries surveyed (11 out of 20) offer some university-based philanthropy education.
- 24 Higher Education institutions offer some philanthropy education provision, including 20 unique course modules and 16 professional training courses.
- There are three universities offering Masters degrees in philanthropy or degrees in which philanthropy was a core component.
- There are eight dedicated academic centres of philanthropy, the majority of which were established since 2000.
- There are two academic chairs in philanthropy.

**Table 1: Philanthropy education at a glance<sup>48</sup>***Key to symbols:***P** provision is present**x** available data indicated no provision at time of study**–** no data collected for this country

Country	University	Centre/Chair on philanthropy	Degree in philanthropy	Course(s) in philanthropy	Professional training
<b>Austria</b>	Vienna University of Economics and Business	x	x	P	x
<b>Belgium</b>	University of Liege, HEC Management School	P	x	P	x
<b>Bulgaria</b>		–	–	–	–
<b>Croatia</b>		–	–	–	–
<b>Czech Republic</b>		x	x	x	x
<b>Cyprus</b>		–	–	–	–
<b>Denmark</b>		x	x	x	x
<b>Estonia</b>		x	x	x	x
<b>Finland</b>		x	x	x	x
<b>France</b>	ESCP Business School	x	x	P	x
	ESSEC Business School	P	x	P	x
	Sciences Po	x	x	P	x
	HEC School of Management	x	x	P	x
<b>Germany</b>	European Business School	x	x	x	P
	Jena University	x	x	x	P

<sup>48</sup> See sections 1.5 and 2.2 above for further information on how data was collected. The Centre for Sustainable Philanthropy at Plymouth University was established in early 2014 shortly after the conclusion of the data collection process. The Centre includes a Professorship in Philanthropic Psychology as well as teaching, training and other activities.

Country	University	Centre/Chair on philanthropy	Degree in philanthropy	Course(s) in philanthropy	Professional training
	University of Heidelberg	P	x	x	P
	University of Munster	x	x	P	P
<b>Greece</b>		–	–	–	–
<b>Hungary</b>		–	–	–	–
<b>Italy</b>	Bologna University	P	P	P	x
<b>Latvia</b>		x	x	x	x
<b>Lithuania</b>	LCC International University	P	x	P	P
<b>Luxembourg</b>		–	–	–	–
<b>Malta</b>		–	–	–	–
<b>Netherlands</b>	VU University Amsterdam	P	x	P	P
	Erasmus University Rotterdam	P	x	x	P
	Windesheim University	x	x	P	P
<b>Norway</b>		x	x	x	x
<b>Poland</b>		–	–	–	–
<b>Portugal</b>	University Institute of Lisbon	x	x	x	P
	University of Lisbon	x	x	x	P
<b>Republic of Ireland</b>		x	x	x	x
<b>Romania</b>		–	–	–	–
<b>Slovakia</b>		–	–	–	–
<b>Slovenia</b>		–	–	–	–
<b>Spain</b>	CEU San Pablo University	x	x	x	P
<b>Sweden</b>		x	x	x	x
<b>Switzerland</b>	University of Basel	P	x	P	P

Country	University	Centre/Chair on philanthropy	Degree in philanthropy	Course(s) in philanthropy	Professional training
UK	City University Cass Business School	P	P	P	P
	Northumbria University	x	P	P	x
	University of Cambridge Judge Business School	x	x	x	P
	University of Kent	P	x	P	x
	University of St Andrews	x	x	P	x

## 2.4 Philanthropy education by country

Philanthropy education is most developed in France, Germany, Italy, Netherlands and UK. In Austria, Belgium, Italy, Lithuania, Portugal and Spain, limited teaching about philanthropy takes place. In most Northern and Eastern European countries, philanthropy education was only discernible within related subjects or altogether absent. France, Lithuania, Netherlands and the UK are featured in more detail in Section 2.9 below.

**Table 2: Status of philanthropy education by country<sup>49</sup>**

A cumulative points system was used to gain a basic understanding of the distribution and extent of philanthropy education provision across Europe. Points were awarded as follows:

- 1 point per philanthropy degree
- 1 point per centre/chair
- 1 point for each course offered by a university
- 0.5 per training

Country	Provision
UK	11
Netherlands	6.5
France	5
Germany	4

<sup>49</sup> The figures in Tables 2 and 3 are provisional and could change between the research collection period and date of publication. Employing a more expansive definition of philanthropy and/or including philanthropy research would also alter these scores.

Country	Provision
Italy	4
Switzerland	3.5
Lithuania	2.5
Belgium	2
Portugal	1
Austria	1
Spain	0.5
Czech Republic, Denmark, Estonia, Finland, Latvia, Norway, Republic of Ireland, Sweden	–

The UK, Netherlands, France, Germany and Italy offer the most teaching about philanthropy and foundations. All these countries possess academic centres or chairs underpinning their educational provision. Even in countries where no specific provision is identified, teaching about philanthropy exists, albeit in more limited forms – most often within the framework of courses on non-profit management, the voluntary sector, public policy and social economy.

## 2.5 Philanthropy education by university

A cumulative points system was also used to identify concentrations of philanthropy education within specific universities. Points were allocated as follows:

- 1 point per philanthropy degree
- 1 point per centre/chair
- 1 point for each course offered by a university
- 0.5 per training

**Table 3: Philanthropy education provision by university**

University	Amount
City University, Cass Business School	4.5
Bologna University	4
University of Basel	3.5
Northumbria University	3
VU University Amsterdam	3
LCC International University	2.5
ESSEC Business School	2
Erasmus University Rotterdam	2
University of Kent	2
University of Liege, HEC Management School	2

University	Amount
University of Heidelberg	1.5
University of Muenster	1.5
Windesheim University	1.5

City University London had the strongest philanthropy teaching concentration in Europe. Its provision includes a Masters degree, courses modules and accredited professional training. Bologna University (Italy), University of Basel (Switzerland), Northumbria University (UK) and VU University (Netherlands) also had significant concentrations. Other universities such as the University of Kent and Erasmus University Rotterdam, which have philanthropy centres only five years old, show potential to grow significantly in the coming years.

## 2.6 Dedicated academic philanthropy centres and chairs

The presence of philanthropy centres and chairs are an important indicator of the development of a specialisation in philanthropy. They provide stability and an organisational base for research and teaching.

**Table 4: Summary of dedicated philanthropy centres**

Country	University	Centre/Chair	Discipline
<b>Belgium</b>	University of Liege, HEC Management School	Baillet-Latour Chair in Social Investment and Philanthropy	Management
<b>France</b>	ESSEC Business School	ESSEC Chair in Philanthropy	Business
<b>Germany</b>	University of Heidelberg	Centre for Social Investment	Various
<b>Italy</b>	Bologna University	Philanthropy and Social Innovation Research Centre	History
<b>Lithuania</b>	LCC International University	Institute for Philanthropy	To be determined
<b>Netherlands</b>	Erasmus University, Rotterdam	Erasmus Centre for Strategic Philanthropy	Management/ Economics
<b>Netherlands</b>	VU University, Amsterdam	Centre for Philanthropic Studies	Social Science
<b>UK</b>	City University, Cass Business School	Centre for Charitable Giving and Philanthropy	Business
<b>UK</b>	University of Kent	Centre for Philanthropy	Social Science
<b>Switzerland</b>	University of Basel	Centre for Philanthropy Studies	Economics

As Table 4 above shows, there are 10 academic centres or chairs in philanthropy spanning eight countries across Europe. This suggests potential for deepening interaction, creating synergies and fostering collaboration across the continent and

beyond in the years ahead. However, there is considerable variation in size, remit and capacity across these centres and chairs. For example, the Centre for Social Investment in Heidelberg is well established and has conducted considerable research on foundations but its current teaching on the subject is limited. The Chair in Philanthropy at ESSEC is a significant innovation in the French landscape but is currently structured on rolling terms rather than on an endowed basis. The Institute for Philanthropy at LCC in Lithuania had just been established at the time of research so its trajectory and direction will be clearer by 2015.

## 2.7 Philanthropy courses, degrees and training

Courses, degrees and training comprise basic units of higher education teaching. Philanthropy education within these units is set out below. To be counted as philanthropy education, philanthropy had to be included in the title of the provision and/or be a core component.

### Courses

The research identified 20 courses on philanthropy at 16 Higher Education institutions across Europe. Table 5 below lists these courses.

**Table 5: Philanthropy courses**

Country	University	Lead discipline	Course title	Level and qualification
<b>Austria</b>	WU Vienna University of Business and Economics	Business	Societal Perspectives on Nonprofit management	UG
<b>Belgium</b>	University of Liege, HEC Management School	Business	Foundations and Philanthropy: From Theory to Action	PG Masters
<b>France</b>	HEC School of Management, Paris	Management	Philanthropy Management	PG Masters
	ESCP Business School, Europe	Management	Philanthropy and Social Entrepreneurship	PG Masters
	ESSEC Business School	Business	Philanthropy: Strategy and Impact	PG Masters in Management
	Sciences Po	Social Science/ Public Policy	New Philanthropy, Public Policy and Development	PG Masters in International Public Management

Country	University	Lead discipline	Course title	Level and qualification
	Sciences Po	Economics	New Philanthropy and Social Investing	PG Masters in Economics and Business
<b>Germany</b>	University of Munster	Social Science	Foundation Management	PG Masters of Non-profit Administration
<b>Italy</b>	Bologna University	History	History of Philanthropy and Non Profit Organisations	PG Masters in Philanthropy and Social Innovation
<b>Lithuania</b>	LCC International University	General Studies	Civil Society and Philanthropy	UG
<b>Netherlands</b>	VU University Amsterdam	Social Science	Charitable Causes, Non-profits, and Philanthropy	UG
	Windesheim University	Business	Fundraising, Grant Making and Sponsorship	UG
<b>Switzerland</b>	University of Basel	Economics	Foundation Management and Corporate Philanthropy	UG BSc
	University of Basel	Economics	Colloquium on Foundations	UG BSc
<b>UK</b>	City University London, Cass Business School	Business	Principles and Practices of Grant-making	PG MSc, Grantmaking, Philanthropy and Social Investment
	City University London, Cass Business School	Business	Management of Grant-making	PG MSc, Grantmaking, Philanthropy and Social Investment
	Northumbria University	Social Science	Philanthropy, Giving and Volunteering	PG MSc, International Development with Philanthropy

Country	University	Lead discipline	Course title	Level and qualification
	Northumbria University	Arts	Philanthropy and Fundraising	PG MA, Cultural Management
	University of Kent	Social Science	Fundraising and Philanthropy	PG MA
	University of St Andrews	Management	Philanthropy and Philanthropreneurs – the business of doing good	UG MA, MSC

## Degrees

Table 6 below lists degrees that could be conceivably characterised as philanthropy degrees, or where the study of philanthropy education is a core component. Three degrees were identified. The masters in International Development with Philanthropy at Northumbria University is notable for situating the study of philanthropy within a specific subject area, in this case international development.

**Table 6: Philanthropy degrees**

Country	University	Degree Title	Centre	Discipline	Level
<b>Italy</b>	Bologna University	Philanthropy and Social Innovation	Philanthropy and Social Innovation Research Centre	History	PG MA, PhD
<b>UK</b>	City University London, Cass Business School	Grant making, Philanthropy and Social Investment	Centre for Charity Effectiveness/ Centre for Charitable Giving and Philanthropy	Business and Management	PG MSc
<b>UK</b>	Northumbria University	International Development with Philanthropy	N/A	Faculty of Arts, Design and Social Sciences	PG MSc

## Professional training and executive education

The final part of the educational equation is postgraduate-level professional training and executive education. The research identified 14 Higher Education institutions offering 16 professional training programmes.

**Table 7: Professional training on philanthropy**

Country	University	Professional training/ executive education	Qualification
<b>Germany</b>	European Business School, Frankfurt	Foundation Management	Certificate
	Jena University	Foundation Law	Certificate
	University of Heidelberg	Foundation Management	Certificate
	University of Munster	Foundation Management	Certificate
<b>Lithuania</b>	LCC International University, Klaipeda	Philanthropy	Certificate
<b>Netherlands</b>	Erasmus University Rotterdam	Summer Academy for Foundations	Certificate
		Governing Philanthropic Foundations	
	VU University Amsterdam	Philanthropic Studies Governing Philanthropic Foundations	Certificate
	Windesheim University	Fundraising, Grant Making and Sponsorship	Certificate
<b>Portugal</b>	ISCTE – University Institute of Lisbon	Competence Centre for the Foundation Sector	Certificate (6 ECTS credits)
	University of Lisbon	Foundation Law in Portugal	Certificate
<b>Spain</b>	San Pablo University (CEU) Madrid	Management of Foundations	Certificate
<b>Switzerland</b>	University of Basel	Foundation Management	Certificate
<b>UK</b>	University of Cambridge, Judge Business School	Endowment Asset Management	Certificate
	City University London, Cass Business School	Grant making, Philanthropy and Social Investment	Certificate, Diploma

All training courses award certificates of participation and some also offer ECTS or other credits. Reflecting a practitioner focus, the majority of the courses focused on the management of philanthropic foundations. A training course on endowments at Cambridge University's Judge Business School was seemingly unique in its exclusive focus on the use of foundation assets. The growing interest in mission-related investment, social investment and impact investing, as well as scrutiny of foundation investments, may increase demand for expertise in this area in the coming years.

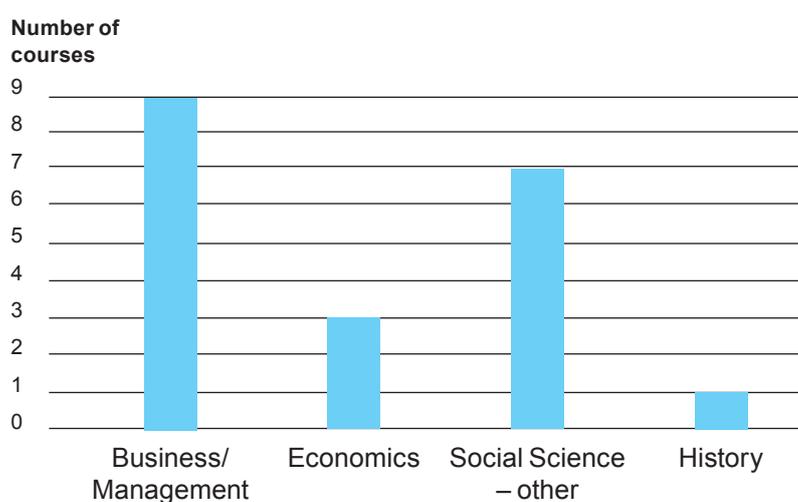
## Educational level

There is a bias in current provision towards postgraduate-level education. Of the 20 courses listed in Table 5 above, 13 were postgraduate, and seven were undergraduate. The educational orientation towards postgraduate-level study, combined with the disciplinary bias towards management noted below could reflect a more vocational orientation to current philanthropy education in Europe today.

## 2.8 The disciplinary settings

Philanthropy is predominantly researched and taught within established academic disciplines as it is a domain of study rather than an academic discipline in its own right. Figure 1 below lists the major disciplines in which philanthropy is taught.

**Figure 1: Philanthropy courses by academic discipline**



The research indicates a strong orientation towards business and management. Nine out of 20 courses were offered within these disciplines, with a further three courses situated in economics. Excluding economics, seven other courses were offered in social and political sciences, and public policy contexts. Humanities subjects, such as literature, art and history, were barely represented in current provision. The historical orientation of philanthropy courses at Bologna University proved the exception.

This picture is mirrored in academic chairs and centres. The two Chairs in Philanthropy at ESSEC and HEC Liege are based in business schools. Meanwhile three of the seven philanthropy centres (Basel, Erasmus and City) are based in business, management and/or economics, two (Kent and VU, Amsterdam) in social science disciplines, one in history (Bologna) and one to be determined (LCC).

The disciplinary setting in which philanthropy is anchored is significant because of its bearing on the type of questions asked, the choice of topics studied and ultimately, the production and dissemination of knowledge about philanthropy. This is discussed further in Part 4.

## 2.9 Country portraits

To deepen our perspective at country level, philanthropy education in France, Lithuania, Netherlands and the UK were considered in more detail. These countries were selected because of the availability of data, the contrast and balance of characteristics and the strength of concentration.

### France

Although teaching about philanthropy in France is still confined to a limited number of scholars and practitioners, some advances have recently occurred driven by developments at French business schools. Most notably, the ESSEC Chair in Philanthropy<sup>50</sup> was set up in 2011 at ESSEC Business School as a non-endowed position with philanthropic, alumni and corporate support. It is the first chair within a French higher education organisation dedicated to the study of philanthropy. Since 2012, it has offered a postgraduate course on philanthropy called 'Philanthropy: strategy and impact', with a total of 30 teaching hours. The course, which uses a mix of lectures, group work, case studies, meetings with professionals and field visits, is open to all ESSEC students as part of the Masters in Management.

ESCP Europe Business School offers a '*Philanthropy and Social Entrepreneurship*' course with an emphasis on social business and management. HEC School of Management offers a course on '*Philanthropy Management*' focused on the operations of philanthropic organisations. Outside the business school context, Sciences Po offers two postgraduate courses. The first, '*New Philanthropy, Public Policy and Development*' is part of a Masters in International Public Management at the School of International Affairs. As such, it offers a broad overview of the philanthropy field, with a particular focus on public policy and global philanthropy. The second course at Sciences Po, '*New Philanthropy and Social Investing*', is part of the Masters in Economics and Business in the Department of Economics and combines the broader overview with a focus on issues of social entrepreneurship, impact and innovation.

France could prove an exciting site of philanthropy education as it exhibits and reinforces some evidence of a rediscovery of philanthropy.<sup>51</sup> In 2014, Sciences Po, HEC and ECSP joined forces with the Tocqueville Foundation<sup>52</sup> to diffuse a modular philanthropy curriculum through a network of Masters-level courses. This partnership, alongside developments at ESSEC, creates a potential framework within which French higher education institutions more generally could build and shape philanthropy education and practice in the years ahead. However, the extent and pace of these developments are uncertain and still reliant on a small pool of enthusiasts both within and beyond the academy.

### Lithuania and the Baltic states

LCC International University in Klaipeda, Lithuania, is the home to the only concentration of philanthropy education in Baltic and Eastern European countries. LCC offers an undergraduate course on civil society and philanthropy, professional philanthropy training and a new Institute for Philanthropy<sup>53</sup> that opened in late 2013. While the new institute has yet to determine its disciplinary setting within the university,

<sup>50</sup> <http://chair-philanthropy.essec.edu/home>

<sup>51</sup> Gautier A, Pache A C (2014) *La philanthropie: une affaire de familles* Paris: Autrement

<sup>52</sup> <http://www.tocquevillefoundation.org/>

<sup>53</sup> <http://www.lcc.lt/institute-for-philanthropy>

significant research, teaching, training and consultancy is planned. According to its director, Dr Julianna Kokšarova, philanthropy education at LCC ‘demonstrates the value and practicalities of individual giving, organised philanthropy, corporate social responsibility, and corporate philanthropy as contributors to the common good . . . and immerses students into the realities of the civil society sector supported by philanthropic action’.

The existence of philanthropy education in LCC International University appears to result from a combination of historical and political circumstances and specific organisational and personal factors. On the one hand, it can be understood in the context of philanthropy’s role in rebuilding civil society and public trust in Baltic and Eastern European countries. On the other, its specific emergence at LCC is a result of several unique characteristics. First, LCC’s philanthropy provision is animated by Christian and humanitarian ideas of philanthropy, especially the idea of God as the creator of the universe and original philanthropist. Second, the university is strongly influenced by US philanthropy, and particularly the idea of private philanthropic funding as an institutional revenue stream. It is also notable that the Institute for Philanthropy’s founder gained her PhD at Indiana University’s School of Philanthropy, underscoring the impact of academic exchange and international knowledge sharing.

However, the case of LCC remains the exception in Lithuania. It is more common to discover topics on philanthropy embedded within other courses rather than a structured concentration on the subject. Kaunas University of Technology in Lithuania, for example, offers limited teaching about philanthropy in the context of the following courses and disciplines.

Institution	Course title	Discipline	Level
Kaunas Institute of Technology	Third Sector and Public Policy	Public Policy	MA
Kaunas Institute of Technology	Civic Participation and Public Policy	Public Policy	BA

Excluding the LCC developments, the pattern in Lithuania reflects the situation in other Baltic countries, and Eastern Europe more broadly. Whilst the post-Soviet opening of civil society has stimulated renewed interest in philanthropy, this has not yet converted into formal education on philanthropy. Estonia and Latvia have seen the emergence of philanthropically backed private and community foundations and a demand for training on non-profit management. According to Ieva Morica of the Soros Foundation in Latvia, ‘some charitable foundations occasionally lecture about issues related to philanthropy at workshops or conferences of NGOs or in conferences related to CSR issues’. The Soros Foundation also supported Latvia’s community foundations and international networking of non-profit and foundation practitioners. However, Morica cites a lack of expertise, a lack of demand and a small population of only 2 million as possible reasons for why this has not yet translated into university-level philanthropy education.

Elsewhere, indications of the emergence of philanthropy education in Central and Eastern Europe include the example of Masaryk University in the Czech Republic, where a review of research and teaching provision is underway, with a view to upgrading teaching on non-profits and philanthropy, as well as the Department of Civil Society Studies at Charles University in Prague.

## **Netherlands**

Netherlands has one of the largest non-profit sectors in the world relative to its population.<sup>54</sup> The country also boasts two dedicated philanthropy education centres, described separately below.

The Centre for Philanthropic Studies at VU University, Amsterdam is the most established philanthropy centre in Europe. Pioneered by Theo Schuyt, Professor of Philanthropic Studies, and now directed by Rene Bekkers, Professor of Prosocial Behaviour, it is a major hub of research and teaching on philanthropy with a particular focus on the study of giving motivations. Based in the Faculty of Social Sciences, the centre offers undergraduate modules, including an introduction to philanthropy, history of philanthropy and study of pro-social behaviours. It also offers more vocational postgraduate training geared at professionals working in the philanthropic sector and hopes to launch specific modules on philanthropy in master programmes from 2014 or 2015. In addition, the centre co-ordinates multiple research initiatives and hosts the European Research Network on Philanthropy<sup>55</sup> (ERNOP), which supports and facilitates cross-national collaboration.

The Erasmus Centre for Strategic Philanthropy (ECSP) was established in 2009 at Erasmus University, Rotterdam following a major donation from the Adessium Foundation, matched by the university. Based in the faculties of Management and Economics, the centre's research has recently focused on the management, strategy, governance and impact of foundations. Its research, teaching and consulting capacity aims to serve the needs of foundation practitioners as well as the academic community. Since 2013, ECSP has collaborated with both the European Foundation Centre and the Centre for Philanthropic Studies at VU University to provide training to foundation professionals and board members.

Windesheim University of Applied Sciences in Zwolle, Netherlands, has set up a full undergraduate course on fundraising, grantmaking and sponsorship, co-initiated by Theo Schuyt of VU University Amsterdam and consisting of two half-yearly courses.

The collaborations between VU and Erasmus on professional training and between VU and Windesheim on philanthropy courses, and the central role of ERNOP in building philanthropy infrastructure mean that the Netherlands is taking on a significant role as a centre of research, teaching and knowledge exchange on philanthropy and foundations in Europe.

## **UK**

The UK has the most extensive philanthropy education infrastructure in Europe. This includes dedicated academic centres at City University and the University of Kent, Masters degrees at City University and Northumbria University (and another planned at Kent) and academic course modules at City, Northumbria, Kent and, as of this year, St Andrews.

The relative strength of the UK can be attributed to its deeply rooted philanthropic traditions, a broadly favourable political environment and the strength of an existing academic Voluntary Sector Studies Network (VSSN).<sup>56</sup> In addition, over the last

<sup>54</sup> Salamon L et al (1999) *Global Civil Society: Dimensions of the Non-profit Sector* Johns Hopkins Center for Civil Society Studies

<sup>55</sup> <http://ernop.eu/>

<sup>56</sup> <http://www.vssn.org.uk>

decades, business schools have increasingly begun to address issues of individual and corporate responsibility, responsible business, social innovation and social entrepreneurship.<sup>57</sup> The increased importance of philanthropic funding to higher education in the UK may also contribute to the growth of philanthropy education, and this is explored further in Part 3. Notwithstanding these advantages, philanthropy education is still at an early stage of development. Research and teaching remains limited and often shaped by the initiatives of individual scholars and donors.

However there are some indications of an upsurge of provision. For example, the University of Kent is expanding its course modules on philanthropy, and hopes to introduce a new philanthropy masters in 2015. There is also strong current donor interest in creating a new School of Philanthropy at a London university, which could have a significant impact on the educational landscape in the UK and beyond.

<sup>57</sup> These efforts were encouraged by the Pears Business Schools Partnership, a four-year collaboration between Cranfield School of Management, London Business School, Said Business School and the Pears Foundation to promote individual responsibility in business and responsible business in society.

# Part 3 Deepening the picture: Interviews with philanthropy stakeholders

## 3.1 Overview

In-depth interviews were conducted with a sample of 18 philanthropy ‘stakeholders’, either in person or via Skype or telephone. The aim was to deepen the picture provided by the mapping and ascertain perceptions of the current context, state and future development of philanthropy education in Europe.

As the interviews aimed at gaining a breadth of perspectives in what is a relatively new area, they focused on a range of relevant stakeholder groups. The final sample consisted of foundation directors with considerable experience of university funding, umbrella bodies representing Higher Education, senior university fundraising staff and philanthropy advisors. In addition, insights from course instructors teaching about philanthropy and/or non-profits added a classroom-level perspective. The full list of interviewees can be found in the Appendix (5.2).

Semi-structured interviews focused on the following thematic areas:

- Philanthropy’s role in the funding of public goods, and the implications for Higher Education institutions.
- The rationales for and content of philanthropy education in Higher Education institutions: what should be taught and how?
- The barriers and opportunities to the development of philanthropy education, including the drivers of supply and demand.

The following paragraphs summarise the main findings under each of the themes.

## 3.2 How important is philanthropy in funding public goods?

### **Philanthropy has a growing role in public provision, including Higher Education**

Most interviewees believed that philanthropy had assumed greater importance in recent years due to government spending cuts and growing private wealth. Several commented that its importance to society would only increase as state funding reduces further. However some cautioned that the growth of philanthropy in Europe was not uniform or inevitable; significant differences would continue to exist within and between countries and sectors.

Several respondents noted variations in the stages of development of philanthropy, and philanthropy education in Europe. Even in countries where policy and practice around philanthropy was less developed, there were signs of its emergence. In Lithuania, for example, the increased presence of philanthropy on the governmental agenda was cited as an indication of growing interest.

Against this backdrop, interviewees were asked for their perceptions of the importance of philanthropic funding to Higher Education. There was general agreement that philanthropy had an important role.

One respondent emphasised Higher Education's status as a 'building block of society', which made it particularly worthy of philanthropic investment. This respondent also noted that philanthropy's role in funding Higher Education was neither new nor unprecedented, pointing to the impact of local philanthropy on the development of provincial English universities in the 19th century.

Several respondents commented that the current context of government spending cuts meant that philanthropy would assume greater importance as an additional funding stream, alongside state funding and fees. One respondent highlighted philanthropy's 'bigger profile across our university' and another its 'vital role for all sorts of university activity'. The importance of philanthropic funding appeared to be increasingly recognised by university leaderships. As one put it: 'In the UK, Vice Chancellors and Higher Education leaderships are investing in philanthropy.'

Whilst there was general agreement about the growing importance of philanthropic funding to Higher Education in Europe, the need to avoid generalisation was also noted.

First, several respondents highlighted variations between countries and pointed to the relative strength of the UK. As one put it: 'Elsewhere in Europe, the picture is more mixed: there is generally less fundraising infrastructure and no match funding incentives.'<sup>58</sup> Another observed that 'European business schools are generally more comfortable with private funding than state universities'. It was also observed that a process of marketisation was 'forcing Higher Education Institutions to rethink what they do and how they do it'.

### **Philanthropy's importance to society increases the need for universities to build a knowledge base about philanthropy**

The growing visibility and prominence of philanthropy, together with its increasing role in providing or funding public goods, justified greater scholarly attention according to many respondents. As one foundation representative put it: 'Universities have a fundamental role in shining an analytical light on every area of society.' This light may become increasingly important in making sense of philanthropy as, in the words of another respondent: 'Philanthropy's role will only increase as state funding reduces.'

### **The appetite for increasing the knowledge base is variable**

There was general recognition of the need to advance scholarship in this area, but those who actually taught about philanthropy were most emphatic about this need. As one put it: 'Universities should provide the knowledge base and research methods to understand philanthropy.'

Whilst many course instructors emphasised the importance of inter-disciplinary scholarship and teaching, there was also awareness of the responsibility to contribute to the development of professional skills and qualifications. One interviewee suggested that: 'A critical contribution of scholars is to professionalise the non-profit sector and improve practice in areas such as management, fundraising and governance.'

<sup>58</sup> This observation refers to a £200 million UK government match-funding scheme that ran between 2008 and 2011. <http://www.hefce.ac.uk/whatwedo/invest/funds/volgiving/>

The academic and practical purposes of studying philanthropy were summed up by one course instructor who commented that 'philanthropy is intrinsically interesting but knowledge about it also has vocational and employability benefits'.

Interestingly, foundation informants also showed a genuine awareness of the need for broad-based research about philanthropy. As one put it: 'Philanthropy is a legitimate and important subject of study and needs to be underpinned by academic questions, research methods and theoretical models.'

At the same time, foundation respondents also acknowledged the instrumental roles that philanthropy education might serve. These included philanthropy skills such as grantmaking techniques, impact evaluation and foundation governance as well as the capabilities of philanthropy in areas of substantive interest to a foundation.

One foundation representative suggested that whilst the broader study of philanthropy was essential, the professionalisation of the philanthropy sector may place a premium on practical skills that could be offered in postgraduate courses or training. The importance of a practical orientation to philanthropy education was further emphasised by a philanthropy advisor who argued that private funders should demand that universities offer more practitioner-led study and teaching.

University representatives were more lukewarm about the role of universities in generating scholarship and teaching about philanthropy. As one put it 'It is an interesting idea and proposition but not something I had previously thought about. I need to make a leap to this.' Another interviewee acknowledged that 'universities have a role in philanthropy education' but pointed out that 'teaching is embryonic, and philanthropy is often confused with fundraising'.

These comments suggest that senior university administrators and development staff were more attuned to the instrumental role of philanthropy as a source of funds and less engaged with philanthropy as a subject of scholarship.

In turn, this raised the question of the fundamental rationale for increased academic attention on philanthropy. Should it be studied because of its increasing role in society, including universities, or more narrowly because of its significance to university budgets?

One foundation respondent argued that the study of philanthropy should be conceived on academic grounds alone and not whether or not universities raise, or are interested in raising, philanthropic funds. As he put it: 'It does not follow that there should be an academic specialism in philanthropy just because philanthropic funding is important to universities. For example, universities might benefit from marketing or communications but that doesn't mean that they should specialise in those areas.'

A development officer offered a more pragmatic suggestion that hinted at the potential benefits to universities of engagement in this area: 'If philanthropy is instrumental to a university there are instrumental reasons to invest resources in understanding the phenomenon.'

### 3.3 What should be taught about philanthropy?

This section looked in more detail within the content of philanthropy education. First, respondents were asked about the appropriate disciplinary setting for the study of philanthropy. Second, interviewees were asked specifically for their views about 'student philanthropy', an approach to teaching about philanthropy that is increasingly common in US universities, in which students are given the opportunity to participate in real grantmaking and fund allocation.

#### **Multi-disciplinary study of philanthropy should be encouraged**

There were strong views and, in some cases, divisions amongst respondents about the appropriate disciplinary settings for the study of philanthropy. These views fell into three categories.

The first and largest category consisted of those who emphasised a flexible, multi-disciplinary study including a range of disciplines, methods and approaches. Here, the value of 'studies of philanthropy across boundaries' such as history, psychology, anthropology and political theory were emphasised. 'The most interesting aspects will be . . . studying philanthropy as a domain within different disciplines bringing different perspectives and insights' argued one respondent.

A second group emphasised business and management disciplines. This group noted the importance of, and need for, vocational skills provided through postgraduate and training provision. Whilst acknowledging that philanthropy education is 'not just a management proposition to train people to run foundations', the same informant added that 'at the same time, universities can play an important role in professionalising the sector'. Others put the point more forcefully. As one put it: 'The skills to be a good funder are very linked to business school skills and commercial skills: risk management, operations management and performance management.'

A third group emphasised larger questions about the role of philanthropy and foundations, and identified public policy and other social science disciplines as the most appropriate arenas of study: 'A public policy stream could look at issues of legitimacy, power and law in philanthropy' argued one whilst another commented that 'there is a need to address public policy issues relating to philanthropy, and to improve the legal environment for philanthropy'.

A number of interviewees acknowledged that they had not thought in detail about the question of the appropriate disciplines for the study of philanthropy. This was especially true amongst those who had conceived of philanthropy's primary function being in terms of the fundraising imperatives noted above.

#### **Ambivalence towards vocational imperatives**

Unsurprisingly, those respondents who emphasised the centrality of business disciplines also tended to highlight vocational needs, especially building the skills of foundation and fundraising practitioners. This more vocationally oriented motive was reflected in the following comments:

'Business schools help foundations address management questions and practical challenges such as problem-solving, theory of change, evaluation and monitoring.'

‘More philanthropy education could help meet sector demands for an increase in the number and quality of trained Higher Education fundraisers . . . it will also raise the profile of both philanthropy and fundraising as professions.’

Another put the point more negatively: ‘Humanities departments are taken less seriously when they are not connected to management imperatives of universities and by the outside world which places a premium on practical utility.’

This view was not universally shared and was accompanied by concerns about narrowing the scope of study and teaching about philanthropy. One respondent summed up these concerns as follows: ‘Universities have a role in vocational training alongside the foundation sector. But it is important to avoid the danger of looking only through the prism of the third sector and not understanding the phenomenon more broadly. There is a danger of becoming too narrow and too managerially focused.’

One emphasised the distinction between undergraduate programmes embedded within the university and thus offering a broader introduction and post-graduate courses which could focus more on the needs of people within the philanthropic sector. The issue of skills is discussed in more detail below.

### **Appetite for student philanthropy in Europe but scepticism about its fundability**

In this section, interviewees were asked about a particular US approach to teaching philanthropy called ‘student philanthropy’, in which students were invited to distribute between \$10,000 and \$100,000 in real funds to beneficiaries. Respondents’ views were sought because student philanthropy has become a major part of the philanthropy education landscape in the US, backed by universities and foundations alike. The level of interest among philanthropy stakeholders was considered to be a useful initial gauge of its potential application in European settings.

Almost all respondents perceived student philanthropy as a welcome development and identified several benefits including: learning grantmaking skills, addressing social needs, raising the visibility of philanthropy and enhancing student motivation. Typical comments included: ‘experiential philanthropy skills would be very useful for non-profit employers’ and ‘student philanthropy could offer an interesting opportunity for students to learn about the two sides of the philanthropic transaction’.

Course instructors also noted the pedagogical benefits. As one put it: ‘Student philanthropy would be great as a variant of “giving circles”.<sup>59</sup> It could add pedagogical value by making studies feel relevant to students and thus enhance motivation.’

The perception of student philanthropy’s role in raising the profile of philanthropy in countries with more limited philanthropic traditions was highlighted by the following comments from Lithuania, Sweden and France:

‘Student philanthropy would be very interesting both for learning and to raise the profile of philanthropy in Lithuania.’

‘Student philanthropy . . . could help change public perceptions of philanthropy in Sweden.’

<sup>59</sup> Groups of existing and potential donors who meet, often informally, to discuss giving: a particularly popular development in the US.

'I would love to see student philanthropy happen in Europe. It could change students' lives and opens people's minds and raise consciousness about philanthropy and civil society in France.'

Student philanthropy's potential role in raising awareness about philanthropy may make it a particularly attractive proposition to advocates of philanthropy, especially in countries where philanthropy has more negative associations.

Alongside this enthusiasm, there was considerable scepticism about how and whether programmes of student philanthropy would be fundable. Different cultural and environmental factors in Europe compared to the US were identified as a major barrier. One respondent expressed outright disbelief that universities and philanthropists would fund such programmes, stating: 'I can't see it happening in my lifetime.'

This pessimism prompted comments about more affordable alternatives to fully-fledged student philanthropy, such as co-teaching with practitioners, the use of guest lecturers and student placements at foundations.

### 3.4 What are the barriers and opportunities for philanthropy education?

This section explored perceptions of the barriers to the development of philanthropy education and some of the opportunities for growth including drivers of supply and demand.

#### **University leaderships have not prioritised philanthropy research or education to date**

As noted above, there was a near-unanimous view that philanthropy was increasingly important to the provision of public goods including universities, and that universities have a responsibility to provide a knowledge base about philanthropy. However, many respondents felt that university leaderships have neither embraced nor prioritised the challenge of increasing provision in this area. As one foundation head put it: 'universities have not seen philanthropy as an area worthy of serious study' and noted that no university leader had ever asked his foundation to support research on philanthropy during his tenure.

The overriding interest in philanthropy was as a source of money rather than a subject of enquiry. Thus, it was pointed out that the prevailing role of philanthropy in Higher Education was primarily instrumental rather than intellectual, reflecting an interest in fundraising rather than philanthropy per se. As one put it: 'Philanthropy has only recently re-emerged on the radar of universities but that's driven by a focus on raising funds *from* philanthropy.'

One respondent insightfully suggested that the way to square this circle was to recognise and exploit the linkages between fundraising and philanthropy, noting that: 'Universities haven't made the link between the expansion of development and fundraising and the expansion of philanthropy. The former creates the need for more research and teaching about the latter.'

These responses indicate that universities, whilst desirous of philanthropic funds, remain to be convinced of the need to invest in philanthropy education relative to other areas of research. As one acknowledged, 'it is a bit of a leap for leaderships to see its value'.

### **Scholarship about philanthropy is not internally embedded or valued**

Respondents identified several major barriers related to a lack of embeddedness of philanthropy as a subject of study within universities. These included a lack of recognition, weak financial incentives for undergraduate courses, uncertain student demand, an absence of ranked journals, no clear disciplinary rooting and government cuts impeding innovation.

A lack of recognition of philanthropy's importance was, according to one respondent, particularly unfortunate given that 'many students will go on to work in non-profits'.

The lack of financial incentives to offer courses on philanthropy and the increasingly 'impact-driven' focus of some universities were cited as factors inhibiting greater supply. One respondent suggested that postgraduate courses focused on participants from the philanthropic sector may be more cost-effective as they are fee-based, whereas philanthropy courses at undergraduate level are embedded in the university through open fixed credits. In Germany, for example, the principle of 'consecutive funding' at state level was seen as posing an additional challenge. Philanthropy was most likely to be situated at Masters level but these programmes are not likely to be funded without BA programmes that exist within prescribed disciplines.

Several respondents pointed to uncertainties about levels of student demand for philanthropy education. One noted that courses on social entrepreneurship at business schools have more appeal than those on philanthropy and highlighted the need for stronger marketing and incentives to build student demand. Other respondents argued that student demand is growing but that this needs to be articulated more clearly to university leaderships. In countries with more limited philanthropic tradition or visibility, it was pointed out that the lack of courses was linked to a general lack of understanding of philanthropy.

Respondents also suggested that philanthropy's amorphous and inter-disciplinary nature made it hard to embed within the academy. At the same time, in instances where it is being studied, it is within courses that predominantly focus on non-profit management. The absence of university-approved ranked journals was also identified as having a cooling effect on academic teaching and research on philanthropy.

Several respondents noted that government cuts to university funding made it harder for new areas of study to emerge and find funding. One pointed to a major proposal to build philanthropy studies across Europe that was dropped by the European Union due to budgetary retrenchment. Another respondent noted that the UK government was more interested in promoting giving and volunteering than funding research and teaching on the subject.

### **Philanthropic funders have, to date, shown a limited appetite to support philanthropy research**

Several respondents remarked on the negative attitude of donors, philanthropists and foundations to funding philanthropy education. Several factors were identified, including a greater foundation appetite for action than introspection, the high, upfront and 'upstream' nature of the investment in research, and potential conflicts of interest.

The greater emphasis on action was emphasised by one respondent as follows: 'Philanthropists are more interested in practice than theory. They are more action-oriented and don't have much appetite for navel-gazing . . . funders are more

interested in substantive areas than their own processes. The lack of funder interest limits private funding for philanthropy education.'

Others highlighted issues of cost and leadership: 'An academic chair in philanthropy is a very expensive intervention for funders' whilst also noting that 'philanthropy is not providing enough money or leadership to research itself'.

Finally, one respondent noted that it was not necessarily attractive for philanthropy to fund research into itself. This could be because it is not within the remit of the foundation or, more controversially, 'some of the research questions themselves might be uncomfortable for philanthropy, especially those around power and legitimacy'.

These remarks point to a potential conflict of interest in philanthropic funding of research and teaching about philanthropy. It was noted that there is a risk that foundation-funded provision could influence the direction of academic enquiry and push the research agenda on philanthropy towards non-controversial issues and prevent a more critical examination of philanthropy. As one informant put it: 'You wouldn't go to a tobacco company for funding of cancer research. Funding for research and teaching about philanthropy would be better to come from statutory research bodies than private funders.'

### **Opportunities**

The prevailing uncertainty about the future of philanthropy education was embodied by one respondent who commented that 'it's difficult to say what will happen in the next 5–10 years. It's hard to know demand until it exists.'

Yet, whilst the lack of appetite to date amongst universities and donors point to major barriers, respondents also identified several opportunities and expressed optimism about the future prospects of philanthropy education in Europe. This optimism reflected a perception amongst donors, university leaderships and academics, that there were several changes on the horizon that could impact the growth of the field.

### **Philanthropists and philanthropic foundations are showing a growing interest in philanthropy research**

These signs of renewed interest were most marked amongst philanthropists and foundations. It was suggested that professionalisation was stimulating greater interest in philanthropy research and creating the potential for private-public funding of philanthropy research, especially in areas of funders' interest. Moreover, it was felt by some that foundations might provide leadership in this area and 'push' universities into increasing provision.

The general optimism was reflected in the following comments from foundation representatives and philanthropy advisors:

'The time is ripe for joint public-private funding of philanthropy research.'

'We are pushing an open door. There is much more institutional interest and receptiveness amongst universities than in 2008.'

'It would be good to see a university-based cross-disciplinary institute for philanthropy. Funders could potentially support some of the infrastructure.'

Or this comment from a major philanthropic donor to universities: 'I definitely think that universities should offer more research and teaching about philanthropy as it instils a

sense of values and community. It is something that is meaningful for the entire life of the student.’

The opportunity to tailor educational provision to the interests of funders was also identified. For example, human rights funders might be willing to support a ‘Centre on Human Rights Philanthropy’ more than a generic ‘Centre on Philanthropy’. This suggestion reflects a growing trend within foundations to build capacity in their own spheres of interest.

The need and opportunity to improve philanthropic practice was also cited as a potential driver of greater interest in philanthropy research. As noted above, the interest here would be more vocational in its focus.

The key role of philanthropists and foundations in stimulating a philanthropic research agenda was emphasised by several respondents. One said that ‘leadership will not come from universities, action has to come from within the philanthropy sector itself’.

Interestingly, this view was endorsed by university respondents, one of whom put it as follows: ‘Peer-to-peer demand from philanthropists is the key to placing it on the agenda and making the case for mainstreaming philanthropy education.’

### **There are major opportunities for universities in the realm of philanthropy education**

Respondents also identified major opportunities and benefits for universities, ranging from building trust with donors to developing skills of fundraisers and advancing academic scholarship on philanthropy in response to growing societal interest.

One respondent suggested that its university’s philanthropy specialism helped to ‘open doors’, while another commented that ‘it would add to our credibility when talking to donors to be able to point to a programme on philanthropy’. One academic added that ‘universities may start showing an interest when they see how courses in philanthropy help attract funds from donors and boost their reputation’.

The second area of direct practical relevance to universities was the opportunity to build the skills, capabilities and qualifications of development staff. This was identified as a key issue in the Pearce report<sup>60</sup> on Higher Education funding. Here it was suggested that philanthropy education, especially when provided in a business school setting, could help meet the sector’s needs for increases in the number and quality of trained fundraisers: ‘Philanthropy education might help build a field and create development opportunities for fundraising staff, helping both professionalisation and employment.’

Finally, and most importantly for scholars, the growing presence of research and teaching on philanthropy across Europe creates the opportunities dramatically to expand the knowledge base about philanthropy at European universities. The existence of several philanthropically backed dedicated academic centres and research networks creates the conditions for fostering complementary cutting-edge research. The Dutch context is exemplary, with VU University focused on giving motivation and Erasmus University on endowed foundations, while sharing training provision. It was also noted that the new chairs and centres of philanthropy bring greater research capacity and new cohorts of students who will assume roles in universities, foundations and non-profits in years to come, further strengthening the field.

<sup>60</sup> HEFCE and More Partnership, (2012), *Review of Philanthropy in UK Higher Education*

# Part 4 Key findings and critical reflections

The aim of this study was to illuminate the scale and scope of philanthropy education in Europe today (Part 2) and highlight some of the key issues affecting the future development of the field drawing on the perspectives of a diverse group of informed stakeholders (Part 3).

The findings are summarised here, together with some critical reflections on the future direction of philanthropy education and suggestions for further research.

## 4.1 Key findings

### Mapping

There is an embryonic philanthropy education sector emerging across Europe. This can be seen in a range of geographies and universities, within academic disciplines and centres, and in (primarily) postgraduate teaching on the subject.

#### *1 Geographic spread*

Philanthropy education exists across Europe but is stronger in some regions and countries than others. Concentrations were most evident in Western European countries, especially the UK, Netherlands, Germany, Italy and France. Conversely, philanthropy education was virtually absent in Northern Europe and in countries of the former Soviet Union, with the exception of Lithuania.

#### *2 Disciplinary spread*

Philanthropy education is dispersed across a number of disciplines in the social sciences and the arts and humanities. Business is the predominant discipline within which philanthropy is taught.

#### *3 Educational level*

Teaching about philanthropy primarily takes place at postgraduate level in the form of individual elective courses and in the context of executive education.

#### *4 Dedicated academic centres*

The emergence of academic centres and chairs in philanthropy reflects a small but growing critical mass of philanthropy education in Europe.

### Interviews

Interviews were conducted with informed stakeholders including foundation directors, university leaders and development staff and philanthropy course instructors. Some of the insights yielded were:

### **On the importance of philanthropy:**

- Philanthropy has a growing role in public provision, including Higher Education.
- Philanthropy's importance to society increases the need for universities to build a knowledge base about philanthropy.
- Philanthropy course instructors and foundations show an appetite for more systematic teaching and research about philanthropy.

### **On what should be taught about philanthropy:**

- Teaching about philanthropy should draw on expertise from multiple disciplines.
- The imperative to provide vocational training for the philanthropy and non-profit sector was urged by some whilst others emphasised the need for a broader approach centred on the history, philosophy and ethics of philanthropy.
- 'Student philanthropy' courses would be welcomed in Europe as an innovative approach to teaching, but there is scepticism about their fundability.

### **On barriers and opportunities for philanthropy education**

- University leaderships have not prioritised philanthropy research or education to date.
- Scholarship about philanthropy is not internally embedded or sufficiently valued in the academy. It lacks academic and financial incentives and disciplinary rooting and student demand is unproven.
- Philanthropists and foundations have traditionally shown a limited interest in supporting philanthropy research, which some perceive as navel-gazing or potentially raising awkward questions.
- Philanthropic funders are showing a growing interest in philanthropy research reflecting greater professionalisation, introspection and scrutiny, but foundation funding in this area could create conflicts of interest.
- Philanthropy education presents multiple opportunities for universities both at the institutional level – in terms of building donor relationships, understanding donor motivations, and developing the skills of fundraisers – as well as at the scholarly level in terms of advancing academic knowledge.

## **4.2 Critical reflections**

### **How strong is the case for teaching about philanthropy within Higher Education?**

In his book on the European philanthropy sector, Theo Schuyt argues that philanthropy is still 'on the sidelines' of academia.<sup>61</sup> Schuyt notes several possible explanations, including the dominance of practitioner-oriented research over theoretical knowledge, the lack of a disciplinary setting for philanthropy, the relative newness of the subject, a

<sup>61</sup> Schuyt T (2013) *Philanthropy and the Philanthropy Sector: An Introduction* Ashgate

perception that it is 'not considered acceptable to investigate philanthropy critically . . .' and a 'natural aversion' to examining giving.<sup>62</sup>

The results of this research provide some evidence in support of these claims, though it was beyond the scope of the project to evaluate them systematically. The research also reinforces Schuyt's conviction that change may be underway. Two indicators highlighted by Schuyt are the upgrading of philanthropy to the status of a 'financial instrument' by the European Commission in 2011, and the emergence of a 'societal substructure' arousing interest in the social phenomenon of philanthropy. This interest creates a powerful social rationale for the study of philanthropy and justifies greater engagement both at academic and leadership levels of Higher Education institutions.

### **On the academic level, what areas of study and teaching could and should be introduced?**

At present, there is no consensus amongst scholars about what should be studied, nor the most appropriate disciplinary settings. As we have seen, current provision is distributed across a variety of disciplines, most frequently appearing in business-related fields. As the field expands, the locations for the study of philanthropy will become a vital consideration as it will shape the type and content of knowledge about philanthropy that is produced and disseminated.

What is clear is that the potential questions to ask about philanthropy are vast and encompass a broad range of disciplinary and sub-disciplinary perspectives across the liberal arts and humanities as well as the social sciences. They involve theories of civil society, philanthropy and the non-profit sector, issues of ethics, power and re-distribution, ideas of egotism, altruism and generosity and the nature of private visions of the common good across time and place. They also include theories of organisations and ideas derived from behavioural economics which provide insights into how giving responds to appeals, incentives and conditions.

Addressing these and other questions would not only advance academic knowledge but also contribute to policy-making. The role of political philosophy in informing major questions of public policy in the philanthropic sphere is a case in point. A better understanding of the tensions between philanthropy and justice would contribute to the development of appropriate frameworks and regulatory structures for philanthropic activity.<sup>63</sup>

### **How might changes to Higher Education funding impact university-based philanthropy education?**

On the institutional level, the interface between Higher Education and philanthropy has narrowed in recent years, particularly at British universities and continental European business schools. Many university leaders have welcomed this narrowing and some have actively participated in efforts to increase philanthropic income by growing the Higher Education fundraising sector.<sup>64</sup> However, this growth has not been

<sup>62</sup> *ibid.*

<sup>63</sup> Kymlicka W, 'Altruism in Philosophical and Ethical Traditions: Two Views' in Phillips S, Chapman B and Stevens D (Eds), (2001) *Between State and Market: Essays on Charities Law and Policy in Canada*

<sup>64</sup> Department for Education and Skills (2004) *Task Force on Voluntary Giving to Higher Education* and HEFCE and More Partnership (2012) *Review of Philanthropy in UK Higher Education*

without controversy and, in some cases, has led to scrutiny over the acceptance and management of philanthropic contributions.<sup>65</sup>

As philanthropic funding becomes an even more critical income stream alongside state funding and fees, it is likely that universities of various types and sizes across Europe will increasingly invest in all aspects of Higher Education fundraising. In England, the Higher Education Funding Council England (HEFCE) has set ambitious targets for growth in philanthropic income and anticipates substantial increases in the size and quality of the university fundraising sector to meet those targets.<sup>66</sup> These aspirations are likely to result in university leaderships showing a greater willingness to invest in research and teaching about philanthropy for several reasons. First, university-based courses and training provide opportunities to enhance the skills and capabilities of fundraisers. Some universities offer courses and training on fundraising in partnership with boutique consultancies and umbrella bodies. It is conceivable that broader engagement with philanthropy will become a part of this provision. Second, universities seeking to build relationships and trust with donors may discover that university-based research centres and academic expertise on philanthropy are appealing to philanthropists and foundations with an interest in philanthropy itself or in the potential roles of philanthropic giving in a substantive subject area related to their interests. Third, and most intriguingly, the need to improve fundraising practice may stimulate greater academic research on donor behaviour, particularly in social science fields such as behavioural economics. In her foreword to the 2014 HEFCE report, Professor Shirley Pearce hints at some of these possibilities: 'Universities that have an interest in philanthropy might consider offering postgraduate qualifications and helping to develop the body of research that will inform the further evolution of the profession and our understanding of what makes effective fundraising practice.'<sup>67</sup>

However, it is important to guard against generalisation. While some of the observations may be applicable to continental Europe, this analysis is mostly focused on the UK: it is not inevitable that other European countries will follow the British trajectory towards a US model of funding of Higher Education. Investment in philanthropy research and teaching is likely to vary between countries and institutions.

### **What dangers lie ahead for the growth of philanthropy education?**

As we have seen, there are strong academic and institutional rationales for investment in university-based philanthropy education. However, neither is value-free propositions: academic interests vary across disciplines while institutional imperatives may push the content of research and teaching towards meeting the needs of practitioners. The knowledge that is ultimately produced is likely to be influenced by internal factors related to the interests of individual scholars and external factors related to public and societal concerns, mediated by research bodies and private funders as well as the non-profit and philanthropy sectors.

At this early stage in the development of philanthropy education, it is timely to note several dangers, which became visible during the course of this study.

The first danger is the instrumentalisation of the field which could place an excessive premium on knowledge geared towards fundraising or grantmaking practitioners.

<sup>65</sup> See for example the Woolf Inquiry (2011) *An Inquiry into the LSE's Links with Libya and Lessons to be Learned Council of the LSE*

<sup>66</sup> HEFCE (2014) *'An emerging profession: the higher education philanthropy workforce'*

<sup>67</sup> *Ibid.*

Whilst some would welcome this shift, a focus on vocational and professional ends could narrow the scope of philanthropy education. The question of how to respond to the growing needs and demands of practitioners without instrumentalising the study of philanthropy is a major unresolved tension, reflected in some of the interviews conducted for this study. It would be regrettable if the imperative to improve capacity and professionalise the philanthropic and non-profit sectors came at the expense of a broader research and teaching agenda about philanthropy.

The growing conflation of philanthropy and fundraising is a second danger. It is reflected in the re-naming of fundraising departments as philanthropy departments in some Higher Educational institutions, as well as in the title of the 2014 HEFCE report, which refers to the higher education *philanthropy* workforce rather than the higher education *fundraising* workforce. On one level, these linguistic choices simply reflect the inter-relation and coalescence of fundraising and philanthropy, and the fact that philanthropic resources are the primary target of fundraisers. But on another level the conceptual slippage elides the differences between the two concepts. The focus on philanthropy as a source of funds, whilst understandable from a fundraising perspective, risks missing some of philanthropy's most defining features, as the expression of private visions of the public good.

As philanthropy education grows, the risk of conflicts of interest in the funding of research and teaching on philanthropy should not be underestimated. The first risk is that philanthropists invest in this area in order to encourage more philanthropy. Such a 'promotional' agenda could push philanthropic funding towards disciplinary settings and scholars who are broadly supportive of philanthropy and away from the disciplines and scholars asking more critical questions. This is a particular risk in relation to 'student philanthropy', which is most reliant on external support and in which donors often explicitly state their motivations in terms of fostering civic participation.

The second risk is that universities may find themselves conflicted between, on the one hand, welcoming philanthropists and seeking philanthropic funds for a range of causes and, on the other, supporting rigorous academic scholarship about philanthropy including that of their own donors, which might be highly critical. As philanthropic income grows, this could act as a deterrent to critical scholarship. For example, how would a university respond to a programme of research, say in political science, in which scholars addressed questions of the relationship between philanthropy and inequality, the tensions between grantmaking and investment practices or the use of philanthropy to improve reputations? As universities become increasingly keen to cultivate donors and emphasise their appreciation of philanthropy, they may become more sensitive to their own faculties asking critical questions of philanthropists who support them, as part of general philanthropic scholarship. These challenges were underscored in May 2014, when UCLA returned a major gift made by businessman and philanthropist Donald Sterling following well-publicised racist comments.<sup>68</sup>

### **Whither philanthropy education? Possible directions**

At the heart of the debate about the future of philanthropy in Higher Education institutions is a tension between reflective and instrumental rationales. Instrumental rationales push philanthropy into the service of practitioners, not least fundraising practitioners seeking to raise funds for their own institutions. This necessitates professional skills and tools. Reflective rationales are more focused on generating

<sup>68</sup> <http://newsroom.ucla.edu/releases/ucla-rejects-donald-sterling-gift>

academic knowledge to produce a deeper understanding of philanthropy without a specific extrinsic goal.

These debates mirror earlier tensions in the field of non-profit management education about the 'best place' to study the subject.<sup>69</sup> Roseanne Mirabella and Giuliana Gemelli concluded that the focus within non-profit management education on the 'internal management' of non-profits reflected a drive toward the professionalisation of the non-profit sector in the last two decades.<sup>70</sup>

To what extent is there a comparable drive towards professionalisation in the philanthropy sphere? The evidence presented in Part 2 suggests that the largest number of philanthropy courses is located in business and management disciplines, as well as at postgraduate level. This twin emphasis on business disciplines and postgraduate education indicates a vocational dimension to current teaching provision, which is also reflected in the sizeable number of professional training courses on the subject.

The strong vocational current that appears to run through much contemporary provision reflects demand from fundraising organisations, including universities, seeking to expand its workforce and increase skills and capabilities. Alongside that, foundations are professionalising their grantmaking practice. These developments create incentives to provide vocationally oriented provision in the coming years. It is possible that this provision will exist alongside more academic endeavours. However it is also possible that the demands of practitioners could push research and teaching in more narrow and instrumental directions.

Yet the growing social interest in philanthropy suggests that there is also a need to cultivate a broader-based research and teaching agenda about philanthropy. Such an agenda would situate the study of philanthropy within a multiplicity of disciplines and frameworks and help build a robust and independent body of knowledge which may generate insights for practitioners in years to come. As several interview respondents pointed out, it is important that an exploration of theoretical questions complements the professionalisation of the philanthropic and non-profit sectors. This task may be challenging and is likely to require a degree of vision and commitment on the part of universities and philanthropies alike. It will also require vigilance about conflicts of interest noted above.

Whatever one's view of the 'best place' or places to study philanthropy, a closer analysis of the aims, content and structure of existing curricula, and a comparison of these curricula across disciplinary settings, could generate further insights about current and future provision.

The potential role for experiential philanthropy education, and in particular student philanthropy, also presents intriguing possibilities. Student philanthropy initiatives can serve as a bridge between theoretical ideas and practical challenges embodied in philanthropy. On the one hand, student philanthropy provides practical training for foundation and non-profit work through its emphasis on grantmaking skills, and direct engagement with social issues. On the other, the academic study of philanthropy helps students reflect critically and carefully on their grantmaking experience, leading them to make better decisions, or in some cases to question the decisions they make.

<sup>69</sup> Mirabella R, Wish N (2000) 'The Best Place Debate: A Comparison of Graduate Education Programs for Non-profit Managers' *Public Administration Review* (2000) 60: 3

<sup>70</sup> Mirabella R, Gemelli G et al. (2007) 'Non Profit and Philanthropic Studies: an International Overview of the Field in Africa, Canada, Latin America, Asia, the Pacific and Europe' *Non Profit and Voluntary Sector Quarterly* 36:4

As we have seen, it has grown dramatically at US universities on the back of major philanthropic investment but whether, and the ways in which, student philanthropy might develop in a European context is unknown. Philanthropy courses in which students engage with historical and theoretical texts about philanthropy, and apply that knowledge to inform real grantmaking, may prove instructive.<sup>71</sup>

### 4.3 Suggested measures

A major challenge for philanthropy education will be to find the balance between academic and practitioner-focused content. This balance is likely to prove elusive and shaped by the settings in which educational provision is introduced.

As we have seen current provision is patchy and uneven. For those that see the development of a field of philanthropic studies in Europe as an effective route to develop a cohesive, wide-ranging and inspiring academic offering, several suggestions present themselves.

First, curricular guidelines for the teaching of philanthropy. In 2007, The Non-profit Academic Centres Council in the US published curricular guidelines for undergraduate study, which emphasised the need to balance 'liberal arts' and vocational content.<sup>72</sup> As philanthropy education in Europe builds up from a dispersed and fragmented base, a comparable set of curricular guidelines might be timely.

Second, a philanthropy course reader. Together with curricular guidelines, a high-quality reader could provide an orientation to students by grounding the study of philanthropy in texts and concepts drawing from a wide range of disciplines and fields.<sup>73</sup>

Third, the time may also be ripe for the establishment of a multi-disciplinary academic journal of philanthropy, which could both capitalise on, and galvanise, the critical mass of scholars in this area.<sup>74</sup> The *Foundation Review*, pioneered by the Johnson Center for Philanthropy at Grand Valley State University, could provide a model or partner in this endeavour.<sup>75</sup>

Finally, statutory research councils should give consideration to increasing their investments in deepening understanding of philanthropy. This would respond to growing social interest and, in some cases, concern about philanthropy's role in society. Funding from statutory sources and internal revenues would also be preferable to philanthropic funding of research and teaching on philanthropy, to avoid conflicts of interest noted above. Where this is not possible, the disclosure of funding agreements and background correspondence between donors, academics and fundraisers may mitigate real or perceived conflicts.

<sup>71</sup> For an account of the 'Theories of Civil Society, Philanthropy and the Non-profit sector' course at Stanford University, which this author co-taught, see <http://www.philanthropy-impact.org/article/stanford-philanthropy>

<sup>72</sup> Non-profit Academic Centres Council (2007) *Curricular Guidelines*

<sup>73</sup> The idea of a philanthropy course reader to advance philanthropy education has been long championed by Dr Beth Breeze, director of the Centre for Philanthropy, University of Kent.

<sup>74</sup> Under the joint leadership of Dr Tobias Jung and Professor Jenny Harrow at the Centre for Charitable Giving and Philanthropy (CGAP), and Professor Susan Phillips at Carleton University such a proposal has been submitted and successfully reviewed by publisher Routledge.

<sup>75</sup> <http://johnsoncenter.org/resources/foundation-review>

## 4.4 Conclusion

In 2009, David Carrington concluded his report on philanthropy education with a vision of a thriving 'ecosystem' of philanthropic thought and practice within five to seven years.<sup>76</sup> The findings of this study suggest that vision was optimistic because provision is still limited and variable across Europe.

More research is needed to give greater explanatory power to the descriptive analysis in this study. Further research could include a systematic exploration of the variable rates of growth of philanthropy education in Europe. Are these the result of macro political environments such as social democratic and post-communist structures? And are we now seeing a growing interaction and possible diffusion between existing centres of research and teaching? What types of university, and in which disciplines, does philanthropy become embedded? Can we understand why some academic centres fail and others succeed? And how do research and teaching intersect?

These and other questions are now timely.

This research suggests that considerable potential exists for the development of an inter-disciplinary field of philanthropy studies in Europe. The creation of new courses, chairs and centres on philanthropy, the increased involvement of philanthropy practitioners in academic settings and the interest of some foundations to create a 'philanthropy learning infrastructure' across Europe reflect this potential.<sup>77</sup> These mutually enriching efforts, and more besides, will be necessary if philanthropy education is to thrive and the much-discussed but still mercurial phenomenon is to be better understood.

<sup>76</sup> Carrington D (2009) *The Application of Learning and Research to the Practice of Philanthropy*

<sup>77</sup> Symonds J, Weisblatt K & Carrington D (2012) *Shedding Light on our Own Practice*, Alliance Publishing Trust

# Part 5 Appendices

## 5.1 Research informants

Country	Informant	Institution
<b>Austria</b>	Dr Florentine Maier	Vienna University of Business and Economics
<b>Belgium</b>	Dr Lisa Hehenberger Rosien Herweijer Dr Virginie Xhaufclair	European Venture Philanthropy Association European Foundation Centre University of Liege, HEC Management School
<b>Czech Republic</b>	Dr Miroslav Pospisil	Masaryk University, Brno
<b>Estonia</b>	Mall Hellam & Katrin Enno	Open Estonia Foundation
<b>Finland</b>	Dr Anne Birgitta Pessi & Prof Heikki Hiilamo	University of Helsinki
<b>France</b>	Arthur Gautier & Prof Anne-Claire Pache Judith Symonds	ESSEC Business School Sciences Po
<b>Germany</b>	Tine Hessert Dr Rupert Graf Strachwitz	Heidelberg University Maecenata Institute/Muenster University
<b>Italy</b>	Prof Giuliana Gemelli & Dr Alice Brusa	Bologna University
<b>Latvia</b>	Ieva Morica	Soros Foundation – Latvia
<b>Lithuania</b>	Dr Egle Vaidelyte Dr Julianna Kokšarova	Kaunas University of Technology LCC International University, Klaipeda
<b>Netherlands</b>	Pieter Stemerding Dr Pamala Wiepking Michiel de Wilde Dr Rene Bekkers Barry Hoolwerf Bert Sleijster	Adessium Foundation Erasmus University Rotterdam Erasmus University Rotterdam VU University Amsterdam VU University Amsterdam Windsheim University
<b>Norway</b>	Dr Karl Henrik Sivesind & Dr Bernard Enjolras	Institute for Social Research
<b>Portugal</b>	Ana Barcelos Pereira	Calouste Gulbenkian Foundation
<b>Republic of Ireland</b>	Dr Gemma Donnelly Cox John A Healey John R Healey	Trinity College Dublin Trinity College Dublin Trinity College Dublin

Country	Informant	Institution
<b>United Kingdom</b>	Dr Linda Milbourne	Birkbeck University
	Dr Peter Grant	City University/Cass Business School
	Dr Beth Breeze	Kent University
	Dr Siobhan Daly	Northumbria University
	Prof Adrian Sargeant	Plymouth University
	Dr Nicholas Acheson	University of Ulster
	Dr Gareth Morgan	Sheffield Hallam University
	Dr Eleanor Shaw	Strathclyde University
	Nadine Exter	Cranfield School of Management
Dr Celia Moore	London Business School	
Dr Pamela Hartigan	SAID Business School	
<b>United States</b>	Prof David Campbell	Binghampton University
	Prof Roseanne Mirabella	Seton Hall University
<b>Spain</b>	Dr Marta Rey-Garcia	University of A Coruna
<b>Sweden</b>	Dr Ola Segnestam Larrson	Ersta Skondal University
<b>Switzerland</b>	Dr Georg Von Schnurbein	University of Basel

## 5.2 Interviewees

Name	Role	Segment
<b>Anthony Tomei</b>	Independent (Nuffield Foundation until 2012)	Foundation
<b>Paul Ramsbottom</b>	Chief Executive, Wolfson Foundation	Foundation
<b>Pieter Stermerding</b>	Chief Executive, Adessium Foundation	Foundation
<b>David Carrington</b>	Independent	Philanthropy advisor
<b>Judith Symonds</b>	Independent	Philanthropy advisor
<b>Kate Hunter</b>	Chief Executive, CASE Europe	HE development
<b>Lyndsay Lewis</b>	Associate, Richmond Associates	HE development
<b>Chris Murphy</b>	Head of Alumni and Development, Birkbeck University	HE development
<b>Prof David Latchman</b>	Master, Birkbeck University	HE development
<b>Ruth Thomson</b>	Head of Philanthropy, City University London	HE development
<b>Michiel de Wilde</b>	Executive Director, Centre for Strategic Philanthropy, Erasmus University	Philanthropy centre
<b>Dr Rene Bekkers</b>	Professor of Pro Social Behaviour, VU University	Academic
<b>Dr Beth Breeze</b>	Faculty of Social Sciences, Kent University	Academic

Name	Role	Segment
<b>Dr David Campbell</b>	Associate Professor of Public Administration, Binghamton, State University of New York	Academic
<b>Dr Peter Grant</b>	Senior Fellow, City University London	Academic
<b>Prof Roseanne Mirabella</b>	Professor of Political Science, Seton Hall University	Academic
<b>Dr Ola Segnestam Larsson</b>	Department of Social Sciences, Ersta Skondal University	Academic
<b>Dr Egle Vaidelyte</b>	Assistant Professor, Faculty of Social Sciences, Kaunas University of Technology	Academic

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## 5.5 About the authors

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**Tobias Jung** is senior lecturer at the University of St Andrews and lead editor of the forthcoming *Routledge Companion to Philanthropy*, the first international handbook providing a critical assessment of the philanthropy field. Interested in engaged scholarship, Tobias is actively involved in a number of senior voluntary and public sector roles. He sits on the board of the International Research Society for Public Management (IRSPM), is a member of the Advisory Board of the Centre for Public Scrutiny (CfPS) in London, and has previously been an elected member of the Boards of Governors of the St Katharine and Shadwell Trust and of London's East End Community Foundation.

**Cathy Pharoah** is Professor of Charity Funding and Co-Director of the Centre for Charitable Giving and Philanthropy at Cass Business School (CGAP). She is an expert on funding for the third sector, specialising in philanthropy. Recent publications include twin briefing papers on financial trends amongst the top 300 foundations and family foundations, with the Association of Charitable Foundations and Pears Foundation. She has carried out commissioned research for government and many charitable clients, works closely with the donor advisor community, and was Director of Research at Charities Aid Foundation (CAF) for 11 years. She is a founder and assistant editor of *Voluntary Sector Review*, and presents widely on giving and philanthropy.

## About the Diana, Princess of Wales Memorial Fund

The Diana, Princess of Wales Memorial Fund was an independent grant-making organisation established in 1997 to continue the Princess' humanitarian work. The Fund closed in December 2012 having successfully completed an ambitious, time-limited programme of work aimed at securing sustainable improvements in the lives of disadvantaged people in the UK and around the world.

## About CGAP

CGAP@Cass is a consortium of researchers at, or linked to, Cass Business School, City University. It is dedicated to advancing our understanding of giving and philanthropy, and to sharing and disseminating knowledge in philanthropy research, policy and practice. CGAP's current programme looks at the contribution of charitable trusts and foundations, individual and corporate giving, as well as philanthropy education, and the emerging challenges of the new institutions and modes of giving and philanthropy. The work builds on an initial joint award from the ESRC, Cabinet Office and Scottish Government to a set of partner universities and institutions. *CGAP's Five-Year Review 2008–2013* summarises this programme's achievements. For further information see [www.cass.city.ac.uk/research-and-faculty/centres/cgap](http://www.cass.city.ac.uk/research-and-faculty/centres/cgap). Research outputs can be accessed at [www.cgap.org.uk/](http://www.cgap.org.uk/)