



Centre For Charitable Giving and Philanthropy

Call Specification

A joint initiative funded by the Economic and Social Research Council, Office of the Third Sector, Carnegie UK Trust, and the Scottish Executive.

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Introduction

1. The UK's first independent, multidisciplinary, academically based Charitable Giving and Philanthropy Research Centre is being established by a funding partnership including the Economic and Social Research Council (ESRC), the Office of the Third Sector (OTS), the Carnegie UK Trust, the Scottish Executive, and other interested partners.
2. At present, lack of research limits the support of philanthropic giving and distribution. The Centre will support high quality research aimed at developing the necessary evidence base to better understand charitable giving and philanthropy issues, and influence policy and practice decisions in the UK. *Its main role will be to strengthen the provision and use of independent, high quality, relevant and robust research and empirical evidence.* The Centre will adopt a broad view of both individual and corporate giving as an act of citizenship with value over and above its financial worth.
3. The Centre will develop knowledge, capacity and expertise through in-depth longer-term research and development, and will deliver short and longer-term analyses with sufficient rigour and relevance to inform policy and practice decisions. The Centre will produce syntheses of existing knowledge to ensure maximum benefit is obtained from research expenditure. And it will be responsible for the communication of relevant outcomes and analysis through publications, seminars, workshops, professional development support, etc.
4. The Centre will draw together leading experts throughout the UK and beyond, and bring together research knowledge to strengthen the evidence base. It will become a focus for stakeholder engagement, knowledge exchange and transfer, working closely with, and supporting the work of, regional and national bodies and for cross-national and international collaboration. It will support overall research capacity through the development of skilled researchers with expertise in charitable giving and philanthropy research, and by developing and facilitating the use of data and other resources required for high quality research.

Background

5. High quality research and development is an essential component of any successful sector of the economy and the Third Sector is no different. While there is general consensus on some of the core understandings about charitable giving, there remain significant gaps in the evidence base and a lack of clarity in areas of definitions and methodologies. There has been a considerable emphasis on answering questions about 'who?' and 'how much?' but less attention has been paid to the contextual issues, such as the 'why?' of the motivation behind the decision to give, and the "so what?" of direct and indirect consequences which are essential to policy and practice.

6. The UK Government is committed to doing what it can to foster a culture of planned, regular and tax efficient giving. In November 2005 it published *A Generous Society* which sets out its current aims, including:
 - Working with young people. Extending the citizenship curriculum materials to primary schools and enhancing the existing charitable giving curriculum materials for secondary schools
 - Working with employers and employees. The Smart Company on Corporate Foundations has been asked to help inform practical guidance for those setting up a foundation. Support is being given to the Awards for Excellence organised by Business in the Community (BitC).
 - Working with charities. Investing in the support of charities through training events, mentoring and information communication to enable them to make the most of tax effective giving
 - Working in partnership with a wide range of stakeholders. Funding five key stakeholders who clearly demonstrated that they could promote the aims of *A Generous Society*. Providing funding for small charities to improve their fundraising activities.

7. The Economic and Social Research Council has identified with its stakeholders key research challenges where advances in fundamental understandings will be relevant to charitable giving and philanthropy. These include how people make decisions, issues of religion and society and the challenge of a global economy. The Council is also enhancing underpinning data resources and developing new approaches including the use of mixed and international comparative methods. Research supported to date has included work on young people and active citizenship, identity and action and understanding those who do not give.

8. Independent funders in the UK, both the established trusts and foundations and new philanthropists, have taken a lead in recent years in promoting smarter and more effective philanthropy, informed by substantive R&D. Examples include the establishment of New Philanthropy Capital, the Institute of Philanthropy and Philanthropy UK (an initiative of the Association of Charitable Foundations). In 2005 the Carnegie UK Trust commissioned a consultation of foundations across the UK, which endorsed the proposal that a ‘virtual’ research centre to support more creative philanthropy in the UK be established.

9. The Carnegie UK Trust report *Stepping Up the Stairs* found that those involved in philanthropy in the UK had been engaged in three significant debates in recent years. First, a concern about the amount of giving. Second, a concern to improve the processes used in giving money away. And third, to ensure that foundation money focuses on the effective pursuit of social justice as the key outcome. The report concluded that there was a need for a research Centre that would assist foundations and philanthropists to be able to understand and address each of these concerns more creatively.

Strategic Objectives of the Centre

10. As stated, the main aim of the Centre is to strengthen the provision and use of independent, high quality, relevant and robust research and empirical evidence on the identified big questions facing charitable giving and philanthropy. The mission

statement for the Centre is *“to be a centre of excellence for independent, high quality, innovative, strategic research, focused on enhancing and disseminating the evidence base to inform charitable giving and philanthropy issues and development, and a hub for engaging national and international stakeholders, capacity development, and knowledge exchange.”*

11. The Centre will pursue this through conducting its own high quality research programme and through a range of other activities including the networking of research and other forms of expertise, the development of research capacity, stakeholder engagement and knowledge exchange activities. Collaboration with experts in other organisations (in universities, research think tanks and other Third Sector bodies) will be an important feature of the Centre as will close linkage with statutory bodies at national and local level.
12. The Centre will undertake a range of activities and will build on existing networks (such as the Voluntary Sector Studies Network). It will:
 - Carry out longer term, in depth, research aimed at enhancing the evidence base, informing practice and key policy options. Longer-term research provides the Centre with the opportunity to develop innovative approaches to tackle these questions. This approach will provide the necessary balance of fundamental and applied research, addressing important intellectual challenges, thus helping to ensure the credibility and independence of the Centre. It will be particularly important for the Centre to address research questions in such a way as to provide insights from a range of contributory disciplines including (but not limited to) economics, psychology, sociology and political science.
 - Act as a co-ordinating hub of a research network drawing together leading experts and stakeholders throughout the UK and beyond. This could include, for example, a range of activities such as conferences & thematic seminar groups, electronic discussion forums and networking, website portal, etc.
 - Draw together and disseminate research knowledge (within the UK and internationally) to strengthen the evidence base for charitable giving and philanthropy policy and practice (e.g. through synthesising / reviewing research relevant to key policy debates, establishment of expert groups or limited life working groups, and publishing the results through paper and electronic media, seminars, training programmes and workshops).
 - Become a focus for stakeholder engagement, knowledge exchange and transfer, working closely with, and supporting the work of, local, regional and national organisations. This could include for example placements, secondments and exchanges, research policy seminars, briefings and/or advice notes, joint training activities, access to on-line research resources, etc. The Centre will be expected to publish and disseminate the results of its work in order to achieve effective communication and engagement. This will include a website to be set up and maintained by the Centre
 - Support the development of research capacity, through the development and training of skilled individuals with expertise in charitable giving and philanthropy policy and practice-relevant analysis and research. For example, the Centre application may include funding for linked research studentships (subject to it being a recognised ESRC training outlet), support for research fellowships, organisation of training and development activities and training materials, reviewing data needs etc.

- Exploit existing data sources and where needed create new data sources that will underpin further research.
 - Enhance research methods in the area, especially the use of mixed methods and international comparative research.
 - Become a focus for cross-national networking and collaboration (e.g. through international conferences, visiting fellowships and the development of collaborative
13. It will be essential that the Centre builds in flexibility and responsiveness into its research programme. In particular it must have the capacity, through its research, networking, engagement and/or other proposed activities, to address emergent cross-cutting evidence needs and to feed meaningfully in a timely way into relevant strategic debates and into policy formulation and implementation, while addressing its longer term objectives in terms of fundamental research.

Structure of Centre

14. The structure of the Centre will take the form of a ‘hub and spoke’ model where a lead organisation (the ‘hub’) works in close collaboration with expert groups, possibly based at different organisations (the ‘spokes’). The hub and spokes together will constitute the Centre.
15. Eligible institutions may apply for either the Hub and/or one of the Spokes. Separate applications must be made for each element e.g. the hub and each spoke. An institution may apply for the hub only, the hub and one or all of the spokes or only one or more spokes. However, the funders would encourage institutions to apply for more than one spoke and would expect the hub institution to be of such a calibre so as to be in a position to also apply for a spoke.

16. Applications for Spokes are invited in 3 areas:

1) Individual and Business Giving

Key issues include:

- Levels, structures, patterns and variations in individual and private/business giving
- Motivations, priorities and decision making processes for giving of different types, in different settings and from different sectors
- Tangible and intangible impacts of giving, and perceptions and effects of these.
- Types of and issues in new forms of giving
- The effects of specific interventions (including public policy, fundraising, tax incentives and regulation) on levels and patterns of giving.
- Effective mechanisms for encouraging giving.

2) Charitable Giving and Social Redistribution

Key issues include:

- Effects of charitable giving on social and economic inequality
- Relationships between philanthropists and beneficiaries

3) Institutionalised Giving Structures

Key issues include:

- Structures, patterns and motivations of institutionalised giving
- Factors influencing the above
- Why and how do new forms of, and new donors to, philanthropy emerge
- What and where are the impacts of institutionalised giving, and how are they measured
- Relationships between governments, state provision, institutionalised giving structures and patterns of distribution and need.

17. Spokes, led by the coordinating Hub, will also demonstrate strong leadership and a clear strategic vision. Each Spoke will comprise teams of leading experts from a range of disciplines working in partnership with practitioners, policy makers and wider stakeholders.

Eligibility and Evaluation Criteria

18. Applications will be evaluated on the basis of four overarching criteria:

- scientific excellence (both past and potential)
- contribution to the aims and strategic objectives of the Initiative
- engagement with practice and policy
- strategic management

19. Applicants must demonstrate the added value that would be achieved by bringing together a critical mass of expertise through multi-disciplinary collaboration and provision of additional resources.

20. Only those proposals which demonstrate that they meet the following criteria are likely to succeed:

- A commitment to multi-disciplinary working demonstrated by including leading academic experts who encompass a broad range of research disciplines
- The capability to undertake a high quality and broad programme of research that will potentially have a major impact. A key aim of the research programme should include encouraging the translation of research into policy and practice
- A strong career development programme focused on encouraging new researchers and providing increased opportunities for established investigators. The programme should also aim to attract collaborations with leading researchers currently working outside the field of charitable giving
- Strong leadership and a clear strategic vision.
- A willingness to work together and to form strong collaborative links with the wider charitable giving research community. Partnerships with practitioners and policy makers must be clearly defined. Bidders must demonstrate a clear understanding of stakeholder needs and how stakeholder groups will be involved at the various stages of development.
- The ability to contribute to the global research effort in this area and to provide a clear vision of how they would engage with the leading edge of international research.

- A clear vision for the development of a communication strategy, to cover communications between hub and spoke/s, the Centre as a whole and stakeholders, and between stakeholders.¹
- Clear organisational commitment. Host organisations must demonstrate a strong commitment to research in their field of expertise through consistent support of senior academic posts. Funding provided through the initiative will be on a fixed term basis (see *Funding* section below).
- Applications to host the Centre hub must demonstrate a robust management structure with a nominated director(s) and clear arrangements for co-ordination and management of the strategic direction of the Centre

21. In their proposal applicants should include detail on:

- the proposed scientific and strategic vision of the centre
- key objectives of the proposed Hub and/or Spoke
- the proposed programme of activities
- a draft set of major outcomes
- the added value of long-term support in the form of a co-ordinated Centre
- how the Hub and/or Spoke fits with the host organisation's financial and academic strategies, as well as plans to develop research performance, research capacity and infrastructure.
- If applying for the hub detail should be included on the proposed named Director and justification for their suitability for this role including their experience of multi-disciplinary working and how engagement at a management level will be fostered from all participating disciplines (see Guidance Notes for Applicants for a fuller description of the role of Directors)

Funding

22. Funding will be allocated as cash limited awards and will be made at a rate of **80% of Full Economic Costs (FEC)**². Successful applicants should be able to recover further costs via their institution's arrangements for charitable support.

23. Awards will be indexed against inflation. However, Proposal budgets should be for 100% of FEC at current prices.

24. Awards will be made on a competitive basis. A total of **£2.2million** over 5 years is available for the Centre as a whole. Applications for the Hub must not exceed £300,000 FEC at current prices over a 5 year period. Applications for each spoke must not exceed £500,000 FEC at current prices over a 5 year period. Applications exceeding these cost limits will not be considered. Some funds will be retained by the funders to commission emergent research over the lifecourse of the Centre.

25. Applicants may apply for support for:

- New academic posts ranging from senior posts to junior fellowships

¹ A detailed communications strategy will be developed in consultation with the ESRC communications and knowledge transfer team and other funding partners once award/s are made.

² This figure is calculated on the basis of the differing relative rates of FEC paid by the contributing Government Departments and Research Councils, and the categories of costs supported by the participating charities, in line with the current funding policies and practices of the funding partners.

- Training and career development programmes for the Centre and for the wider community
 - Infrastructure such as resources including technical staff, IT systems and equipment, administrative support, data, research facilities and other support costs necessary to underpin Centre research activities
 - Funds for outreach work and collaborations with policy makers, practitioners and service users
26. The core award for the Centre will be issued and managed by the ESRC in accordance with its normal research funding procedures.
27. It is anticipated that the Centre will attract co-funding from other sources to support research and analysis outside of its strategic research programme and to develop or expand its core functions as appropriate. Therefore, at any time, the Centre may apply for programme/project grants from relevant Research Councils and any other research funding organisations. This will cover additional work not defined on the core contract.

Application Procedure

28. This call is for **Full Proposals**. This competition does not feature an Outline Proposal stage.
29. The closing date for applications is 4pm on **Tuesday 14th August 2007**. Proposals received after this time will not be accepted. It is strongly recommended that applicants allow sufficient time for completion of all institutional submission processes, checks and authorisation.
30. All applications **must** be made on the **Je-S Application Form**, which is available at <https://je-s.rcuk.ac.uk/eforms/secure/Login.asp>. Postal or other forms of submission will not be possible. Hard copies are not required.
31. Full guidance notes giving further details on eligibility and how to apply are available on the Current Funding Opportunities page of the ESRC website at www.esrcsocietytoday.ac.uk. The ESRC is responsible for implementation and administration of this scheme on behalf of all of the funders. The Scheme Secretariat is based at ESRC, Polaris House, Swindon, SN2 1UJ. All queries or comments about this Joint Scheme should be addressed in the first instance to Ian Farnden at the ESRC ian.farnden@esrc.ac.uk. Queries will be shared with representatives from other funders, as necessary.
32. It is expected that one or more briefing meetings for potential applicants will be arranged. Details will be published on the ESRC website as soon as dates and venues are finalised.

Assessment of Applications

33. Proposals will be peer reviewed, by external academic and user reviewers. Applicants will be able to nominate potential reviewers when submitting their full proposal. Applicants will be given the opportunity to respond to reviewer comments. The

proposals, along with the reviewer comments and applicant responses, will then be assessed by an expert Commissioning Panel.

34. Applications will be assessed, against the criteria set out above, by an expert Commissioning Panel drawn from the UK and international academic community, and potential research users. Panel membership will be published on the ESRC website in due course. Applicants may neither approach nor canvas Panel members. Should an applicant do so, any existing or subsequent application to the competition will be rejected. The Commissioning Panel will, based on assessments of scientific quality and fit to the requirements of the specification, make recommendations in respect of funding for ratification by the Centre's Steering Committee.
35. It is expected that applicants will be invited for interview at the Commissioning Panel's assessment meeting.
36. The Centre's Steering Committee, comprising an independent Chair, funders' representatives and academic experts, will meet regularly throughout the Initiative. The Centre will be monitored by, and report to, the Centre's Steering Committee, in co-ordination with ESRC. Key milestones will be identified for performance review as well as ongoing monitoring and feedback arrangements. Once established the Centre will take on responsibility for organising and providing the secretariat for the Steering Committee.
37. Formal decisions will be announced in **October or November 2007**. Applicants should be aware that if they are successful the Steering Committee may wish to apply some conditionality on an award and that it is expected that there will be subsequent negotiations on the details of the support offered.
38. It is envisaged that the Centre will commence in **December 2007** at the earliest.

Key Commissioning Dates

Call for Full Proposals	18 June 2007
Briefing Meeting/s	July 2007 tbc
Deadline for Full Proposals	14 August 2007
Panel Meeting (interviews)	October/November 2007 tbc
Decision ratified and notified to applicants	October/November 2007
Contract negotiation complete and announcement of awards	November/December 2007

Contributing Funding Organisations

Economic & Social Research Council
www.esrcsocietytoday.ac.uk

Office of the Third Sector
http://www.cabinetoffice.gov.uk/third_sector/

Carnegie UK Trust
<http://www.carnegieuktrust.org.uk/>

Scottish Executive
<http://www.scotland.gov.uk/Home>

ANNEX: Research Areas and Questions

The following is the result of development work undertaken by the funding partners and is provided for information. The lists of possible research questions are intended to be neither prescriptive nor exclusive.

Introduction

The focus of this new centre will be on understanding the social, psychological, economic, political, ethical and global dynamics of charitable giving in the twenty first century. It will aim to:

- develop our empirical and theoretical knowledge of the extent, social characteristics and motivations of individual and group charitable activity;
- investigate different perceptions and meanings of ‘charity’;
- examine the relationship between charitable giving and social diversity, social solidarity and social justice;
- examine the social relations between donors and recipients, and the impact of charitable giving on recipients.
- extend our knowledge of the aims, methods and fundraising techniques used by charitable organisations.

Charitable giving is a relatively new area of academic investigation emerging from the growth of voluntary organisation research which followed the Wolfenden Report in 1978. Surveys from the NCVO, CAF and FES all show a decline in charitable giving over the last decade of the twentieth century, and charities have responded with a concern to know who gives and how to target them. However, the phenomenon raises broad social and intellectual issues about the relationship of giving to issues of social solidarity, social diversity and social justice; as such, it is an area that would benefit from new theoretical thinking, new methodological approaches and new forms of data. There is little precision about concepts such as ‘charity’ and ‘charitable giving’. Much data depends on large scale surveys which do not investigate in any depth the perceptions and meanings of charity to different social groups, nor the claims that people might make, and why they make them.

Proposed Research Areas

It is suggested that no more than 3 areas and associated research questions are identified due to limitations on budget and the range of topics to be covered.

Individual and Business Giving

There is a need to understand more about who gives, why, where and when. We know that the ‘typical giver’ is a middle class, middle aged, educated and religious mother, but how and why do motivations and perceptions vary by social class, ethnicity, geographical location, cultural background and identity, gender, generation and age? How do faith and identity affect likelihood of individuals or groups to give, the way people give and the destination of their donations? What explains the differences in charitable giving between the rich and poor and why are motivation different?

The study of motivations to give has tended to fall into two camps – those derived from neo-classical economics which focus on enhancement to individual well being; and those derived from the study of altruism which emphasise the norms and values of groups and society. New methods and cross-disciplinary approaches to the question of motivation

could be applied to this issue. The basis of altruistic behaviour can now be examined using a combination of methods from social neuroscience, neuroeconomics, and experimental economics. More or less altruistic behaviour can now be studied with the help of neuroimaging techniques (for example, MRI, PET, TMS). These permit a better understanding of how trust, empathy, altruistic cooperation, reputation formation, and fairness are processed in the brain with particular consequences for social action. Although there are unlikely to be sufficient funds to allow research using these techniques there may be research in this area that can be drawn upon.

Behavioural economics largely looks at observable financial behaviour but, unlike conventional economics, has different assumptions about rational behaviour under conditions of uncertainty and incomplete knowledge. Charitable giving would be a key example of where the behaviour does not appear to be rational. Such approaches could be complemented by research which looks at how far charitable giving enhances or diminishes social solidarity. Do people who give and take part on charitable activities have an understanding of themselves as participating citizens? How do children understand giving; when do non-givers become givers, and vice versa? Is there an ethic of giving and what is it related to? How does it relate to trust and empathy? Does charity begin at home?

The level of UK corporate giving is low, with less than 1% of companies making donations to charity. Under English law, Directors of companies can only justify such charitable giving as they consider to be in their company's best interests. However, shareholders may authorise Directors to act in ways which would, if not authorised, be a breach of this duty. Tax incentives can play a role in supporting businesses and their employees to become more involved in their local communities, but indications are that many tax incentives are underused and poorly understood.

Specific Research Questions might include:

- What is the structure of individual and/or corporate giving - by size, date, geography, focus etc? What sectoral differences exist in giving? How might these be explained? What regional and seasonal differences exist in giving? How can these be explained?
- How might a better understanding of concepts of giving and voluntarism in a cross cultural context be developed?
- What are the motivations, priorities and decision making processes for giving? How can these inform fundraising?
- How are priorities set? eg why do individuals seem to want to volunteer for environmental work but not so much for tackling poverty or inequality?
- How are impacts of giving perceived? How might givers be directly connected to impacts as a way of being motivated to give?
- What scope is there for enhancing rates of giving from the top 1% of earners?
- What is the role of trust? Which fundraisers and/or mechanisms are perceived as more trustworthy?
- How might the role of the media in promoting giving be enhanced?
- What are the relationships between giving and citizenship? How can the development of social capital in communities and the role of the state as enabler of and partner to non-state social interventions be promoted? What are the best indicators for giving and social capital within and across communities?

- What intangible benefits accrue as a result of charitable giving and can be used to justify properly considered and targeted giving? How are these understood and acted upon?
- What are the perceptions and realities of the value of corporate giving, eg in securing good publicity, improved relationships with local communities and/or central or local government, improved employee recruitment, etc?
- How are shareholders' interests engaged in decisions to participate in philanthropic activities? Would changes in company law be effective in promoting more effective giving, without decreasing profits?
- Is the full range of corporate options for charitable giving understood? What innovative opportunities are becoming available for these to be better taken up?
- How might employee volunteering and Payroll Giving schemes be further supported and encouraged? How might staff secondments be further supported and encouraged?
- What interventions including public policy and tax incentives influence giving and performance? How are tax and other incentives understood and acted upon? What are the relative advantages of specific vehicles for giving, such as payroll giving, discretionary income tax? Could changes in tax law be effective in promoting higher levels of giving, without decreasing revenues? How might the use of tax efficient giving, particularly by higher rate taxpayers and high level givers, be promoted?

Charitable Giving and Social Redistribution

The reality of charitable giving presents a paradox which requires further explanation: whilst the popular perception of charity is of a shift from those 'with' to those 'without', the reality is that those on lower incomes give a greater proportion of their income to charity than those on higher incomes. This raises the methodological question as to how we measure and compare generosity as well as the wider issue of the redistributive capacity of charitable giving. Does charitable giving mitigate or reinforce social and economic inequalities? The issue of redistribution concerns not only those who give but also those who receive. Who are the recipients of charitable giving; how do they perceive receipt?. What is the impact on recipients (empowering or not?), and on particular social problems? The context for this question is the relationship between charitable activity and statutory forms of social provision and poverty alleviation. Does charitable activity fill gaps, provide an extra safety net, identify new needs? Is the extent and motivation of charitable giving related to any of these characteristics? These research questions also call for cross-national comparison between the UK and other countries with high and low levels of charitable giving.

The social relations between giver and receiver of charitable donations is a third important area. Is there a relationship between donor and receiver that precipitates giving? Are some considered more 'deserving' and if so, how? How is need understood by givers? Are conditions attached to receipt or to eligibility to receive? Is it a gift relationship to a 'universal stranger'? Do givers trust the mediating organisation to allocate fairly? Do they want contact with the receiver?

Specific Research Questions might include:

- In what circumstances does charitable activity mitigate or reinforce social and economic inequalities? What are the best ways to address specific social

problems? Does giving fill gaps, provide an extra safety net, identify new needs, etc?

- How might the relationship between fundraising and distribution be better established and understood? How can understanding of how and where donations are used be improved? What specific tools and practices may encourage more effective and sustainable distribution?
- What are the best ways of measuring and comparing patterns of giving and their impacts, both within the UK and internationally? How do UK practices compare with those in other countries?
- How do regulatory bodies influence giving, fundraising etc? What are the effects of perceptions of sectoral responsibilities? What are the impacts of fundraising on fund diversion by public bodies?
- What are the best mechanisms for giving in particular circumstances? What are the existing and potential roles of intermediaries? What 'products' might encourage and build giving?
- What are the relationships between philanthropists and beneficiaries? How do beneficiaries perceive receipt?. In what circumstances are impacts on recipients empowering, or not? How is need understood by givers? What are the impacts of concepts of 'deserving' and 'undeserving'?
- What are the 'big' issues and the role of givers in new philanthropy? Encouraging distribution for change and social justice
- How might charitable giving foster the growth of more diverse and pluralistic educational provision?

Institutionalised Giving Structures

These questions focus on structures and processes for distribution of donated resources and their impacts on sustainable social change for wider public benefit. Under this heading we include charitable trusts and foundations, but wish to recognise other forms of distribution structure.

Specific Research Questions might include:

- How might the structure of institutionalised giving - by size, date, geography, focus etc – best be understood?
- Who creates institutionalised giving structures and why? What factors are most conducive to formation? How do institutions acquire knowledge and learn?
- What are the circumstances in which institutionalised giving structures become economically viable?
- Why are specific forms of institutionalised giving structures chosen over others? How does philanthropic giving fit with other forms of funding charitable/Third Sector/social enterprise activity? How does it link, for example, to investment funding and to traditional grant giving?
- Why and how do 'new' forms of philanthropy emerge? What are 'new' forms, how are they different and how do they impact on both outcomes and grantmaking?
- What influences distribution decisions and patterns? What values are in play? How is public benefit and social justice understood? Is there change over time?
- What and where are the impacts of institutionalised giving? How are they measured? How is performance measured? How might these best be measured?

- How might partnerships be developed between the state and philanthropic giving to deliver on joint outcomes
- How could bureaucratisation of philanthropic giving be avoided in light of state needs for accountability for the public expenditure elements of joint ventures? Is there a special value in transparency, or is it limiting?
- Are there dangers in 'democratising' giving? Should grant-makers be accountable and if so, to whom?
- How might philanthropic projects successfully be mainstreamed?
- What is the relationship between giving structures and the development of capacity and capability in funded organisations?