

# HOW TO CHANGE THE WORLD:

## WHAT DONORS WANT FROM THEIR PHILANTHROPY

OXFAM EXISTS TO END POVERTY BY HELPING PEOPLE FIGHT  
IT TODAY AND ROOT OUT ITS CAUSES FOR TOMORROW



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LIVE  
WITH  
POVERTY

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- 3 Insights – Interviews with Philanthropists
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- 5 Summary of Key Findings & Conclusions

# PROJECT METHODOLOGY



CREDIT: KIERAN DOHERTY/OXFAM

# THE PROCESS & PROJECT METHODOLOGY

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## DESK RESEARCH

## IN-DEPTH INTERVIEWS

## ANALYSIS

## SHARING AND IMPLEMENTING

- 
- A review of existing literature on current trends in philanthropy, UHNWI engagement with brands and brand experiences offered by luxury brands

- 
- Qualitative in-depth interviews:
  - 23 philanthropists
  - 12 wealth managers and philanthropy experts

- 
- Detailed analysis of interviews and coding of interview transcripts.
  - What are our stakeholders telling us? Where are the common themes? Taking a step back to look at wider trends and implications for INGOs, including Oxfam

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- Sharing insight with colleagues and applying the learning to how we engage our philanthropic supporters

# DESK RESEARCH SUMMARY



CREDIT: ABBIE TRAYLER-SMITH/OXFAM



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# THE LANDSCAPE



CREDIT: TOMMY TRENCHARD/OXFAM

- We are said to be living in a golden age for philanthropy. More and more wealthy individuals are donating significant amounts to charity, and experts predict that this trend is set to continue.
- A greater expectation that the very rich will give away significant proportions of their wealth has been established through initiatives such as The Giving Pledge (through which the world's richest people publicly declare their commitment to philanthropy) and an increasingly loud global conversation around inequality.

# THE SIZE OF THE OPPORTUNITY

The UK market for million pound gifts is large, growing, and is predicted to continue to grow in the coming decade.

£1.83 BN

Total value of donations worth £1m+ in 2016

# GREAT EXPECTATIONS



CREDIT: TOMMY TRENCHARD/OXFAM

- ‘Chequebook philanthropy’ where donors are not closely involved in how their money is spent is diminishing.
- There is increasing desire to:
  - Focus on and solve an issue
  - Take a business approach
  - Use philanthropy networks to learn and maximise the impact of philanthropy
- This audience is doing more, but also expecting more: better information, impact and partnership.
- They want to use disruptive thinking to “solve problems rather than salve wounds.”



# THE ASPIRATION GAP



CREDIT: ABBIE TRAYLER-SMITH / OXFAM

- Many philanthropists are experiencing frustration rather than fulfilment from their giving.
- Although the majority of philanthropists are motivated by creating positive social change, most large donations go to other causes, such as education and health.
- Barriers to giving big gifts to social change include:
  - Concerns about measuring impact
  - Difficulty identifying the right organisation
  - A perceived lack of ambitious projects that need donations at this level

# THE NUMBERS

80%

of philanthropists want to contribute to positive social change

yet just

20%

of big gifts go towards social change issues

90%

of millionaires surveyed by UBS  
America say they are serious  
about their philanthropy

but

80%

say they do not believe their  
giving to be effective

# INTERVIEWS WITH PHILANTHROPISTS



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# IMPACT & THE BUSINESS OF GIVING

- Philanthropy is seen as an investment and people are applying the same rigour and accountability to their philanthropy as they would to a business transaction.
- Research into organisations, for example through consulting fellow philanthropists, interrogating annual reports or making small 'pilot' gifts is seen as crucial before engaging, to determine whether a charity can be trusted to spend a donation effectively.
- This audience ensures that they are well-informed in their decision-making and expect transparency and accountability from charities. Once this has been demonstrated and a level of trust is established, the demand for this level of detail subsides.



CREDIT: ALEXIS HUGUET/OXFAM

- There is an increasing desire to see the biggest possible impact from a donation and to permanently solve a problem.



*"I might think of myself as buying an output – the output is reducing suffering in that situation. How much suffering reduction will that buy me?"*

- Philanthropist

# COMMUNICATION

- A common perception among philanthropists is that charities are prone to putting a 'spin' on the facts to show them in the best possible light to potential funders.
- A lot of commonly used language in charity communications was seen as jargon.
- A charity's message is seen as more authentic and trustworthy when it comes from an independent, objective source, such as a peer, or a member of programme staff, who philanthropists felt would give them a more honest and reliable perspective.



CREDIT: KIERAN DOHERTY / OXFAM

- Philanthropists don't expect complex projects to progress perfectly. They want candid interactions with charities: sharing the whole picture 'warts and all' increases trust.

*“You know things on the ground change, but in a business project if that happened you would come back to the partner and say things have changed... That doesn't really happen very well in the charitable context.”*

- Philanthropist

# LEARNING

- Philanthropists are keen to engage with the issues they support, and understand the relevant context and theory.
- There is a desire for objective discussion, debate and unbiased information.
- Many wanted to learn about philanthropy as a family, and share their learning with the next generation.
- Our interviewees wanted to connect with other philanthropists to exchange ideas, compare notes and maximise impact.
- Philanthropists do not believe that charities have all the answers, and welcome the opportunity to contribute their own thoughts and expertise as well as speak with experts.



CREDIT: VINCENT TREMEAU/OXFAM

*"They care and will have interesting thoughts...what's going to be interesting?"*

- Wealth Manager



# INVOLVEMENT



CREDIT: KIERAN DOHERTY / OXFAM

- Supporters are looking for meaningful engagement with charities that allows them to donate more than just their money, and to gain a deeper level of fulfilment.
- There is a desire to be involved, to invest their time, and to be able to share their skills and expertise with partners. They were not finding ample opportunities to do so across the charity sector.
- The desire to be more involved does not mean that donors want, or believe they have the knowledge to design development projects. However, there was a frustration with only being offered 'ready-made, pre-packaged' projects. They want to feel more informed, to be brought into a project at an earlier stage and to feel more like a partner.

*“They want to be more involved than just writing a cheque, they want to be involved, for example, on a board, a spokesperson and to feel like they can get their hands dirty.”*

- Philanthropy Expert

# RECOGNITION & THANKS



CREDIT: KIERAN DOHERTY / OXFAM

- Some individuals felt like they weren't getting all that they wanted from their philanthropy, and many had felt like they had been treated like an ATM when giving to a charity.
- The importance of recognition and thanks from their giving came up in many forms, meaning different things to each individual: from the ability to learn and grow their philanthropic approach, to having greater access to programme information and senior staff, to holding roles and titles on behalf of a charity.
- Bespoke, personal relationships are essential in building trust, recognition and helping supporters feel valued and fulfilled.

*“There is nothing more irritating, nothing more irritating than being involved in a charity and you have to chase the people to return your call and you never get told anything and they only want to speak to you when they want a cheque and they don’t talk to you in between when they don’t want the cheque.”*

- Philanthropist

# CONCLUSIONS



CREDIT: GABREEZ/OXFAM



# WHAT PHILANTHROPISTS WANT

1. **Authentic relationships:** no charity 'spin', transparent and honest communication. They do not want to be pitched at or to have mistakes covered up.
2. **To see impact:** a desire to see the biggest possible impact from a donation and to permanently solve a problem, with increasing expectations around reporting on impact from charities.
3. **To be able to learn:** they want to learn about charities, causes and how it all works, which helps them to develop their own philanthropy.
4. **To be involved:** to an extent – not to design – but to be involved, to use their skills, to be heard and to feel part of the organisation.



CREDIT: ALLAN GICHIGI/OXFAM

5. **To be a part of the solution in solving poverty:** they want Oxfam to have a voice, but they also want to be part of the solution and not just seen as part of the problem

# IMPLEMENTING THE INSIGHT: EXAMPLES



## IMPACT

£10M LOAN

The team worked with the Meditor Trust to identify which humanitarian programmes were most at risk when institutional funding was temporarily suspended. Hear more about the loan [here](#).



## COMMUNICATION

EDP REPORT

The Enterprise Development Programme increased the level of detail in its annual report, was clearer about project challenges, and modelled its presentation on business reports.



## LEARNING

EVENTS

We are developing a programme of learning events, on topics including monitoring and evaluation and how Oxfam works in emergencies. These are available to current supporters and the public.



## INVOLVEMENT

CEO RECRUITMENT

Key supporters were invited to meet Oxfam's chair to discuss the attributes they felt would be important in our new CEO. The acceptance rate was higher than most other events.



OXFAM IS COMMITTED TO LISTENING AND LEARNING.  
TO CONTINUE THE CONVERSATION, OR TO HEAR ABOUT OUR  
LATEST WORK, PLEASE GET IN TOUCH.  
WE WOULD BE DELIGHTED TO HEAR FROM YOU.

[philanthropy@oxfam.org.uk](mailto:philanthropy@oxfam.org.uk)



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**AUTHORS:**

BRYONY TIMMS, TILILE PEACOCK, JOY REDDY & KATE SILLIS

PHILANTHROPY & PARTNERSHIPS, OXFAM GB WITH KIM VAN NIEKERK

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[philanthropy@oxfam.org.uk](mailto:philanthropy@oxfam.org.uk)

