

Philanthropy: A Leader's Role in Community

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Abstract

This study of philanthropy donors in Appalachian Ohio was conducted with the purpose of understanding giving within a rural region. The research was initiated with an ultimate goal of increasing endowed assets in communities that are experiencing philanthropic poverty. The data collected from donors utilizing post-positivist qualitative research methods revealed not only donor giving rationale, but also steps community leaders can take to encourage giving communities and build philanthropic assets that will permit communities to help themselves.

Introduction

Philanthropy is a missing resource in the 29 county region known as Appalachian Ohio. This region, situated in the eastern and southern portions of Ohio, accounts for one-third of the state's land mass and 12% of the population but holds only 2% of philanthropic assets (Foundation for Appalachian Ohio, 2000). In addition, the Appalachian counties receive only 2% of the total giving awarded from Ohio's philanthropic assets (Donor's Forum of Ohio, 1998). Appalachian Ohio is experiencing philanthropic poverty. Philanthropic assets within the region are insufficient to assist community development.

The philanthropic, independent sector has been the fastest growing sector of the economy in the United States (Ha, 2000). From 1980 through 2002, foundation assets grew three-fold (Hein, 2003). In order for Appalachian Ohio to harness part of this expansion for its own use, an understanding of why current philanthropic donors choose to share their assets in this region must be gained. Community leaders, in particular, should to be aware of the value of philanthropy and its role in promoting the common good. As stewards of community assets, leaders should also be familiar with actions they can take to nurture a community environment that encourages philanthropic giving and the development of philanthropic resources.

A Review of the Literature

Philanthropy is a concept without a disciplinary home (Schneewind, 1996). It is a liberal art; it is a human art. Philanthropy is a prize communities and organizations seek for its ability to provide resources required to conduct their work and a virtue people strive to possess for the internal and external recognition. Philanthropy is a word tossed about in conversations with no real common understanding as to what it truly means.

The root of the word philanthropy, *philanthropia*, comes from Greek. It means love of mankind (Council on Foundations, 2000a). When talking of giving, the words charity and philanthropy are often used interchangeably. However, they are not the same. A key difference is that philanthropy seeks to address the root cause of a problem while charity seeks to alleviate the suffering inflicted by the problem (Mittenthal, 1999; Pifer, 1987). Other differences noted when comparing philanthropy with charity include future versus present focus (Pifer; Payton, 1988; Karl & Katz, 1987), strategic versus emotional giving (Hewa, 1997), and influencing common good rather than impacting individuals (Bremner, 1994; Mittenthal).

The roots of philanthropy run deep in America. Key to this is the country's rich religious roots (Karl & Katz, 1987), history of mutual assistance (Biddle, 1953), and democratic form of government (Karl & Katz, 1987; Council on Foundations, 2000b). Through the years, philanthropy has taken different forms, worn many labels, and taken many shapes. For example, retail philanthropy was first used by the great philanthropists and consisted of responding primarily to individual requests. Because this was so burdensome and impractical, a wholesale approach was created whereby the gifts were given to organizations that, in turn, responded directly to the needs of the individuals (Grimm, 2002). Another approach to giving is venture philanthropy, modeled after venture capitalism. In this scenario

the donor seeks information, personal involvement, and to build a more effective organization (Morino, 2000; Whitford, 2000).

Understanding community is important when looking at philanthropy. Like philanthropy, the word can be difficult to define (Biddle, 1953). For the purposes of this work, the definition established was an association of people that act in concert in meeting the common needs that center on these basic conditions: physical, economic, government, and social (Morgan, 1942; Swanson, Coehn, & Swanson, 1979).

Community affects philanthropy. Community is the place where culture and tradition are maintained and preserved (Morgan, 1942). Tradition, values, and culture play an important role in philanthropy (Schneider, 1996). The focus of philanthropy is on the public good, the community. The social structure in community is also important, as it is a person's social group that has a strong influence on the character and amount of giving. Consequently, giving varies from community to community (Schneider, 1996; Andrews, 1953).

Since the Industrial Revolution, business has been an important piece of philanthropy but it was not until the 1950s that modern corporate giving was born. Initially, business giving was often directed at benefiting a company's workers (Himmelstein, 1997). In the modern era, social responsibility and the notion of good corporate citizenship have been the driving forces. Corporate giving is not strictly altruistic. Companies have much to gain by the sharing of their wealth. Benefits include loyal employees, stronger brand recognition, and better corporate image (Himmelstein, 1997; Wulfson, 2001; Royal, 1998).

Economic models have been applied to philanthropy and giving. Hyde (1983) introduced the idea of gift and market economies, which operate on the characteristics of obligation and self-orientation respectively. Gift economies seem to create community while market economies fragment them.

Another economic model was that of Rational Man adapted for Rational Philanthropy. Based on the idea of an investor making decisions on the goal of getting the most bang for the buck, rational philanthropists make choices based on future wealth (Ulibarri, 2000). Will the future generation be better served through market investment or social investment made in the form of a gift to a social or cultural institution?

Philanthropy is the capital critical to the maintenance of civil society; that space between government and individuals in which the business of society is

transacted. Voluntary associations, critical to democracy, operate in the space of civil society (White, 1997; *A Call to Civil Society*, 1998). Sufficient philanthropic capital is vital for a strong civil society, which, in turn, is crucial to maintaining a strong democratic government (Mathews, 1995).

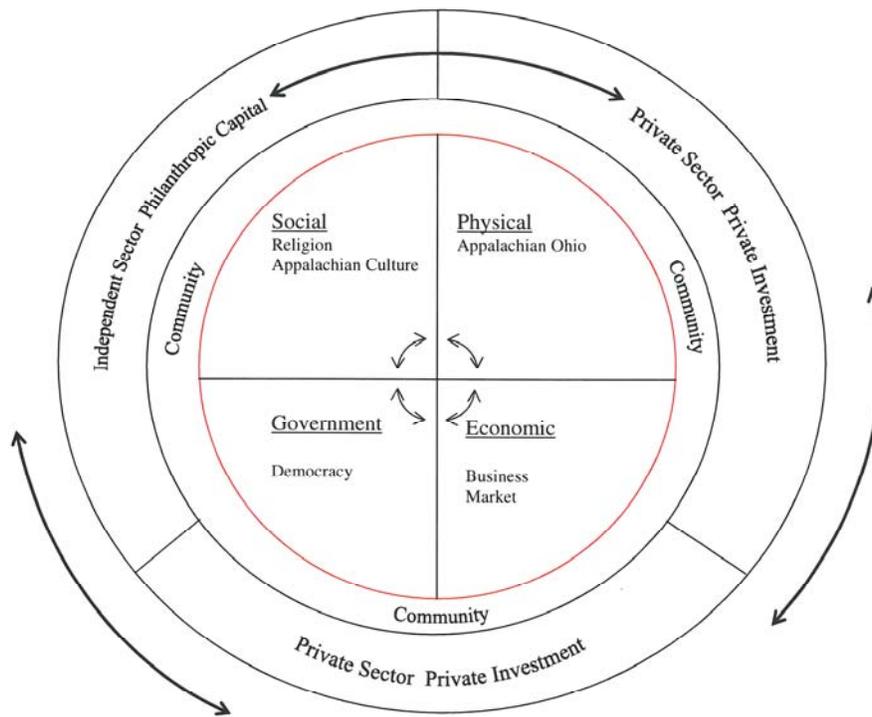
Appalachian Ohio is a 29 county region situated in the eastern and southern of the state. The region tends to be poorer, older, and less educated than the rest of Ohio. Traits of the people of Appalachia include individualism, racism, sexism, patriotism, isolationism, family, and simultaneously exclusion and inclusion (Fisher, 1999). There is also a lack of future orientation. Religion is a significant part of people's lives (Greenlee, 1993). The region also tends to have highly stratified social classes (Duncan, 1999; Maggard, 1999; Fisher, 1999).

The review of the literature can be summarized by envisioning a model involving three concentric circles (see Figure 1). Working from the inside out, this model begins with the core of the community represented by four characteristics: physical, economic, government, and social. The arrows indicate the interaction and impact these characteristics have with and upon one another. Encasing the characteristics is the circle of community, as each of these parts creates community.

The outer circle illustrates the three sectors that are at work within the community. Public, private, and independent sectors are funded by means of capital supplied by tax dollars, private investment, and philanthropy, respectively.

There is constant movement within, among, and between the sectors, the community, and the community characteristics. A change in one component of the community circle creates a change in the others. This would occur whether the change began within the core of the community's characteristics moving outward or within the financial sectors that support the community moving inward.

Figure 1
Community circle



Methodology

Research for this study utilized a post-positivist qualitative method. Work conducted in this way transforms the world into a series of representations in the forms of interviews, conversations, field notes, photographs, recording, and memos to the self from which the researcher seeks a better understanding of that being studied (Denzin & Lincoln, 2000).

The research design was built around donors within the Appalachian Ohio region. These donors were individuals, male or female, whose giving fit within the definition of philanthropy. The place of residence may or may not be Appalachian Ohio but there had to be a direct relationship to the region as well as direct giving to or through a community foundation in Appalachian Ohio.

The research employed a purposeful sample, the goal of which is to “select information-rich cases whose study will illuminate the questions under study” (Patton, 1990, p. 169). The particular strategy utilized was critical case sampling. In this strategy, cases (donors and community foundation professionals) were selected for their expected ability to “make a point quite dramatically or are, for some reason, particularly important in the scheme of things” (p. 174).

The sample selection began with community foundation professionals within the region. The Ohio Grantmakers Forum provided a list of 16 known community foundations serving Appalachian Ohio. The researchers chose to limit the study to only those foundations that held assets of at least \$1 million. Nine community foundations in the region met the criteria for inclusion. Of these, seven participated in the study by providing connections with donor-participants.

Community foundation professionals were asked to select a donor(s) whose gifts were philanthropic in nature. The identified donors were contacted by the professionals and, if there was interest in the study, the professional requested permission to provide their contact information to the researchers who would then follow-up, describe the research and donors’ role in more detail, and establish a date for the interview.

A series of seven interviews was conducted with 10 philanthropic donors. The interview format was structured/unstructured. Interview questions were derived from the literature as well as work experience in the field.

After completion of the initial interviews, participants received a transcription of their individual interviews. This phase of the research was one of the study’s examples of a member check. Participants had the opportunity to ascertain that their thoughts were correctly captured, and if not, provide clarification.

After the clarification of the donor interview transcripts, a summary of the emerging themes was generated using NUD*IST software and hand coding. This summary, along with the individual’s own edited transcript, was sent to each participant for reading and reflection. Each donor was contacted to ascertain reactions, determine what findings were surprising, and obtain initial thoughts on how this information may affect future giving.

Findings

For the purposes of this writing, the findings focus on donors. The research revealed three primary areas of interest surrounding donors and their philanthropic giving – influences, connectedness, and gifts.

Two distinct experiences emerged as having influenced donor participants and their giving. The first was family. Donor participants learned the value of giving through the example set by parents and grandparents. Of those interviewed, 80% specifically talked about family and the role family played in developing and encouraging their acts of giving. Acts of giving and volunteering by the parents were critical to this influence.

The role of family as an influence on donors was not a surprise. Fisher (1999) noted that connection to family was a key characteristic of Appalachian people. In addition, family is a key piece in the network of informal and social support within the region (Greenlee, 1993; Anft, 2003). Finally, most people have heard the saying “Charity begins at home.” These three points provided the basis for linking the giving habits of today’s donors with a learned experience from their earliest days in the home and family.

The influence of family and others matched recent research of Giving USA 2004, a publication of the Giving USA Foundation. The research noted two key incentives, or clues, to a person are giving: the example of others’ philanthropy is likely to encourage people to give and a child of donor parents is more likely to be a donor than is a child of non-donor parents. This conclusion supports earlier works of Ebeling (1994) who noted that parents influence their children by way of example, association, and experience and Eberly (1998) who concluded that the role of families, and particularly parents, was critical in cultivating and transmitting the habits of the heart to their children.

Religion emerged as the second experience influencing giving. While the depth of impact of faith varied from the simple act of putting coins in the collection plate as a child to the firm, adult conviction that giving was a means of giving for God’s purposes, religion was a part of the giving influence for 60% of the donor participants. This was a smaller than expected percentage for two reasons. First, religion and religious affiliated organizations are the single largest recipient of gifts, receiving an estimated \$86.4 billion or 35.9% of total 2003 contributions (Giving USA 2004). Second, in Appalachian Ohio, religious ties are very strong. The church is a key piece of the network of informal and social support within the region (Greenlee, 1993; Anft, 2003).

Donor participants very much feel they are part of something larger than themselves. They were connected not only by family and religion but also to the community. All expressed a strong sense of community and acted upon that by being involved in various organizations and activities. Their giving was one means of helping to enhance the place in which they lived, gained business

success and enjoyed the goodness of others. Giving back was a means of creating and maintaining a sustaining community. The focus on the community also moves the giving toward the goal of giving for the common good, an identified characteristic of philanthropy (Bremner, 1994).

The references to sustaining community and an obligation to give back to the community relate directly to the work of Hyde (1983) and two of the four characteristics of property: connectivity and debt. Gifts hold a bonding power, which either precedes the gift or is created by the donation. The donor participants do have a bond with their community. In the examples examined, the connection appears to have existed prior to the gift. In fact, it is the connection of family, business, and goodness of others that influenced the decision to make a gift.

The property characteristic of debt relates to the movement of a gift, which creates a state of obligation (Hyde, 1983). Again, these donor participants felt a sense of obligation to their respective communities; a need to keep the money moving as well as continuing to support the community that had nurtured their families and sustained their businesses.

A means of supporting the fabric of the community manifested in the desire to invest in local economic infrastructure via giving, which equates with the works of Mittenthal (1999) and Pifer (1987). By providing the opportunity for business to flourish, employees to grow, and to encourage innovative opportunities to integrate the latest in technology into the community, the philanthropic dollars are seeking to combat the root cause of societal problems such as unemployment, under-employment, and brain drain.

Involvement was another means by which donor participants are connected, as shown through their volunteerism and board service. Since donor participants' actively participated in organizations and activities related to their interests, gifts became a logical extension of that involvement.

Donor participants also emphasized the use of stories as a means of enhancing community connectedness and sharing the power of philanthropy. Stories of donor participants' giving shared one-on-one became a wonderful incentive for others to give. This agreed not only with the findings in Giving USA 2004 but also with that of Boorstin (1987): "When philanthropy ceases to be a matter only between a man and his God, the community enters, then anonymity loses much of its blessedness. For the community has a right to know, and can profit from knowing. Although Julius Rosenwald again and again refused his permission to let institutions be named after him...and repeatedly refused incidental honors like

honorary degrees, he was opposed to anonymous giving. Simply because he believed that one of the purposes of giving was to stimulate others to give, Rosenwald believed that secrecy and inactivity were likely to go together and to explain each other” (pp. 207-8).

The utilization of the media was another suggested way of sharing stories. Local newspapers and radio are quite influential in rural areas. By taking the lead and sharing positive, pro-active stories on philanthropy and philanthropic donors, these outlets could have a large impact on giving within the region.

Each illustration of connectedness – community, involvement, and stories – ties to the social characteristic of communities as described by Swanson, Cohen, and Swanson (1979). Within the social realm, one finds groups and organizations, shared values, and human relationships. As emphasized by the donor participants, their communities are created and sustained through relationships, religious affiliations, involvement in groups and organizations, and use of stories to share the value of philanthropy

This connectedness also matches the role of association in community (Morgan, 1942). Donor participants illustrated through their experiences and stories how people come together to form relationships, work together and share an identity. Perhaps more importantly, they truly exemplify the notion of a community being a place where people care for one another (Neidert, 1999).

Finally, this connectedness also illustrates why donor participants give to the community foundations in Appalachian Ohio. This is home. Philanthropic giving is one way in which they create a sustaining community, meet local needs, and provide for those that are coming up after them.

When it comes to donors and their gifts, three components of the giving process emerged: (a) the ask, (b) the giving decision, and (c) the thank you. Each has a distinct role within the giving process yet each is tied to the other, forming a circuit. The ask leads to the decision of whether or not to give. If a gift is made, the need for acknowledgement or thanks is created. The act of saying thank you then sets the stage for the next ask.

The ask is the most important step of the gift-seeking process. Some describe it as an art form; others called it annoying. All donor participants agreed it is necessary. Key to a good ask is the person who approaches the potential donor with a gift request. There should be an existing relationship between the two

parties. The ask should be personal with an understanding of the donor's interests, ability, and past involvement.

When considering a gift request, donor participants are thoughtful, logical, and analytical. Philanthropic giving must be part of their personal mission, helping them to accomplish goals within the community and to do things they are unable or unwilling to do themselves. Giving is a means of investing in the community by way of philanthropic assets. Donor participants seek to maximize their dollars and create impact. Donors' testimony agreed with the established definition of philanthropy, which stated that philanthropy is rational giving (Hewa, 1997).

When making a giving decision, taxes are neither the motivator nor the primary influence. Rather, the advantages created by the tax structure are a benefit gained by the act of giving. Minton (2005) noted that "taxes do not motivate people to give; gifts flow primarily out of relationships."

Surprisingly absent in the consideration process was the mention and/or use of professional advisors. The donor participants from this study specifically noted that the decision to make a gift is theirs. Professional advisors' role is to help the donors find the right way to make it happen.

The last step in the donor's giving process is the thank you. All donor participants emphasized the power and importance of the thank you. A thank you need not be elaborate; rather a simple, hand written note will suffice. What is important, though, is the act of expressing thanks. The lack of a thank you usually means the end of giving to the recipient organization by that donor. Considering that past giving is the best indicator of future giving to the same cause (Mount, 1996), it is imperative that the thank you be given attention. In addition, a publication of the Council on Foundations (2005) that highlighted a multitude of works on donor motivation did not indicate any reference to the power of the thank you. Research on the power of the thank you appears to be absent in the philanthropy field and is one that certainly needs examined.

Conclusions

Based on the literature review, experiences within the field and the region and the findings related to the research, several conclusions emerged from the research. First, philanthropic donors are ordinary people. While philanthropy has an image of being the elite, when it comes to community foundations, the likely donor is the person next door. In addition, donors have strong ties to their families, faith, and communities.

Involvement is an important avenue to a gift. Donors were very involved in organizations and activities within their communities. Giving of time is a pathway to sharing of treasure.

Sharing is an important activity related to encouraging philanthropic giving. Stories of giving and the impact of the gift is a means of connecting the community to the power of philanthropy. These may be shared one-on-one, either informally or at convening of donors and potential donors, or through the various media, particularly regional newspapers and radio.

A personal ask by the right person at the right time and in the right way is the most important part of the gift seeking process. Philanthropic donors are also very thoughtful and careful in their giving. In fact, philanthropic gifts are often thought of as investments – investments in community. Gifts must help the donor meet an interest or fulfill a task that the donor is unable or unwilling to do personally.

The power of the thank you cannot be overstated. Thank you not only completes one giving cycle but also establishes the beginning of the next cycle.

Finally, professional advisors are not the initial route to donors. Philanthropic donors look to the needs of the community, what fits their interest, and consider how they can be helpful. Professional advisors are a secondary step, a conduit to finding a means to meet the donors' wishes.

Implications for Leaders

As community leaders there is a responsibility to picture what can be, and assist others in seeing and creating this preferred future. Along with this is an implied responsibility to envision how this might be accomplished and with what resources. In addition, as a community leader and steward you are entrusted with community assets, which must not only be wisely used in the present but also captured, preserved, and enhanced for the future benefit of the community. This is the jumping off point for understanding why philanthropy is of importance.

Philanthropic gifts typically are generated from assets and resources that an individual has accumulated. An easily identifiable example of a source of these assets is small business owners and professionals – local people who have built local and regional businesses that have generated modest wealth. As these small businesses are sold or liquidated, what becomes of the remaining assets, particularly as the owner begins to think about estate and financial planning?

Unfortunately, what is happening all-too-often, particularly in small and/or rural communities, is that these non-recurring assets leave the area, due to a lack of philanthropic knowledge or philanthropic infrastructure.

These escaping assets represent the needed investment and financial capacity for the continual renewal of our communities. Philanthropic assets are the capital for carrying out the work of associations, organizations, and agencies that support the very fabric of our communities. David Mathews (1995), president of the Kettering Foundation in Dayton, Ohio, stated the case for philanthropic assets: “If economic development requires a physical infrastructure of water mains and power lines so that factories, schools, and houses can be built, then community development requires a corresponding civil infrastructure for institutions to work, programs to function, and problems to be solved. Foundations depend on strong civil societies for their objectives to be met. If societies are weak, grant makers must invest in civil infrastructure (pp. 42-43).

Therefore, one of the roles in the job description of community leader should be that of encouraging the community to invest in itself; of encouraging individuals to seriously consider philanthropic giving and the entrustment of their assets to community foundations or other grantmaking entities in order to develop and maintain a strong civil infrastructure.

Recommendations

As community leaders and stewards of community resources and assets, there are action steps you can take to encourage philanthropic giving. Several are discussed here and are presented in no particular order of importance.

First, learn about philanthropy. Be able to distinguish philanthropic and charitable giving. Understand that each has a vital role to play in a community. Learn about the need for philanthropic capital to support a civil infrastructure. Become familiar with community foundations and their roles as the trustee for assets designated for common good. The more you know about philanthropy the more likely you are to interest others in philanthropy.

A second step you can take as a community leader is to invite people to participate. This is critical in that donors tend to be participants. One donor shared an awareness of several people of means who are not giving in the donor’s particular community because the individuals have not been asked to participate. When people participate, they become aware of the needs and opportunities. Inviting people to participate creates an avenue for you, as a community leader, to

develop potentially two key assets in your community: increased human resources and new philanthropic resources.

Tell the story! All communities have stories of gifts and the impact these had on individuals, organizations, and the community as a whole. Encourage donors, as well as gift recipients and particularly community foundations to share the stories surrounding their gifts. Work with local media to highlight donors, the satisfaction received from giving, and the impact of gifts upon community and economic development. As stated by Bobby Moser, Vice President for Agricultural Administration and Dean of the College of Food, Agricultural, and Environmental Science at Ohio State University, “There’s a story behind every gift.” Such stories are often the means of providing the model that potential donors can emulate.

Encourage the community to say thank you. This fourth action step is critical. The power of a thank you cannot be overstated. A thank you not only completes one giving cycle, but also creates the beginning for future giving. In addition to working with local media to tell the story, encourage the media to set the example by publicly saying thank you. One community that does this well is Tuscarawas County, Ohio, where the newspaper in general, and the editor specifically, make a concerted effort to thank donors as well as the community as a whole for its generosity. A donor from that community noted that this thank you from the media not only acknowledges good works but also creates the expectation that giving is a responsibility of community residents.

Philanthropy is an investment in the community’s future. Strategic giving seeks to address the root causes of suffering and affects the common good. As community leaders and stewards of community resources, you have a responsibility to see that potential philanthropic assets are captured, preserved, and enhanced. You can have a positive impact on encouraging philanthropy and increasing community capacity by focusing on four action steps.

- Learn about philanthropy
- Invite people to participate in the community
- Tell the story
- Encourage the community to say thank you

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Biography

Christine W. Cugliari is assistant professor of nonprofit management in the graduate program at High Point University, High Point, North Carolina. Prior to her appointment, Dr. Cugliari was the Program Manager for the Schooler Family Foundation in Coshocton, Ohio. She served 8 years on the Coshocton City Schools Board of Education where she completed terms as vice president and president. In addition, she served 2 years on the Coshocton County Joint Vocational School Board of Education. Other community involvement has included: Appalachian Ohio Giving - management team; Foundation for Appalachian Ohio - steering committee and board of trustees; Tobacco Foundation regional and state grant review committees; and past board member Coshocton Foundation, United Way of Coshocton County and Ohio Association for Community Leadership. Dr. Cugliari received a BA in Economics and Business from Marietta College and an MBA in Executive Management from Ashland University. She earned a Ph. D. from The Ohio State University where her area of research centered on philanthropy in Appalachian Ohio. While at OSU, Dr. Cugliari worked in the OSU Leadership Center as a Schooler Family Foundation partner. Her primary duties focused on working as an intermediary between Appalachian Ohio Grantmakers and Extension as the two groups worked on a joint initiative to raise awareness of philanthropy and increase endowed assets in the Appalachian Ohio region. Dr. Cugliari and her husband Frank Cugliari reside in Coshocton. Their family includes three adult daughters, son-in-law, and two standard Schnauzers.

Dr. Garee W. Earnest is a nationally renowned and highly requested trainer, facilitator, and consultant. Drawing on his more than 25 years of experience, he delivers high-energy, content-driven, experiential workshops that enhance personal, professional, and organizational development. Garee's unique approach for connecting with people includes a blend of humor, creative teaching techniques, and practical applications. Using his certifications in Myers-Briggs Type Indicator® and BarOn Emotional Quotient Inventory (EQ-i)®, and his training in leadership and management, Garee provides customized consulting, training, and facilitation to local, state, national, and international organizations. Since July 1, 2007, Dr. Earnest serves as Leader, Extension Human Resources for Ohio State University Extension. He previously provided programmatic leadership for the Ohio State University Leadership Center and holds the rank of Associate Professor. He received his Ph.D. in Extension Education from The Ohio State University, and his master's and bachelor's degrees in Agricultural Education from West Virginia University. Recognition of his commitment to serving others includes the Excellence in Extension Award, the James D. Utzinger

Extension Teaching Award and the Outstanding Service to Students Award at Ohio State, as well as the Association of Leadership Educators' Distinguished Leadership and Service Award, and the Best Paper Award in the Organizational Behavior Track at the Third Biennial International Conference on Advances in Management on the national level. His professional memberships include the Association of Leadership Educators, the International Leadership Association, the Association for Psychological Type, the International Association of Facilitators, Epsilon Sigma Phi, and the Ohio Extension Professionals Association. A native of West Virginia, Garee and his wife, Bonnie, live on their nine-acre farm, Mystic Meadows, where they are raising and showing Percheron draft horses.