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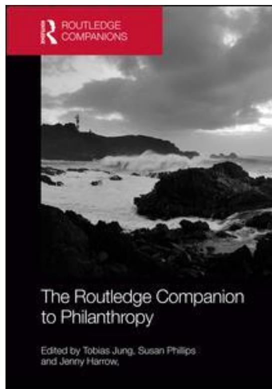

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Concluding thoughts

The 'Ubers' of philanthropy and future disruptions

Susan D. Phillips and Tobias Jung

A sector that had few incentives to innovate, the taxi industry, was transformed in a remarkably short period by the smartphone car-service app Uber; this was done across the 58 countries in which Uber currently operates without owning a car or employing a cab driver. As an example, not an endorsement, of one of many agents producing change in disruptive, rather than incremental ways, Uber offers both metaphorical and practical insights for philanthropy in navigating an increasingly open, collaborative, data-driven economy. It also points to the advantages of being a first mover, while being strategic about potential backlashes from entrenched interests, and to the challenges for public policy in keeping pace with contemporary disruptions.

The Uber advantage for passengers is the ability to get a car, with choice of basic or luxury models, where, and when, needed, (usually) at a cheaper price than a regular taxi, with payment directly billed to a credit card and no tipping expected; drivers use an asset they already own, without expensive licensing, set their own hours, and make more money by driving to meet demand. Transparency, self-regulation and learning are built in: riders instantly rate their drivers, but drivers also rate their passengers, promoting a sense of accountability and safety for both. More than rides, Uber's product is data: by keeping a GPS record of every ride, driver and passenger, it knows patterns of demand and performance in a way that most taxi companies do not (Badger, 2014). It has also recognized opportunities that are closely related to taxi services, including delivering lunches and transporting puppies for playtime with downtown office workers, partnering with dog rescue nonprofits to raise awareness of shelter animals available for adoption. The ripple effects have been far reaching. Reportedly, they are changing patterns of car ownership, nightlife and locations of urban living (Ryzik, 2014). Not surprisingly, the owners of taxi medallions and licenses – rightly fearing the loss of value of these tightly regulated commodities – have vigorously resisted the entry of ridesharing operations. The response by governments has been described as 'whack-a-mole' (Johal and Zon, 2015) since these new players do not fit the old taxi rulebooks. Is Uber really a software company as it claims, or an unlicensed taxi business? Following demonstrations by taxi drivers on Paris streets, France banned Uber; so, too, have Germany, Thailand and many cities; some mounted sting operations to fine drivers, or imposed new rules on response times to make the service less convenient; others have tried to find means of coexistence between ridesharing and traditional taxis. For its part, Uber has been very selective in where, and how, it enters a new market, paying close attention to the 'unique

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topology of each new market' (Brown, 2013: NP) with place-centric launches, and favouring cities where its reception may be less hostile.

Our point in comparing ridesharing to philanthropy is not to glorify 'disruptive innovation' (Bower and Christensen, 1995) as an end in itself, but to offer five parallels to the changing dynamics of philanthropy as new tools, practices and organizations create different spaces alongside the continuing prominence of strategic, entrepreneurial, outcome- and investment-oriented approaches.

Attention to end users *and* suppliers

A key feature of the collaborative economy, embraced by Uber and other sharing platforms like Airbnb, is that they blend public and private – personal cars become 'taxis' and spare rooms double as 'hotel' rooms (Badger, 2014) – but do so in a manner that is built around the needs of customers while creating the right incentives for providers. So, too, must philanthropy. The rise of social media, cheaper communication, and the ability to reach episodic donors through crowdfunding, pushes philanthropy to redefine what a 'donor' is and the nature of their involvement. Ultimately, this forces greater transparency and accountability. Technology is already making payment systems frictionless, but this is only a small piece of the customization challenge. The entire philanthropic experience, including alignment with the right causes, the ease of conducting due diligence and ability to engage with organizations in different capacities, needs to be tailored more specifically and quite differently to different populations. In particular, young donors are reinventing philanthropy: they demonstrate the potential to get involved in new ways and on a global scale, for example through online viral campaigns and peer-peer microfinancing; hold a strong affinity for entrepreneurship; and seek to be engaged through meaningful action and in leadership capacities in addition to their financial contributions (Achieve, 2014). Most nonprofits, however, fail to adequately capture this; they still have an over reliance on traditional methods of attracting donors. Research agendas that provide much finer grained data about motivations, giving and engagement patterns so as to capture differentiations among population groups will be required, as well as better information about the use of the broad range of philanthropic tools that are now available.

Uber has also taught us to pay careful attention to the supply side, which for philanthropy involves not only individual and institutional donors, but a wide range of intermediaries. These include professional philanthropic advisors, fundraisers and gift planners, the institutions that manage Donor Advised Funds (DAFs) and impact investments, United Ways and federated funds, charity rating agencies, social exchange markets, the media that can so readily shape how different organizations and causes are perceived, and the nonprofits and charities through which philanthropy passes en route to public purposes. These intermediaries are taking on increased significance, serving as new instruments and asset classes, brokers, rating bodies, and learning systems. However, little is known about most of them. In the absence of evidence-based research, debates about the role of these intermediaries are waged primarily between entrenched, often polarized positions, as demonstrated by current discussions of DAFs. For proponents, these personal giving vehicles, often described as the poor donor's foundation, democratize philanthropy, encourage giving and disperse funds at a faster rate than private foundations (Cohen, 2014); their detractors argue that DAFs, particularly those held by corporate-affiliated gift funds, lack transparency, create an information buffer between nonprofits and donors, and divert funding from charities by sitting on contributions for indefinite periods, leading to calls for mandatory payout rates (Cantor, 2014; Madoff, 2014). As part of a broader debate about the value of perpetuity to philanthropy, DAFs merit much greater scrutiny, as do other intermediaries. Who are they

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serving and how well are they doing so? Indeed, questions of accountability – who is (or should be) accountable to whom and for what – have acquired a new saliency and become much more complicated in the collaborative economy.

Transparency, accountability and learning

A basic premise of why people trust nonprofits is information asymmetry: the 'contract failure' theory posits that when consumers have difficulty attaining full information about quality of services, they are more likely to trust nonprofits than providers with a profit motive (Hansmann, 1980). The transparency afforded by open, big data is rapidly reducing information asymmetries between service providers and consumers, and among donors, recipients and the public. The collaborative economy has become the *reputation* economy in which, as Unwin (2014: 22) notes, 'organisations will be judged by their connections as much as by their balance sheets, and will need to demonstrate they are open, and accountable, in the more complex, and more rewarding world.' Although this should create incentives to voluntarily be more forthcoming with information of all types, the philanthropic and nonprofit sector has not fully embraced such openness. Foundations are still seen to operate in 'stealth mode' (Camarena, 2013) and the financing and governance of many charities seems 'unfathomable' (Unwin, 2014: 21) to potential donors and the public. Competition for funding, and fear of losing funding if results are not as expected, has generally discouraged nonprofits from sharing information about innovations with each other and from reporting on their failures, as well as their successes.

With a lack of information about impact and results, the public, aided by third party rating agencies, has focused on inputs as a means of assessing effectiveness, particularly the wildly popular, but deeply misleading, notion that low ratios of administrative and fundraising costs are good measures of well-run organizations (Palotta, 2012). Technology and big, open, data are rapidly changing what is possible and expected (Bernholz, Chapter 28), enabling a variety of startups as well as established organizations to provide detailed assessments of the financing landscape, make 'grantmakers' data more useful' (Ajah, ND) and enable potential donors to make more informed decisions based on relevant information. The disruptive next step will be the use of this expanded transparency for purposes of learning and accountability.

The current learning systems for philanthropy fall short of their potential (Johnson and Remmer, 2008; US Trust, 2013), or at least research on them is so inadequate that their effectiveness cannot be assessed. With the importance of High Net Worth (HNW) individuals, impending intergenerational wealth transfers, and the creation of new pockets of wealth, the professional advisors to philanthropists are assuming more significant roles. Their ability to engage the values-based philanthropic conversations that extend beyond the mechanics of giving is reportedly improving, but still not fully serving their clients' learning needs and desires to involve the next generation (TPI, 2000; Scorpio Partnership 2008). The popularity of DAFs has compounded the challenges of advice seeking and giving. When DAFs are held by community foundations, the donors may benefit from extensive advice by the foundation staff, particularly for locally-based giving, and many community foundations are very actively marketing this advantage. In contrast, the money managers at corporate-affiliated gift funds are unlikely to endorse specific causes or charities, referring clients to standard third party sources and rating agencies (Nonprofit Quarterly, 2010), while recognizing that many donors do not seek or desire advice.

A distinctive feature of the collaborative economy is learning based on peer-to-peer networks and self-regulation, and attuned to end users. Peer-based learning is already occurring to some extent through a wide range of giving circles and networks of philanthropists or angel

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investors. Often these are informal and have an important social, as well as educational function (Eikenberry and Bearman, 2014). Some, such as Social Venture Partners (an affiliation of individuals who mentor each other about becoming better educated philanthropists while assisting community organizations to have more impactful projects), have become international in scale. As a formalized peer-to-peer system, more effective self-regulation has been advocated by several contributors to this volume (Phillips and Smith, Chapter 13; Breen, Chapter 14; Sidel, Chapter 16) as a mechanism for promoting accountability for purposes of learning in ways that rule-based state regulation does not.

Philanthropy has been widely criticized for its poor skills at listening to its 'customers' – specifically, its beneficiaries and its third sector intermediaries – and for neglecting to use such knowledge to improve performance (Shoemaker, 2015). The modus operandi of strategic philanthropy is a top-down approach led by a theory of change crafted by the donor (Anheier *et al.*, 2007; Brest *et al.*, 2015). This normalizes control by the funder, rather than promoting an injection of bottom-up perspectives that offer experiential knowledge to fit proposed solutions to user realities. As described in Part III of this volume, various communities, rather than waiting for philanthropic institutions to become more user sensitive, are mobilizing and experimenting with a wide range of 'horizontal,' community-led, initiatives. The private sector, which has been quicker to develop a user focus, is also filling some of this space, particularly in developing countries where it is working with those at the 'bottom of the pyramid', people living on $5 per day or less (Prahalad, 2004). Seeing this large segment of the population as both consumers and producers in a global market, and thus as a resource and opportunity rather than as a 'problem' for philanthropy to fix, many businesses are aggressively and controversially developing low cost services and making use of philanthropic tools, such as microfinance, to invest in these communities (Salamon, 2014: 56). Philanthropy's challenge, then, is to better integrate top-led and community-driven approaches, and in the process rework the power relationships that have discouraged two-way learning. This entails engaging and listening more actively to the recipient nonprofits, investing in their capacity to engage with, and learn from, the end users, and for donors to personally 'dig in' (Shoemaker, 2015) with the communities they are trying to assist, co-producing projects and programs in culturally competent ways. The point of such engagement is more than process, but is squarely focused on achieving impacts for improving lives and environments.

Investing in impact

The ability to have impact – to make a difference in people's lives – has become the new goalpost for philanthropy, replacing mere intentions of doing good (Harrow and Jung, 2015). If the search for impact is to remain credible, however, evidence of achievements is critical. The measurement of impact is unquestionably difficult, often requiring long-term horizons and plagued by issues of attribution (Edwards, 2014). Impact measurement has advanced in recent years, but has often gotten stuck on single indices such as Social Return on Investment (SROI); it is far from having solid indicators of blended or triple line investments (Trelstad, 2014). While stressing the importance of impact in their resource allocations (Brest, 2012; Bagwell *et al.*, 2013) philanthropic institutions and other funders have not assisted the development of better measurement to the extent they might. Many do not fund or provide technical assistance for performance assessment (Hall *et al.*, 2004; Kail *et al.*, 2013); they expect assessment over unreasonably short time periods (Edwards, 2014); and have a built in bias for measurement of the effects of services, rather than of infrastructure or advocacy (Salamon, 2014).

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That philanthropy is underperforming on its impact agenda is, however, not solely due to the challenges of measurement. Adherence to an 'illusion of control' (Shoemaker, 2015: 7) is a major inhibiting factor. Affecting real change, particularly in difficult or complex environments, is a long-term proposition, but donors are reluctant to commit to long term funding horizons: they do not want the recipients to become dependent on them or they seek the flexibility to move on to new projects. Funding is increasingly of a restricted nature (Blackbaud, 2005), tied to a particular use or performance target, in order to adhere to a funder's strategy or an advisor's caution to sign only a very detailed gift agreement. As a result, the ability of recipients to be agile and adaptive as conditions change, or as they learn how to deliver more effectively, is impaired. Donors' reluctance to support organizational capacity building or advocacy also inhibits opportunities to scale up or to influence public policies that affect outcomes. In spite of the rhetoric around innovation, approaches to risk are cautious, and rarely are funds designated specifically for experimentation (Bagley, 2014). The public gives low ratings to how well nonprofits report on impact and, more generally, on how donations are used (Lasby and Barr, 2013; Wixley and Noble, 2014). In particular, acceptance of, and candour about, failure is still limited (Bishop and Green, 2014). While 'failure reports' are being advocated as a means of learning from things that do not work (Lomax and Wharton 2014; EVPA, 2015), thereby reinforcing the notion that some failures are an accepted part of risk taking and discouraging only positive reporting (DP Evaluation 2012; Shell Foundation, 2015), they are still a novelty and need to avoid becoming pro-forma rather than meaningful. A question remains of what difference better reporting alone would make because, in spite of the importance donors say they ascribe to impact, it appears to make little difference in their philanthropic decision-making (Cunningham and Ricks, 2004; Lasby and Barr, 2013). Relationships, reputation of recipients, being asked, warm glows, and a host of other factors still come into play, tempering or overriding any carefully calculated assessment of impact.

Finally, the drive toward impact tends to be a series of isolated journeys, with different philanthropists and institutions pursuing their own paths. Although the notion of working collaboratively for 'collective impact' – developing and acting on a shared agenda for solving specific problems – has become popular, if in some versions formulaic (Kania and Kramer, 2011), this admonishment is applied mainly to nonprofits, with individual and institutional philanthropists still tending to act alone.

While incremental progress toward better measurement and its use is likely to occur, larger scale disruption will come as impact goes 'retail'. Impact investing has become a major global asset class, promoted by international fund management firms, and has made the dimensions of risk, return, and impact the new standard of social investment. Nonprofits, large and small in all parts of the world, will need to show they have worthy projects in which to invest which creates pressures for standardized indicators (Thümler, Chapter 23). As Salamon (2014: 15) pointedly observes, rather than standardized (or necessarily sound) approaches, a plethora of impact measures has been created to support this market, and are 'so numerous that they begin to resemble those prizes in grade-school contests designed to ensure that every child comes home a winner'. In addition, the strong endorsement by many governments of social impact bonds, rooted in pay for success arrangements in which investors realize a return only if the nonprofits delivering the service meet assigned performance targets (Clifford and Jung, 2016), is making impact increasingly competitive. It puts new pressures on third sector organizations to be able to deliver. When combined with the integration of services and anticipation of collective impact, this then becomes very complex, and likely political in both a small 'p' and partisan sense. Academic research is just scratching the surface of this new world of impact investment and its politics, but will be vital to its future.

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Engagement and collaboration

The collaborative economy by which consumers create, share and crowdsource goods and services, rather than purchasing them from traditional organizations, has opened unknown territory – not only for how we consume, but the expectations of engagement and collaboration that surround it. For individual philanthropists, a new meshing of giving with engagement is evident. Although volunteerism and donating have long been correlated – those who volunteer are more likely to give (Pharoah, Chapter 4) – they are increasingly being combined as part of a 'values-exchange' in which donors seek out, and participate in meaningful ways in, organizations that share their values (Rabin, 2014). This is particularly so for Millennials, women (TD Bank, 2014) and HNW donors who are all interested in using their heads by giving their distinctive talent in a leadership capacity, not just using their hands in conventional service roles. Instead of traditional fundraising, organizations thus need to be more attuned to 'resource raising' (Wilding, 2014: 28), managing and matching diverse kinds of talent.

At the organizational level, philanthropy has tended to be a solo, fragmented, competitive, and image-driven enterprise. Foundations hold financial and decision-making power over their grantees and protect their distinctive brands and reputations very carefully, rather like Uber itself which has been famously aggressive in poaching drivers. In an environment of scarce resources, successful nonprofits have also learned to excel at competition. Led by the rising influence of Millennials, a wide range of community-based experiments and individual philanthropists who have lost patience with unproductive competition, the future will increasingly demand greater collaboration among nonprofits, among philanthropic institutions and across sectors, as is already beginning to occur. Major foundations have demonstrated a willingness to work together on complex issues; regionally-based and cause-oriented (e.g. around environment or the arts) networks of grantmakers or investors have formed in many countries (e.g. the European Venture Philanthropy Association). The sustainability of many of these collaborations has been quite fragile, however, due to difficulties in maintaining the commitments, overcoming differences in organizational cultures, and matching institutional interests with those of their partners (Eikenberry and Bearman, 2014). In this regard, they have been fashioned as old-style power relationships among like kinds of organizations. A new type of collaboration percolating through the sharing economy reflects a 'new power' that, rather than being controlled by the few, is 'open, participatory, and peer-driven' (Heimans and Timms, 2014), involving a greater diversity of participants, each providing different kinds of resources. Radical transparency with a purpose of learning for improvement is a defining feature. Instead of emanating from formal evaluations, such learning comes from participation and peer-based sharing, giving participants a sense of agency and power (Heimans and Timms, 2014). The challenge will be to develop appropriate models of networked governance and horizontal accountability (to 'partners' rather than funders), suitable to a new power and empowerment (Jung and Harrow, 2015).

The corporate sector can be expected to be a major player in various types of partnerships and cross-sectoral collaborations, but less so in handing out cash than in providing skills, networks, infrastructure and other assets related to projects that advance firms' core business (Wilding 2014). In the field of human services, corporations are becoming leading players in pressing for intersectoral collaboration to fundamentally redesign, coordinate and integrate public services, many of which they already co-produce (KPMG, 2013), as a means to more stable and user-centred systems. In the absence of a strong evidence-base, the third sector has rightly tended to be deeply suspicious of such corporate partnerships, questioning the mutual benefit they generate and pointing to the uncertainty and risks they may entail. There is likely to be a growing divide among nonprofits: those willing to engage and exert their own 'new power' in these

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relationships on the one hand, and those who see such collaboration as greater marketization of philanthropy on the other. With heightened accountability, both within organizations and to a wide range of external stakeholders, with complex issues at play, and a problematic history of business engagement in other areas, such as the public sector, the challenges of making such cross-sector collaboration work should not be underestimated.

Place sensitive and policy relevant

A large part of what is seen to be exciting about contemporary philanthropy is its increased diversity that arises from an expanded range of tools for social investing, the invention of new forms of hybrid organizations and a 'big bang' of new actors (Salamon, 2014: 37). Place needs to be added to this list as a source of increased differentiation. As Uber recognized, what works in some places does not in others. The rapid growth of community foundations, which have doubled their numbers in the past 14 years to more than 1,800 and extended their reach globally (Knight, 2014), is the primary manifestation of greater place-sensitivity, and is changing the course of philanthropy in several ways. Community foundations are affecting the distribution of philanthropy in that, compared to individual giving, a very small percentage of their grantmaking goes to religion, with the bulk directed at education, human services, and arts and culture (Knight, 2014: 8). They are reporting success at catalyzing giving, sometimes through reviving traditional forms as Egypt's Maadi foundation has done with the *waqf*, but also in supporting community networking and innovation (Knight, 2014: 18). What distinguishes community foundations from other philanthropic institutions is that grantmaking is not the only, or necessarily the most important, thing they do: rather they provide the 'architecture for solving social problems' (Knight, 2014: 18) by promoting collaboration, convening conversations, building capacity among community organizations, supporting leadership development, and being knowledge centres (Harrow, Jung and Phillips, Chapter 19). Their success is related to an ability to work in the open, participatory, and context-specific, new power of collaborative economies. The rise of the middle class in the Global South is likely to produce a new spurt of growth (and funding) of community foundations and of other local initiatives directed by local communities. When coupled with greater transborder flows of money, talent and ideas, their diffusion can be expected to reshape more established forms of philanthropy across many countries.

The potential of these new developments will rely upon a receptive and enabling policy and regulatory environment. The ability of public policies and regulation to enhance and shape the instruments of philanthropy is clear: for example, new regulations in the mid- 1990s encouraged commercial banks to invest in community development in the US (Sagawa, 2014); when Canadian tax rules allowed donation of public securities to charities in 2006, revenues jumped dramatically; the creation of the UK's Big Society Capital injected significant capital for innovation; and if a European Foundation Statute were ever enacted, cross-border philanthropy would be greatly facilitated. The Uber analogy reveals how resistant to change public policy can be, particularly when governments try to force new phenomena into old regulatory boxes, rather than creating more flexible, suitable ones. Poorly fitting public policy that is the legacy of an era when the main goal was to oversee administration of tax benefits, and has been left to drift since (Phillips and Smith, Chapter 13), is a major impediment to evolving practices of philanthropy in a transnational environment. In spite of increasing domestic pockets of wealth, many developing countries are caught between motives to contain philanthropy, particularly foreign funding directed at advocacy, and to encourage expansion of private giving (Sidel, Chapter 16).

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At root is the problem that governments know very little about the needs, challenges, and potential of philanthropy, in part because there is rarely an institutionalized access point, comparable to the voice of business in industry departments that makes at least one department (other than a tax agency) responsible and receptive. Thus, the current relationship of governments and the philanthropic and nonprofit sector is at best underperforming (Healy and Donnelly-Cox, Chapter 12). This sector is still treated mainly as an invisible social safety net, assumed to be willing to supplement public spending. At worst, the relationship has become increasingly politicized for partisan purposes that are disconnected from an interest in policies for more effective and accountable philanthropy (Phillips and Smith, 2014). Rather than continuing to drift on outdated assumptions, governments need to animate some serious and extended public conversations about policies for philanthropy and the sectors it serves. The agenda could be a lengthy one. Central items could include: policies for transborder giving, mechanisms of accountability and transparency, tax benefits and their redistributional effects, payout rates on foundations and DAFs, regulations on program-related and impact investing, roles of the new hybrids, and means of promoting social innovation, etc.

Conclusion: Research for a disrupted philanthropy

Philanthropy is undergoing constructive reinvention and redesign, with the extent of its multiplier effects on existing institutions and practices still to be properly assessed. The once inelastic concept of philanthropy has been stretched, aided by an array of new philanthropic tools and intermediaries, into a continuum that ranges from traditional charitable giving to social investment. The strategic, entrepreneurial and impact-oriented philanthropy that was declared new more than a decade ago is likely to remain firmly planted along it. Approaches that are more collaborative, community-oriented and place-based are on the rise, coexisting alongside strategic and venture philanthropy. The creative uses of technology, effects of democratized participation and roles of hybrid, blended-value, organizations are just beginning to take hold. The combined result will be an even more diverse and adaptable philanthropic landscape. Its geographies will shift and its scale will be both more local and more global.

The main challenges will be for public policy and academic research to keep up. Across the spectrum of topics covered in this *Companion*, from philanthropy's impetus through its implementation to its impact, the authors have identified gaps and suggested research agendas. They point to the need for case studies of philanthropy's recent innovations, but also systematic quantitative and comparative research. Extant research has focused mainly on either individual giving or the major institutions paying little attention to the diverse set of philanthropic intermediaries. The black boxes of individual decision-making and of the internal management of philanthropic institutions and network governance need to be opened. A collaborative bent for philanthropy would also value research on philanthropy's facets that we have talked about least in this volume – time and talent rather than treasure, and the interaction of volunteer engagement with giving. Questions of redistribution and impact imply a greater interest in how philanthropy affects its intended beneficiaries.

Two questions that permeate the *Companion* are whether philanthropy needs to 'up its game' in being more effective, and whether it is doing so. The conclusions that are threaded through the various dimensions and expressions of philanthropy in the volume are yes, and yes: there is much to be done to enhance philanthropy's potential, and much that is positive in taking it in this direction. Our intent is that these chapters have provided a variety of ideas as to how research can do the same.

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