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## RESEARCH ARTICLE

# How trust and relationships impact on the giving decisions of philanthropists

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**Abstract**

Numerous studies have sought to understand why philanthropists are not giving more to charity. Two recently published studies identified a lack of faith in charities and an absence of trust as significant barriers to philanthropy. We report on the findings of a qualitative study which sought to examine the extent to which trust, and relationships influence the wealthy to give or withhold funding to charities. We employed in-depth qualitative research methods and semi-structured, conversational-style, interviews as the major form of data collection. We utilised Braun and Clarke's 'reflexive thematic analysis' method of thematic analysis which gave rise to 4 key themes and 9 sub-themes. Findings revealed that trust underpins the relationships that philanthropists have with charities and is an important conduit to forging an ongoing relationship. Trust is frequently relied upon as a proxy for evidence and an absence of trust will usually lead a philanthropist to withhold funding.

**KEYWORDS**

evidence, philanthropy, relationships, trust

**Practitioner Points****What is currently known**

- Charities are struggling with reduced funds amid increasing needs.
- Public trust in charities is heavily informed and influenced by mass communications and the media.

**What this paper adds**

- Provides insight into how nuanced, personal trust affects high-net-worth individuals' (HNWI) giving.
- Establishes a clear link between trust dynamics, donor decision-making, and the underuse of evidence.
- Highlights the predominance of peer endorsements over evidence in philanthropic decisions, leading to potential inefficiencies in charity funding.

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### Implications for practitioners

- **Transparency and accountability:** Charities should prioritise transparency and accountability, particularly in communicating their effectiveness and areas for improvement. This openness fosters trust and can encourage more informed and sustainable giving from donors.
- **Encouraging evidence-based giving:** Philanthropists should be guided to seek out and support evidence-based initiatives, rather than relying solely on peer endorsements. This involves a commitment to understanding what works and what doesn't, and a willingness to support core operational costs to enable charities to function effectively.
- **Hybrid approach to philanthropy:** Donors should be encouraged to adopt a 'hybrid' approach to their philanthropy balancing the emotional and value-driven aspects of giving with a strong emphasis on evidence and impact. This balanced approach can enhance the effectiveness of their philanthropy while maintaining personal engagement and satisfaction.
- **Diversify funding streams:** Address the risk of philanthropy becoming an echo chamber by diversifying funding sources and focusing on inclusivity and the genuine needs of beneficiaries, rather than donor preferences alone.

## 1 | INTRODUCTION

The pandemic put the UK's third sector under unprecedented pressure as charities experienced substantial reductions in income (Mohan, 2022, para 6) in tandem with a surge in need. Post-pandemic, the turbulence continued, as millions of households endured the sharpest rise in the cost of living for 40 years (Boles & Strydom, 2022) exacerbating the demand for charitable support. This situation aggravated a trend of declining funding to the third sector in the UK, which predated the pandemic. Indeed, by 2013/14, government funding for the third sector had contracted to '£2.8 billion' (HL, 2016–2017, p. 41, para 178) and the number of people giving to charities had been decreasing since 2016 (Barry et al., 2022).

Philanthropists across the globe responded swiftly to the onset of the pandemic in 2020, donating circa US\$20.2 billion—of which donations 'by high-net-worth individuals accounted for at least \$5.8 billion' (Sato et al., 2021, p. 5). However, such support was neither universal nor sustained. Indeed, 'barely one in ten of the world's billionaires gave in response to the pandemic during its first few months' (Smith, 2021, para 28). Moreover, giving by UK-based High-Net-Worth-Donors (HNWDs), which increased initially, was not sustained post-pandemic (Macdonald, 2021).

Charities experiencing falling incomes alongside rapidly increasing demand is concerning, hence questions as to why the wealthiest are not giving more and whether they can be supported to give more effectively, are critically important. However, notwithstanding an emergent body of literature researching donor behaviours, few studies have sought to examine the extent to which trust, and relationships influence the decision-making of philanthropists. Most of the extant literature examining trust concentrates on public trust in charities, as influenced by widespread communications and the media, as distinct from the customised trust that informs the giving decisions of HNWI philanthropists. This study seeks to address this gap in the literature by examining a more nuanced facet of trust, one which is informed by bespoke personalised exchanges between the donors,

their peers, and the beneficiary charities. For though the correlation between general trust and charitable giving is well-founded, few studies have explored the extent to which more subtle aspects of trust, including personalised trust dynamics and relationships, influence giving behaviour on the part of philanthropists.

To date, numerous studies have sought to examine the barriers to giving confronting the wealthy. One such study identified a lack of trust as a barrier to the wealthy 'giving more' (Dovey, 2020, p. 18). Several studies concur; for without trust, donors 'worry that their hard-earned money is not being well spent when donated to charities' (Pinkney cited in Benton, 2019, para 7). Indeed, Chapman et al. theorised that trust 'is a prerequisite for charitable giving' (Chapman et al., 2021b, p. 1275). However, whilst trust and philanthropy appear to be correlated, it is not clear whether it is trust that fosters charitable giving, or giving that promotes trust (Chapman et al., 2021b). Nevertheless, there is consensus across the academic literature that trust is important (Bryce, 2016; McKnight & Chervany, 1996); and it is theorised that individuals with a greater level of 'general trust' are more likely to make donations of a higher value than individuals with lower levels of 'general trust' (Farwell et al., 2019; Neumayr & Handy, 2017). Hence, one can hypothesise, that an absence of trust will lead to a decline in donations. Indeed, trust in charities was already declining before the pandemic, evidenced by several high-profile scandals in the sector (Brindle, 2019), leading the Charity Commission to suggest that 'public trust in good causes' was 'being undermined' (Brown, 2020, p. 1). This implies that the perception of trust as intrinsic to the third sector is no longer applicable (Prakash & Gugerty, 2010). Furthermore, the reputational damage caused by one non-profit scandal, could generate spillover effects and so contaminate the sector as a whole (Becker et al., 2020, p. 190). Indeed, a UK survey found that only 48% of respondents agreed that charities were trustworthy (CAF, 2019) suggesting a correlation between declining donations and diminishing trust. Moreover, charities seen to be violating trust were treated more severely by the public than commercial companies (Hornsey et al., 2020). Nevertheless, a global study by

Chapman et al. concluded that ‘scandals within individual organisations have not affected sectoral trust’ (Chapman et al., 2021a, p. 441) and a report examining public trust in charities in the UK, revealed that post-Covid there has been a slight increase in public trust in charities but caveated that ‘the journey to restoring public trust ... remains a gradual one’ (Yonder, 2021, p. 7).

To date, there has been some excellent research examining trust in non-profits. Sargeant and Lee sought to operationalise the meaning of trust in ‘the voluntary sector context’ as it related to ‘donor behaviour’ (Sargeant & Lee, 2001, p. 69) and they also examined the role of trust and relationship commitment in the charity sector (Sargeant & Lee, 2004). Chapman et al. conducted several studies examining the relationship between identity and charity preferences and the role of social networks in charitable giving. Becker et al. utilised a large-scale study to examine the determinants of public trust in non-profits and developed a conceptual framework predicated on ‘the assumption that the public’s trust in non-profit organisations depends on the aggregation of each individual’s trust evaluation as well as organisational and individual trust building determinants’ (Becker et al., 2020, p. 192). Two further studies which examined barriers to giving (Dovey, 2020; Savanta, 2019); identified trust as a key concern for donors.

A recent study examining the barriers to and facilitators of the use of evidence by philanthropists (Greenhalgh & Montgomery, 2024) concluded that few donors employ entirely judicious evidence-based models of philanthropy but rather utilise hybrid models in which they seek out or rely upon, the endorsement of a trusted peer and their instincts before engaging with evidence. However, few studies have sought to understand the extent to which personalised trust serves to support or undermine the use of evidence by philanthropists.

This paper will make a threefold contribution to the extant literature. First, it undertakes an empirical study of the extent to which personalised trust and relationships influence the decisions of philanthropists. Second, it examines the interaction between trust and the utilisation of evidence in influencing philanthropic giving and third it seeks to detect the factors which serve to promote or hamper the fostering of trust between philanthropists and non-profits. Hence this study not only fills a gap in the research but also offers suggestions for practitioners seeking to cultivate more meaningful and effective relationships with donors.

This article reports on the findings of a qualitative study which sought to examine the extent to which trust, and relationships influenced the wealthy to give or withhold funding to charities. We commence by framing trust and why it is important, before describing the methodology employed; our findings are explained in the third section and interpreted in the fourth; we conclude with recommendations for future research.

## 1.1 | What is trust and why is it important?

Trust underpins a donor’s relationship with a charity; in part because that which is produced by charities is frequently intangible

and may be hard to quantify. Consequently, trust in charities is essential for their legitimacy, effectiveness and both financial and non-financial patronage (Bryce, 2016) and plays a key role in the fostering of enduring relationships between charities and donors (Breeze, 2013; Savanta, 2019). Waniak-Michalak and Perica however, caution that public trust is not a critical factor for donations which are also influenced by external and independent components including demographic and economic factors (Waniak-Michalak & Perica, 2021, p. 185).

There are multiple ways in which philosophers frame trust, but a basic tenet is that of reliance or expectation, for to trust someone is to rely on them to behave in a certain kind of way (Goldberg, 2016). Likewise, Frederiksen defined trust as ‘an expectation that, while untoward things could happen, they are not expected to’ (Frederiksen, 2014, p. 168).

### 1.1.1 | Trust

Trust as it pertains to philanthropic contexts is ‘multidimensional’ (Gilfoyle et al., 2022, p. 12), multifaceted and complex, in part because it is built up over time and multiple interactions (Dovey, 2020). Hence how trust is interpreted, and the meanings attributed to trust are contested. The Oxford English Dictionary offers a modern definition of ‘trust’ as a ‘firm belief in the reliability, truth, or ability of someone or something, confidence or faith in a person or thing, or in an attribute of a person or thing’ (Oxford English Dictionary). However, such a definition does not reflect the subtle nature of trust which underpins most philanthropic relationships. Mollering posits that trust requires a ‘leap of faith’ or ‘a suspension of doubt’ (Nooteboom, 2006, p. 1908). Chapman et al (citing Meyer et al 1995 and Rousseau et al 1998) concur that trust requires a ‘willingness to be vulnerable to the actions of others’ (Chapman et al., 2021b, p. 1276).

## 1.2 | How is trust conceptualised?

There is little consensus as to how ‘trust is conceptualised, operationalised and measured’ (Gilfoyle et al., 2022, p. 3); in part, because trust is complex and multifaceted but also because it is ‘context-specific’ and as such ‘must be understood from the perspective of all parties and within its context’ (Gilfoyle et al., 2022, p. 8). Moreover, there is a temporal aspect to trust, in which the relationship between trustee and trustor evolves over time (Jones & Shah, 2015) and so is tempered by ‘long-term expectations’ (Guillou et al., 2021, p. 11).

Gilfoyle et al. characterised ‘integrity’, ‘reliability’ and ‘ability’ as ways in which trust could be conceptualised (Gilfoyle et al., 2022) and Farwell et al. identified institutional trust, accountability, transparency and familiarity as being positively correlated with trust in charities (Farwell et al., 2019).

By critically engaging with all these aspects of trust this study reveals a framework to enhance our understanding of how philanthropy is informed by trust. It finds that trust in philanthropy rises

above mere binary beliefs that someone or something is trustworthy or not. Rather philanthropic trust evolves from and is informed by continuing exchanges, social norms, and individual experiences.

### 1.3 | Relational trust

The construct of trust as it applies to philanthropy, extends beyond being merely transactional, and instead frames trust as 'relational' (Frederiksen, 2014; Gilfoyle et al., 2022) encompassing cognitive, emotional and behavioural elements (Lewis & Weigert, 2012). Frederiksen utilised Pierre Bourdieu's 'relational social theory' to frame 'the relational process of trusting as a merging of individual dispositions to trust and the relationships within which trust unfolds' (Frederiksen, 2014, p. 167). Frederiksen extends this notion further, positing that trust is dynamic, evolving and informed by a confluence of factors indeed, 'trust is practically never a purely dyadic phenomenon between two isolated actors; there is usually always a context and a history...' (Mollering, 2006, p. 9) and as such the trustor will usually have some justification for trusting the trustee (Frederiksen, 2014). Such a framing of trust encourages a more subtle understanding, that is informed by and contingent upon the context.

We theorise that relational trust is particularly relevant to charities, especially in the context of fundraising, with its emphasis on donor stewardship requiring charity fundraisers to nurture a bond with the donor and not do 'anything that might jeopardize it' (Burnett, 1992, p. 48). Trust plays an important role in such relationships with higher levels of trust correlated to a greater propensity to give (Burnett, 1992).

### 1.4 | Social capital and identity trust

Charitable giving exists within a social context and social networks through which donors 'recruit one another for good deeds...' (Putnam, 2000, p. 117). Brown and Ferris hypothesised that social capital facilitated 'pro-social behaviours' including philanthropy. They found that 'individuals with greater stocks of network-based social capital' donated more to charitable causes (Brown & Ferris, 2007, p. 20). Hence charitable giving may be predicated on and informed by the donor's social networks, moreover, the reason and the amount that someone gives may be determined by who asks them. This introduces the notion of 'identity trust' which posits that a decision to donate is not only informed by an intellectual desire to enhance public good but is also motivated by personal identities and social networks.

Scharf and Smith (2016) explored the effects of social networks upon charitable giving through the lens of relational altruism and concluded that donors 'are motivated not (just) by the desire to contribute to the public good, but also by' their personal relationship with and to the fundraiser (Scharf & Smith, 2016, p. 2). Chapman et al concurred, finding that 'success in peer-to-peer fundraising' was shaped more by the solicitor 'than by the charity' (Chapman et al., 2019, p. 573).

We theorise that trust in social capital can serve to undermine the use of evidence by philanthropists, for if donors are motivated by

and prioritise their relationship to the 'solicitor' rather than paying 'attention to effectiveness ... when selecting charities to support ...' they are less likely to be concerned with the outcomes of the charity and therefore, 'do not need to trust organizations to deliver effective aid' (Chapman et al., 2021b, p. 1275).

Furthermore, trust in social capital can 'distort giving between charities' as those charities with extensive networks will 'attract more funding than they otherwise would, while those charities with weaker connections will suffer, irrespective of merit or individuals' true validation' (Meer, 2009, p. 1). Indeed, such is the concentration of wealth that only a very small segment of society will determine which charities and interventions are worth funding (Barkan, 2013) leading to criticism that elites primarily fund concerns of interest to elites. Consequently, philanthropy cannot be relied upon as an effective tool for poverty alleviation as is illustrated by the fact that between 2009 and 2019 British based philanthropists donated £1.04 billion to the arts but only £222 million to the alleviation of poverty (Vallely, 2020).

### 1.5 | Trust in a charity's mission

Trust in a charity's mission arises when there is a common interest between the charity's mission and a specified public need (Bryce, 2016). So, if a charity's perceived values are aligned to the donor's values, trust is likely to be inferred. Wymer et al. agreed that 'congruence between an individual's core values and those inferred by the nature of a charity's mission ... influences an individual's trust in that charity' (Wymer et al., 2021, p. 4). Hence, trust in a charity's mission may be mediated by whether or not donors agree with its mission (Vallely, 2020).

#### 1.5.1 | How is trust operationalised?

Chapman et al. identified four mechanisms for operationalising trust:

1. Generalised social trust relied on actors having a 'propensity to trust unknown others' which was deemed necessary for operationalising trust in charities 'when the donor cannot observe the distribution of funds' (Chapman et al., 2021b, p. 1276). They observed that people with higher levels of generalised trust were more likely to donate to charities as were people with higher levels of institutional trust.
2. Institutional trust related to the extent to which individuals trusted the 'institutions in their society' and their willingness or otherwise to trust 'non-profits to work effectively' (Chapman et al., 2021b, p. 1276).
3. Sectoral trust reflected the level of trust that individuals had in the non-profit sector as a whole.
4. Finally, organisational trust referred to the trust that a donor had in a specific charity which would inform whether or not the donor chose to support that charity.

Sargeant and Lee (2004, p. 191) operationalised four dimensions of trust buttressing a donor's relationship with a non-profit:

1. Trust could be intuited when the donor was willing to invest 'time, talent and treasure' in their relationship with the beneficiary non-profit.
2. Trust was indicated when there was reciprocity between the donor and the charity enabling them to influence each other's views.
3. Trust was implied when the donor valued meaningful communications with the charity and
4. Trust was intuited by the extent to which a donor chose to resist the opportunity to donate their funds elsewhere.

To these we would add a fifth dimension in which trust was enhanced when the charity could demonstrate competence.

## 1.6 | Definitions

We employed the following definitions in our research:

1. Ultra-high-net-worth individuals (UHNWI) have investable assets of at least US\$ 30 million (Hayes, 2020).
2. High-net-worth-individuals (HNWI) are people with a net worth of US\$ 5 million+ (Hayes, 2020)

### 1.6.1 | Purpose of this study

A recent study conducted by the authors, found that the majority of participants sought out the endorsement of a trusted peer ahead of deciding whether or not to fund a particular charity.

This study builds on those findings by examining the manner in which trust and relationships influence the wealthy to give or withhold funding to charities and whether trust serves to support or undermine the use of evidence by philanthropists.

## 2 | METHODOLOGY

Because of the importance of explicating the donors' own viewpoints, the authors employed qualitative research methods to 'generate knowledge grounded in human experience' (Sandelowski, 2004 cited in Nowell et al., 2017, p. 1) and so gain an understanding of 'the experience of other people and the meaning they make of that experience' (Seidman 2006 cited in Mears, 2009, p. 29).

The predominant method of data collection comprised semi-formal interviews which utilised open-ended questions based on a topic guide (Appendix B) informed by the authors' scrutiny of the extant literature and their systematic review. Semi-structured interviews allowed for interpretation in accordance with the participants' own understandings and the probing of complex issues (Greenhalgh & Montgomery, 2024).

The authors utilised Braun and Clarke's 'reflexive thematic analysis' method of (Braun & Clarke, 2006, p. 84) which employs six key stages: familiarisation; coding; generating themes; reviewing themes; defining and naming themes and reporting.

The thematic analysis was further strengthened by the principles delineated by Creswell (2009), to ensure that data interpretation was both well-organised and reflective. This enabled a rich, nuanced, and discerning examination of the data, which aligned with the empirical objectives of this study.

### 2.1 | Sampling strategy

The sample frame comprised The Coutts Million Pound Donor List and the Sunday Times Giving List, both of which collate HNWI and UHNWI donors. Having identified donors from the sample frame, the researchers employed a mixture of convenience, snowball, and purposive sampling.

The sample comprised 17 elite HNWI and UHNWI donors. Determining an adequate sample size is not without controversy as, 'choosing a suitable sample size in qualitative research is an area of conceptual debate and practical uncertainty' (Vasileiou, Barnett, Thorpe, and Young (2018:1) cited in Sebele-Mpofu, 2021, p. 11). However, as in-depth interviewing requires a purposive sample with relevant experience, such a sample need not be large for the 'goal is depth not breadth' (Mears, 2009, p. 88).

The authors deemed the sample adequate for the purposes of the study as it enabled them to reach data saturation and in so doing provided 'some degree of transparency and quality in sampling' (Sebele-Mpofu, 2021, p. 11).

### 2.2 | Elite interviewing

All participants qualified as 'elites'; a group that could be hard to reach compared to other social groups (Liu, 2018). The lead researcher therefore employed convenience sampling; six of the participants were known to the researcher through her work and so she contacted them directly. Snowball sampling was then utilised, by which initial participants introduced the researcher to subsequent interviewees.

Ethical approval was granted by The University of Birmingham Humanities & Social Sciences Ethical Review Committee (ERN\_18\_1290) on 23rd January. The researchers committed to keeping the identities of participants confidential and to ensure the security of the data collected, all interview recordings, transcripts and contact details were stored separately, with documents password protected.

Initial interviews were conducted in person (at a location chosen by the participant) between February 2019 and April 2020 and were typically of 1 hour's duration. From mid-March 2020 five of the interviews were conducted over zoom in response to the pandemic.



## 2.3 | Data analysis

The primary means of data collection were semi-structured interviews which allowed 'thick, powerful, descriptions of participant's experiences to be obtained' (Greenhalgh, 2017, p. 21). Interview questions were derived from their systematic review and were augmented by a wider review of the extant literature.

Interviews were transcribed and analysed within NVIVO 12. The authors utilised Braun and Clarke's reflexive thematic analysis allowing for 'a rich and detailed, yet complex account of data' (Nowell et al., 2017, p. 2). To ensure dependability of the coding decisions 20% of interviews were coded by the second author [some minor modifications were made following this feedback].

## 2.4 | Reflexive statement

The study was conducted by two white middle-aged academics. The lead researcher was a white middle-aged post-graduate, with extensive board level experience of non-profits and experience of working with philanthropists and UHNWI donors. The second author was an academic who focuses on the 'what works' agenda.

We recognised that our research approach was informed and influenced by our backgrounds and so we engaged in ongoing self-reflection to address any inherent biases and to safeguard against partiality. We sought to critically evaluate how our identities influenced both our interactions with participants and our analysis of the data. We aimed to ensure objectivity whilst recognising our unique viewpoints and remaining aware of the power dynamics and privilege which informed this study. We believe that this reflexivity served to augment the integrity of our research.

## 3 | FINDINGS

This section presents the findings from our study and focuses on how trust and relationships impact on the giving decisions of philanthropists. Please note that throughout this section, numbers follow each quotation, each of which corresponds to individual participants. We have utilised numbers as identifiers to ensure anonymity whilst still allowing readers to distinguish between the different participants.

The 17 participants in the study comprised: six participants who identified as female and 11 who identified as male. All participants were 45+ with 52% aged between 55 and 64; all were graduates. 11 were British; two American, two held dual American-British citizenship and two were Canadian nationals. 11 qualified as UHNWIs; six as HNWIs. Three worked in finance, three were investors, one worked for a hedge fund, two ran their family offices, one was an accountant, one a management consultant, two were entrepreneurs; two were journalists and two did not disclose their profession. All qualified as 'major donors' namely someone whose gift to a charity had a 'significant impact' on that organisation (Fundraising, 2020). A table of participant characteristics is attached in Appendix A.

Four key themes and four sub-themes relating to trust and relationships emerged from our data, revealing the extent to which trust mediated the participants' relationships with charities:

1. Organisational trust
2. Trust as transparency
3. Trust in own judgement
4. Relational trust

### 3.1 | Organisational trust

Organisational trust comprising trust in the leadership, trust in the competence of the organisation, trust in the mission and trust in the benevolence of the organisation was sought by most of the respondents: 'It's all about the reputation of the organisation' (005). Within organisational trust there was some overlap.

#### 3.1.1 | Trust in the charity leader or leadership

Organisational trust is 'actualised in the trust one places on individuals working on behalf of the organisation' (Wymer et al., 2021, p. 6). This framing was reflected in our findings; 16 respondents emphasised the importance of trusting in the charity leadership.

It's all about people, in everything (007).

How much confidence do you have in the people running the thing (019).

If you don't believe they are really capable... if they don't meet your scratch and sniff test, you don't do it (001).

Such was the importance of trusting the charity leadership that two respondents stated that they would reassess their funding if the leadership changed (001 and 002). Some participants sought particular qualities in the charity leaders that they supported:

So, team player, people by and large not selfish ... (007)

Two participants wanted to have confidence in and to be able to trust the whole of the team:

... we want to see everybody from the top down (014).

Trust in the leadership can on occasion serve as a substitute for due diligence:

I'm giving it because I trust you, XXX even though I may or may not actually know anything about the organisation you represent... and so all the burden is on my trust in you (015).

You back the individual to figure this stuff out and you know that their heart is in the right place (016).

I like to have a theme around girls and women as well as a cost cutting theme (009).

### 3.1.2 | Trust in the competence of the organisation

11 out of 17 respondents sought evidence that they could trust the organisation to be competent in how it conducted its affairs.

Competence was framed as an organisation being able to 'punch above their weight in terms of what they're doing' (014) and could also be expressed as confidence in the organisation and the leadership.

You have confidence that the people who are running it are going to be sensible ... (013).

Several donors elaborated that confidence implied:

Somebody who can explain things properly, has the right checks and balances and control, is careful with money, seems like a good administrator and who has really high-quality staff around them (001).

It's about time allocation and prioritisation, short-term and long-term (009).

Another cautioned that it was important to ensure that the charity was, 'well-governed' and 'solvent' (008).

### 3.1.3 | Trust in the mission

For many respondents their alignment to and trust in the mission was a key component in their decision to support a particular charity.

... we have to really believe in it (001).

You've got to be passionate about what it's doing (008).

One donor stressed the importance of understanding the mission and vision of the charity:

You look at ... what a charity wants to do, what is its mission and vision and how are you going to measure against that mission and vision, I think that's really important (004).

Not all respondents were focused on a particular mission, although seven highlighted a thematic focus. All six female respondents spoke of having at least one thematic or mission focus to their giving.

One American donor exclusively funded political candidates stating that, 'I don't think there's anything more important'. (016); another largely funded clinical trials (010).

Only one respondent expressed concern about mission drift: 'there seemed to be quite a lot of mission drift as well, which we are always very concerned about' (014).

One respondent described themselves as cause-agnostic.

... we need to ... understand what are the most important problems? ... What are the most impactful interventions and ... which have the highest need of more funding? ... I basically said ... I'm going to be cause agnostic and just think about how capital is allocated and why does it work the way it works and how could it work better? (015).

### 3.1.4 | Trust as benevolence

Only one respondent framed trust through the lens of 'benevolence' by which we mean, prioritising the interests of others. We hypothesise that few respondents talked of 'benevolence' because they assumed that 'prioritising the interests of others' underpinned the work of the charities that they were supporting.

... you know that their heart is in the right place and that they want to do a good job... (016).

## 3.2 | Trust as transparency

Several respondents specified transparency and accountability as key factors buttressing their trust in an organisation. Respondents sought evidence of accountability and impact to affirm their trust:

Transparency extended to reporting outcomes and impact and also reporting failures.

We learn to trust because of accountability, not because of a lack of accountability. So, we don't trust because we just feel like we ought to trust... ultimately it is... I'm holding you accountable for something (006).

One respondent explained that a charity's willingness to explain that something they were funding was not working, served to strengthen their trust in the organisation:

One of the things I really liked about them was that, you know, when it didn't work ... they said, 'it's not working here for this ... reason, so we're not going to carry on with that one'. ... We don't mind if things



don't work ... 'we're on a journey together and if something's not working and you think that and there are good reasons for it then please come and tell us and explain it and, you know we'll evolve what we're doing with you' (014).

Another respondent observed that transparency served to 'take friction out of the system' (006) and facilitated trust because, 'trust is built one tick at a time because there's accountability attached to every effort, every move, every objective, and everyone knows that. And so, it's okay if it's not working' (006).

However, several respondents speculated that few charities were comfortable being open and transparent; rather many were 'scared stiff of being open ....' (007). Another observed that 'Negative results are rarely reported' (012) because 'nobody wants to hear the negative news' (015).

### 3.3 | Trust in own judgement

Another theme to emerge was that of 'trust in one's own judgment'. This was referred to by four respondents as a 'smell test' and by another as trusting your gut.

I feel really strongly about the importance of instinct and gut... (010)

Just what smells right (002)

Numerous respondents expressed faith in their own ability to pick good people and one conflated their own judgement with due diligence:

I've got a pretty good feel for people... (013)

Due diligence is I can judge the person like that (007).

However, one respondent cautioned that the gut should only be one element of the decision-making process, 'you just have to be sensible about it. So, I wouldn't ever... just go with your gut' (014). Nevertheless, another reflected that even if good data were absent, they might still choose to fund a particular charity if their gut was telling them to.

... where the impact isn't proven yet, but we have a strong gut feel or a view that you could create a successful outcome if only you rolled your sleeves up and helped to get there... (016).

The same respondent elaborated: 'I am a little bit of a believer in if it feels good, if it looks good, you take the leap of faith' (016).

### 3.4 | Relational trust

Multiple respondents sought or relied upon the endorsement of a peer as a proxy for due diligence:

I assume that they would have done their due diligence because they're all fairly sophisticated, good, decent people and they would only ask me if they were confident themselves (013).

Anything that XXXX does and tells us to do, we do (002)

However, two respondents cautioned that putting one's trust in an individual could serve as a barrier to utilising evidence if it stopped them from 'doing their due own due diligence' (001).

I see what they've done in some places, and you think, 'Why in god's name?' They're very often followers of individuals rather than following the science (012).

Many respondents were initially introduced to a charity that they supported by a peer.

I take the view if they want to support it and they're asking me to support them ... I do it to support them, rather than the charity to be honest (013).

Indeed, one respondent reflected that initially, their giving was entirely in response to the solicitation of friends: 'Friends saying "would you support this charity?" ... I mean it really was that sort of random. So, I think it was heartfelt but ... not done very well and not done with any great thought and as a result not very effective' (014). Subsequently, they worked with a philanthropy consultant to create a strategy for their philanthropy.

Three respondents observed that solicitation was reciprocal: 'what goes around comes around and we all keep on hitting each other for different charities' (13).

You go out and solicit, you know you kind of do the 'I'll solicit my friends, you solicit yours' (006).

In some instances, participants were supporting charities despite not believing them to be well run or whose mission they were not aligned to, because they were solicited by their peers:

I've been giving £XXX a year and I'm sponsoring five children and I said, 'I don't agree with these kinds of programmes' and I said, 'So I'm breaking a rule to do this and so please don't get them to write to me' ... I really don't like the sponsorship models at all... (005)

The majority of respondents said that they would donate to a charity if asked to by a friend or relative however, one respondent

explained that they gave at a lesser level if the charity did not fit within their thematic interest: 'I'll give them £250 or £500 or something...' (O05).

## 4 | DISCUSSION

The meanings attributed to 'trust' are numerous and contested, nevertheless there is some consensus that trust required 'some vulnerability'. Mollering observed that trust required a 'leap of faith'. This was borne out by our study in which multiple respondents referred to 'relying on' or 'trusting their gut' or utilising a 'smell test' and one reflected Mollering's words, namely that 'if it feels good, if it looks good, you take a leap of faith' (O16). Certainly, many respondents were balancing their beliefs and values with what they saw which was borne out in trust. For those respondents relying on trust and instinct the emphasis was on psychodynamic rather than cognitive behaviours as they prioritised their beliefs, values and instinct over data and evidence.

Charitable giving does not take part in a vacuum but rather exists within a social context and social networks may 'provide the channels through which we recruit one another for good deeds...' (Putnam, 2000, p. 117). Such is the importance of social networks and social capital that one respondent surmised that the charities that succeed were those '...that somehow find their way into my or anybody else's social network and then it's all about social capital' (O15). Multiple respondents recognised the value of their social capital to the charities they were supporting and talked both of soliciting and of being solicited by their peers to support charities. In many instances their first introduction to a charity they supported was through an introduction from a friend, relative or peer.

Brown and Ferris hypothesised that social capital facilitated 'pro-social behaviours' including philanthropy. They examined the extent to which social capital, human capital and religiosity influenced charitable giving and concluded that 'Individuals with greater stocks of network-based social capital tend to give more to religious causes and to give more to secular causes' (Brown & Ferris, 2007, p. 20).

Hence, charitable giving could be predicated on and informed by the donor's social networks, furthermore, whether and how much someone gives may be determined by who asks them.

Social identity theory was founded on the premise that an important determinant of individual behaviour was membership of a specific social group (Davis, 2014). However, memberships of groups may be fluid and subject to change, and individuals may be members of multiple social groups. Chapman et al. sought to examine how different social identities underpinned giving preferences, relationships to charities and the extent to which donors utilised 'their own and others' identities to justify their charity preferences' (Chapman et al., 2020, p. 1279). They identified multiple identities which might influence a donor's decision to donate to a charity but pointed out that 'not all identities are equally likely to inform giving' (Chapman et al., 2020, p. 1288). This was illustrated by one respondent who framed their giving through the lens of social identities:

There are some charities, particularly home charities, that we feel are almost a tax on the community. I mean we have to give to say, the Jewish community. We have to give to the old people... So, we automatically give to these because we think that there's an obligation and frankly and it's probably not very ... directional but some people who we know and like... when they ask... (O13).

Chapman et al also sought to understand the extent to which social groups and networks informed charitable giving and concluded that the solicitor was the key contributory factor to fundraising success and that 'success in the peer-to-peer fundraising context is influenced more by the champion than the charity' (Chapman et al., 2019, p. 573). Their findings were borne out by our study. Multiple respondents began their relationship with a particular charity after their peers had solicited them for money on the charity's behalf. Indeed, they may have donated out of a sense of social obligation or out of a perceived need for reciprocity.

Accordingly, many donors were giving to a charity that was not allied to their own values or sense of mission; such a tension between their beliefs and behaviour could give rise to cognitive dissonance as their giving was not aligned to their preferences: 'A lot of people give because their friends ask them, but what they prefer to do is really quite different in many cases' (O13).

Our findings reflect the first of Sargeant and Lee's four dimensions of trust in which a donor's giving behaviour is mediated by the extent and warmth of their relationships with their peers. They also accord with Bryce's depiction of trust in a charity's social capital as identity trust, whereby a donor shared a 'common identity' with a peer, which in turn generated trust or alternatively, led to a donor supporting a charity on the recommendation of a peer (Bryce, 2016). The extent to which a charity will be successful in raising funds may therefore be more dependent on its social capital than on its impact. Hence charities needing to fundraise may choose to prioritise limited resources on building social networks and investing in peer-to-peer fundraising programs, which was viewed as the 'most effective way to identify and engage Major Donors' by the Institute of Fundraising (2013, p. 7).

Several experimental studies examined the extent to which similarities between donors impacted on charitable giving and concluded that individuals tended to be influenced by and conform to the behaviour of their peers, or to people that they perceived as being similar to themselves. Thus, illustrating that peer pressure in all its forms was crucial, for 'one reason why the rich give is that their interest is engaged by the right person in the right way at the right time. This is fundamentally important' (Lloyd, 2000, para 10).

Accordingly, someone was 'more likely to donate (or donate more) to the same cause' if a solicited by a peer from their social networks (Tian & Konrath, 2020). More than a third of respondents to a recent survey (of 400 high net worth individuals) cited encouragement by family and friends as having influenced them to give and 24% made more significant gifts when they realised that 'their peers were major

givers, highlighting the value individuals place on doing what is expected'. (Savanta, 2019, p. 12). Similarly a number of studies have found that solicitation was closely correlated to an individual's decision to make a gift (Bekkers & Wiepking, 2011; Neumayr & Handy, 2017).

Peer influence can be instrumental in increasing the amount that is given by the wealthy to charity, however, it is not without its downsides. One respondent offered the following critique: 'White, wealthy guy defines the problem and the solution, terrible outcome' (O15). Another concern is that peer influence could cause funding to coalesce around a small number of charities to the detriment of other equally valuable but less well-known charities. We hypothesise that less 'popular' or well-known charities could be left struggling to compete for a share of any residual funding as wealthy donors become, 'powerful drivers of a range of agendas' for it is the money that decides and that 'drives the solution' (Callahan, 2017, p. 19).

Furthermore, the significance of peer endorsements of charities is such, that donors may end up funding less effective or even harmful charities. The demise of the UK charity, Kids Company, was a recent example of how peer influence polarised funding towards a charity that it transpired was not sustainable. Kids Co drew support from many high-profile public figures and received almost £50 million in public funding before it collapsed in August 2015. The House of Commons' Public Administration and Constitutional Affairs Committee's (PACAC) report into the collapse of Kids Co found that: its CEO, Ms Batmanghelidjh captivated 'some of the most senior political figures in the land, by the force of her personality' (PACAC, 2015-2016, p. 58, para 42) and held that it was unacceptable that, 'successive Ministers appear to have released funds on the basis of little more than their relationship with a charismatic leader ... and anecdotes...' (PACAC, 2015-2016, p.43, para 151). Subsequently, in 2021 the High Court exonerated Ms. Batmanghelidjh and the charity (Official Receiver-v-Batmanghelidjh & Others, 2021). This finding illustrates that trust is complex and multifaceted and further demonstrates the importance of ensuring that funding decisions are informed by evidence rather than relying solely on peer endorsements and instinct.

Another theme to emerge from our data was the importance of the donor's 'trust in the mission'. Nevertheless, several studies have revealed that even when the mission of charity did not align with their own preferences, donors would still support the charity in order to 'signal loyalty to friends or neighbours' [Ideas 42 Behaviour and Charitable Giving May 2019, p. 1]. Indeed, reciprocity in social relationships was cited by several respondents as an explanation for their giving, 'well, because if someone has done you a favour ... I'm very privileged, a lot of people have done me favours, I'd like to pay the favour back' (O07).

Respondents' engagement with particular charities was commonly mediated by relationships with members of the charity team. Our findings concur with Wymer et al. who found that trust in a charity is enhanced when a donor has 'personal connections with members of a charity' (Wymer et al., 2021, p. 5) Certainly, many respondents sought an ongoing relationship with the CEO or senior staff to assure themselves of the integrity and competence of the organisation that they

were supporting. This is an example of relational trust in which charities sought to create a distinctive and close connection to donors and their 'overriding consideration' was 'to care for and develop that special bond and not to do anything that might jeopardise it' (Burnett, 1992, p. 48 cited in Sargeant & Lee, 2001, p. 71).

The prioritising of donor relationships by charities may serve to undermine the use of evidence. Donors do not always want to hear (or the charities fear that they do not wish to hear) that a particular intervention has not worked. Hence, charities may be fearful that if they communicate bad news, they will alienate their donors, which in turn may mean that they are not as transparent as they should be or indeed as donors wish them to be. One respondent confirmed that many charities are reluctant to communicate that something is not working as they fear that if they do, the donor might 'turn off the tap' (O14). However, respondents valued transparency in their relationships with charities. Farwell et al defined transparency as, 'the voluntary disclosure of information' (Farwell et al., 2019, p. 772) and Wymer et al. found that transparency was 'the strongest antecedent influence on charity trust ... individuals are more likely to trust charities that communicate how they use their resources' (Wymer et al., 2021, p. 19). Indeed, a survey of 'public trust and confidence in charities' revealed that the public wanted charities to be transparent in their management of their resources and also to demonstrate their impact (Populus, 2018, p. 3). Certainly, half of donor respondents cited transparency as necessary and a way in which the friction could be taken out of the system. However, the head of the Association of Chief Executives of Voluntary Organizations (ACEVO) cautioned that the public have 'cognitive dissonance' in relation to charities '... it wants them to be transparent, but reacts badly to what they disclose; ... it expects them to have rigorous internal processes, but resents their spending on administration; and ... it thinks there are too many of them, but is suspicious of big ones' (Brindle, 2018). Indeed, several respondents expressed an aversion to overhead costs. However, one fifth of respondents proactively encouraged their beneficiary charities to share 'failures' with them and to be more open, with one pointing out that if they are informed of what's not working, then provided there are good reasons for the miss-step they would work with the charity to enable it to find a different way forward.

In tandem with transparency, accountability encompassing 'not only the reporting of financial information but also ... performance evaluation, stakeholder engagement and internal commitment to the ... mission' (Kearns, 1994 and Schmitz et al., 2011 cited in Farwell et al., 2019, p. 772) is closely aligned to transparency and was sought by the majority of respondents.

Several respondents wanted a degree of influence on the beneficiary charity and seven actually sat on the boards of charities they supported. This finding complies with the second of the four dimensions of trust the 'extent of mutual influence which is mediated by commitment'.

A few respondents sought out annual reports and regular updates to as confirmation that the charity was performing well, 'we ask for written reports of what's going on, so they know we're keeping an eye on it' (O13). However, on occasion the communications provided

by the charities were not sufficient to meet the needs of the donor or to satisfy the donor's concerns about the charity, one respondent theorised that this was because charities were frequently swimming, 'in a sea of data without any insight' (009). The same donor elaborated that the problem with data was that 'most people still don't understand it in the sector, they don't know how to use it, they don't collect it properly and so ... it's not fit for purpose' (009). In such instances some donors requested further information because 'the reports themselves don't necessarily cover what we need to know' (013).

Such requests for and reliance upon communications from the charity were an example of the third dimension of trust namely that in which, 'the amount of communications acceptance that is mediated by commitment'. Not all respondents complied with this dimension of trust however, two respondents observed that once they trusted a charity sufficiently to fund it, they did not require any reporting and another commented that they were happy to receive a repurposed report which the charity had written for someone else. A third complained that they received too many communications.

Although none of the respondents commented on their forbearance from opportunism, in choosing to support some charities over others and citing their criteria for the making of such choices, they were in fact demonstrating at least a degree of forbearance from opportunism.

The responses of our respondents were illustrative of three of the four dimensions of trust proposed by Sargeant and Lee and also of the fifth dimension of trust (as competence) suggested by the authors.

## 5 | CONCLUSION

Notwithstanding a growing awareness that 'the giving of resources ought to be informed by evidence' (Greenhalgh & Montgomery, 2020, p. 1) and an emergent enthusiasm for evidence-based philanthropy, the majority of respondents nevertheless relied in the first instance on peer endorsements.

We hypothesise that trust could serve to undermine evidence, as instead of seeking out the best and most effective charities many of our participants instead sought out and relied upon the endorsements of their peers as a proxy for evidence. With a few exceptions, even those donors who sought to apply evidence, only did so after being steered to a particular charity by a peer or after seeking the endorsement of one of their peers. This in turn meant that some donors may have missed out on funding the best and most effective charities and hence they were not deploying their funds in the most optimal way. Instead of funding initiatives that scored 9 or 10 out of 10 they were only funded ones scoring '3 [out of 10] because somebody likes somebody' (007). Moreover, as was illustrated by the scandals which besetting Kids Co, Oxfam and Save the Children, even well qualified peers were not always the most reliable judge of a charity's sustainability or competence.

Further problems may arise when donations to charities conform to the donations of a donor's peers. Not only may funding polarise around particular charities and issues but also in the absence of

rigorous evidence, donors could end up funding charities that are not effective or even worse which cause (unintentional) harms. Moreover, when funding coalesces in this way it could fuel criticism of philanthropy. Trust is not a singular construct and in recent years there have been a number of critiques of high value philanthropy, reflecting a lack of trust of the motives of donors. One such critique is that elites only fund causes that are important to elites and as such there is a perception that philanthropy favours the wealthy (Vallely, 2020). Some commentators have highlighted the implicit power that yields to philanthropists as their giving serves to 'skew spending in areas such as education and healthcare, to the extent that it can overwhelm the priorities of democratically elected governments and local authorities'. Such concerns may be amplified when funding is polarised around a small number of charities or causes that find favour amongst particular social networks. Indeed, a recent report revealed that most people did not trust donors to 'do what is right with their donations...' (Breeze, 2020, n.p.). Certainly, 'suspicion about philanthropists and their motivation undermines the broad acceptance of the benefit of philanthropy' (James Lisbon cited by May, 2020). With a projected £10.4bn funding shortfall for charities, there has never been a more urgent need for philanthropists to give more and to give better' it is problematic therefore that 'negative perceptions of philanthropists might deter people from giving more to charity' (Breeze, 2020, n.p.).

In conclusion, trust is a multifaceted construct that is derived from numerous and varied interactions. Trust underpins the relationships that philanthropists have with charities and is an important conduit to forging an ongoing relationship. In the absence of trust, donors are unlikely to fund a particular charity and trust is frequently relied upon as a proxy for evidence.

Charities need to recognise the many components of trust and in particular be encouraged to see accountability and transparency in relation to what does and does not work as an essential component of trust and of the stewarding of donors. Donors can encourage such honest and transparent communication by engaging with the charities—seeking to understand what works and what doesn't—showing a willingness to fund core costs and not withdrawing funding simply because something hasn't worked.

In light of the pandemic, there has never been a more urgent time for philanthropists to deploy their funds and to do so judiciously, as such, donors need to be encouraged to seek out evidence-based solutions and not rely solely on the recommendations of their peers or their instinct. However, it is important to recognise that philanthropy is informed by both head and heart, and to acknowledge that whilst evidence of effectiveness is vitally important, the values and emotions that underpin philanthropy can serve to enhance donor engagement and possibly lead to a more significant gift. The effects of either approach are currently unknown and further work to test these differing approaches would be of considerable interest to the field.

This paper concludes that donors should be encouraged to take a hybrid approach to their philanthropy. Such a model is informed by the psychosocial factors that will inevitably influence their decision-making, but also ensures that their decision is informed by rigorous evidence and data enabling them to better understand and maximise the impact and effectiveness of their philanthropy.

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## CONFLICT OF INTEREST STATEMENT

The authors declare no conflicts of interest.

## DATA AVAILABILITY STATEMENT

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

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## APPENDIX A: TABLE OF CHARACTERISTICS

Participant No	Gender	Age	Nationality	Education	Net worth millions	Profession
001	Male	50–60	American	Graduate	£50–£99	Finance
002	Male	50–60	British	Graduate	£100+	Family office
003	Female	50–60	American	Graduate	Not disclosed	Journalist
004	Female	50–60	British	Graduate	£50–£99	Family office
005	Female	50–60	Canadian	Graduate	£10–£29	Not disclosed
006	Male	60+	American	Graduate	£100+	Entrepreneur
007	Male	70+	British	Graduate	£50–£99	Investor
008	Male	70+	British	Graduate	£100+	Banker
009	Female	50–60	British	Graduate	Not disclosed	Medicine/BioTech
010	Male	60+	British	Graduate	Not disclosed	Accountant
011	Male	60+	British	Graduate	£50 to £99	Entrepreneur
012	Male	60+	British	Graduate	£100+	Private Equity
013	Male	80+	British	Graduate	£50–£99	Businessman/Investor
014	Female	50–60	British	Graduate	£100+	Family office
015	Male	50–60	American	Graduate	£30–£49	Management Consultant
016	Male	40–50	British	Graduate	£30–£49	Investor
017	Female	50–60	Canadian	Graduate	£30–£49	NED

## APPENDIX B: INTERVIEW TOPIC GUIDE FOR PARTICIPANTS (DONORS)

## A. Background/Context

1. Age
  2. Gender
  3. Education
  4. How long have you been a philanthropist?
  5. Do you have a family foundation or formal giving structure?
  6. Does your philanthropy have a particular thematic focus?
  7. Is your philanthropy grounded in a particular faith?
- B. How and when do philanthropists use evidence to inform their philanthropic practices?
8. How do you select which causes to support?
    - a. Do you take unsolicited applications?
    - b. Do you invite tenders for specific funding rounds?
    - c. How do you 'find' the charities that you wish to support?
  9. How and when do you use evidence?
  10. Do you consider any of the following?
    - a. The nature of an extent of the problems/issues (scale)?
    - b. What others are already doing about those issues (neglectedness)?
    - c. The extent to which the problem is solvable (tractability)

11. What do you think are barriers to your use of evidence?

12. What facilitates your use of evidence?

13. Have you ever received any professional philanthropy advice?

14. Are you a member of any giving circles/networks?

15. Do you have any concerns about the use of evidence?

## C. Trust and Relationships

16. To what extent does 'trust' underpin your decision to support an organisation?

17. How do you define trust?

18. Have you withdrawn funding in an organisation because your trust has been weakened?

## D. Meaning of Evidence

19. What do you understand by 'evidence'?

20. Do you distinguish between 'evidence'; 'knowledge'; and 'research'?

## E. How do philanthropists find, consume and understand evidence?

21. How do you find and consume evidence?

22. What criteria do you use to determine the quality of evidence?

## F. Knowledge for the charities

23. What do you think that charities ought to know before rolling out interventions?