Philanthropic Friction: Misalignments in Stakeholder Motives and Approaches

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On my honor as a University student, I have neither given nor received unauthorized aid on this assignment as defined by the Honor Guidelines for Thesis-Related Assignments.

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Technological innovations and increasing global interconnectedness allow nonprofits and donors to align their respective philanthropic goals. Rising third-party players, including charity raters, donor-advised funds, and crowdfunding sites, have promised to make donors' giving decisions easier and more effective. Annually, the more than 1.5 million nonprofits registered in the United States receive around $450 billion in philanthropic gifts and contribute over $1 trillion to the nation's gross domestic product (National Philanthropic Trust, 2020). Given the magnitude of the sector, the stakes for effective giving are high. However, donors are attracted to giving opportunities with emotional appeal and personal benefits. Meanwhile, nonprofit leaders attempt to appease both donors and external evaluators while maintaining a focus on their missions. The variance in goals and success metrics among stakeholders preclude any singular objective definition for philanthropic efficacy, but these misalignments create tensions in the giving process that lead to suboptimal outcomes. It seems intuitive that the Internet and accompanying third-party players would make philanthropy more seamless and straightforward. However, persisting asymmetries between the motives of donors and nonprofits continue to inhibit philanthropic results, and, in many cases, the entities designed to alleviate philanthropic friction have instead exacerbated it.

Review of Research

Donors' goals differ based upon their personal interests and goals. A joint study by the International Society for Third-Sector Research and Johns Hopkins University attempted to quantify the relationships between donor retention and other donor behaviors (Naskrent & Siebelt, 2011). The authors determined that donor commitment and trust have a significant direct effect on retention, and that donor involvement and satisfaction have important indirect effects. To capture long-term donors through these intermediates, countless researchers have attempted to segment individuals based upon their primary motivations. A 1994 study produced “Seven Faces of Philanthropy,” dividing individuals into distinct groups such as “The Devout” who gives because “doing good is God’s will” and “The Socialite” who gives because “doing good is fun" (Prince & File, 1994). Regardless of motivations, another 1994 book suggested that donors select recipients for their major gifts due to a connection with both the organization as a whole and with at least one of its individual representatives (Matheny, p. 191). Due to the increased accessibility of information and interconnectedness made possible by the Internet, “the number of charitable organizations raising money has ballooned, communication is entirely different, and people are more globally oriented than before” (Burk, 2018). A 2020 survey of 1000 donors suggests that most individual donors still give regularly to between one and three nonprofits, but that one-off donations are increasingly common and are typically motivated by unexpected income or urgent and specific organizational needs (Campaign Monitor, 2020). These nonprofit needs vary based upon the nature of services offered as well as catalysts within and beyond the organization. For example, most nonprofit fundraisers align their efforts with roughly five-year cycles based around strategic plans that culminate in capital campaigns (Kihlstedt, 2002). During campaigns, organizations are likely to have new infrastructure or program expansions in mind that may benefit from directed gifts, but during off-years it may be much more helpful to receive unrestricted funding to cover one-off expenses and ongoing operations.

The Association of Fundraising Professionals (AFP) and National Council of Nonprofits have each published Fundraising Codes of Ethics (2014; 2015). Both guides state that nonprofit fundraisers must ensure that gifts are used in accordance with donors’ intentions and also that their organizations do not engage in activities that conflict with ethical obligations to beneficiaries. Each mandates respecting the confidentiality of involved parties while also ensuring transparency of organizational activities, as well as acknowledging all donors' efforts while also prioritizing the philanthropic mission. The codes are not precise in defining appropriate balance points between these tradeoffs. AFP guidelines also deem "making public comments that are derogatory about leadership or organizational activities" unacceptable, providing little room for individuals to speak out regarding unethical or otherwise problematic developments (2015). The tensions produced by these varied stakeholder motives and expectations have resulted in several harmful patterns of failed gifts.

Sources of Philanthropic Friction

Conditional donations oftentimes inhibit the organizational resilience and autonomy of recipients. These gifts may include funds restricted for a particular use case, such as constructing a new building or establishing a particular scholarship, or may allow more flexibility in the use of funds but include more general demands for the organization. For example, in 1907, Anna Jeanes offered land worth an estimated $1 million to Swarthmore, a not-for-profit college, under the condition that the institution permanently cease to participate in intercollegiate sports. The college turned down this offer, reporting that "if competitive games with other colleges are on the whole objectionable, they should be abolished for that reason, and not because of the tender of a sum of money" (Swarthmore College, 2018). In this case, Swarthmore refused to alter its policy in exchange for money. However, donors are oftentimes able to achieve organizational influence with more subtle tactics. After the Smithsonian Museum agreed in 2001 to name its transportation exhibit after General Motors following the company's $10 million donation, political activist Ralph Nader declared that "to let GM pay for, be associated with, and influential over a transportation exhibit… is to confess to a complete abdication of any standards of museum integrity and independence" (Macari, 2002). Museum representatives repeatedly insisted that GM would have "zero input in the exhibition's creation," but a Smithsonian official acknowledged that "putting that name up top gives the perception that the corporation is calling the shots" (Sciolino, 2001). This damaged the perception of the public, who provided 70% of the museum's budget through congressional funding. Since 1990, the wealthy Koch brothers have given $50 million to George Mason University's Mercatus Center in return for involvement in selecting its faculty members (Flaherty, 2018). Students and faculty have repeatedly expressed concerns about this donor influence in academic matters, and although university representatives have issued statements suggesting that the institution will always prioritize academic integrity, the Kochs' gift terms indicate that they may revoke funds if they do not approve of faculty appointments (Green & Saul, 2018). This incentive structure places pressure on the university to potentially compromise its judgment to appease their preferences. According to Liza Cole, Director of Legacy Giving at the Children's Inn at the NIH, "people find it more enticing to give to a restricted fund because they want to know where their money is going," but since conditional gifts may be unavailable to aid recipients' most pressing needs, they are significantly less valuable than unrestricted funds (Cole, 2020). Moral issues aside, conditional funds impede an organization's ability to address nagging expenses and focus on its mission.

Donor affinities for novelty and recognition can also be problematic. Although philanthropists may want to erect flashy new buildings, nonprofits need modest repairs. Lisa Perlbinder is the Advancement Director for Madison House, a nonprofit student service hub based at the University of Virginia. She is an expert at speaking donors' language: "I don't say ‘we need a new closet with filing cabinets,’ I say ‘we’re building a programs lab with space for confidential activities’ (2021).” Regardless of what they are sponsoring, donors oftentimes want their name on it, which can cause conflicts in both the near and long term. When the Miami Art Museum announced that it would be permanently renamed after Jorge Perez following his $35 million donation, four board members resigned and threatened to rescind pledged contributions (Pogrebin, 2011). Meanwhile, other dissenters complained that “an institution built on public land and largely financed by taxpayers should not be named for an individual, no matter how generous.” Even if less controversial initially, naming rights can later lead to awkward donor relations and legal battles. When the University of Houston attempted to rename Hofheinz Pavilion, its basketball arena named after a 1969 donor, the Hofheinz family sued the school (Watkins, 2016). Although the lawsuit was settled, the university’s honor was publicly questioned, and it was forced to divert attention from its capital campaign to prepare a legal defense.

International aid in response to major world events and natural disasters also tends to be misguided and inefficient. Although attempts to allocate resources to areas in need may be well-intentioned, they often fail to mesh with local capabilities and response efforts. After the 2003 earthquake in Bam, Iran, other nations spent over $13 million on mobile hospitals and search and rescue teams, all of which arrived “long after the last casualty had been evacuated to other Iranian provinces” (Motamedi et al., 2009). Often, well-established institutions may receive aid surpluses while organizations with greater need are left hanging. Americans gave millions of dollars to the Notre Dame Cathedral after its 2019 fire despite over $500 million pouring in from French elites (McNicoll, 2019). Three predominantly Black churches in Louisiana that had recently been torched by a white supremacist received under $100,000 combined until activist outrage about this disparity broke out on social media. "Failed Aid: What Went Wrong?", a study by global development platform Devex, highlights failures of international aid to Kenya based upon 142 citizen reports. The stories include massive nutrition supplement shipments sitting in warehouses rather than being distributed, failed housing relocations by the United Nations Human Settlements Programme that left families stranded, and an ineffective $400 million slum electricity project by the World Bank that forced many villages to resort to alternative power provided by cartels (Wheeler & Langat, 2019). Although the organizations and strategies involved in these initiatives vary widely, the fundamental failure in each is an inability to understand and engage local communities when implementing programs.

Aid conducted by foundations, both globally and locally, also oftentimes fails to properly incorporate community input. In the midst of the Cold War and accompanying overpopulation concerns in India, the Ford and Rockefeller foundations helped Indian Prime Minister Indira Gandhi develop a large-scale sterilization campaign involving antifertility propaganda and “mass vasectomy camps” including economic incentives and punishments (Green, 2018). Although this program was backed by USAID, the World Bank, and the UN, it was widely opposed by the Indian public, resulted in thousands of deaths from failed procedures and violent protests, and is now considered a tragic stain on India’s past and a blatant human rights violation. Even when the target population is not across the ocean and the goal is less controversial, plans often go awry. In 2010, Newark mayor Cory Booker secured $200 million from wealthy investors, including $100 million from Mark Zuckerberg, to aid his Foundation for Newark’s Future in revitalizing the city’s school system (Gross & Russakoff, 2015). To gain board membership, individuals had to give at least $5 million dollars, which impeded local community representation. Although the Foundation hosted forums to seek the perspectives of teachers, parents, and students, education reporter Dale Russakoff wrote that "when the people hired to run listening sessions wanted to report back on what they heard… they were told that the city had already decided on the changes" (Clifford, 2015). A member of the Foundation's board told her "it wasn't real community engagement; it was public relations." The money went primarily towards expanding charter schools and restructuring the teacher union agreement. Although a 2017 report by Harvard researchers sponsored by Zuckerberg suggested improvement in students' English scores, an external critique by Rutgers reviewers determined that this perceived increase was likely due to changes in assessments rather than Foundation policies, and found "little evidence in favor of the Zuckerberg-funded reforms" overall (Chin et al., 2018; Baker & Weber, 2017). The stark disconnect between Booker's Foundation and Newark's constituents prevented effective diagnosis of the school system's root problems, and demonstrates the importance of alignment between various stakeholders within a community initiative.

Inefficacy of Third-Party Players

Sites such as Charity Navigator have established ratings to help donors evaluate the effectiveness of potential philanthropic targets, but their methods are largely flawed. Each has defined internal metrics such as "Financial Health" and "Accountability & Transparency," which are calculated based on figures such as the percent of the organization's budget spent on administration or fundraising (Charity Navigator, 2016). This data aggregation helps hold nonprofits accountable to reporting standards and provides donors with nonprofits' general budget summaries (Behn et al., 2010). However, these simplistic outlooks based solely upon recent spending ratios, typically only covering the past fiscal year, are not sufficient to indicate organizational efficacy (Lowell et al., 2005). The scoring methodologies fail to consider the tangible outcomes of services and therefore reflect a severely incomplete picture of organizational performance. Even sites which have begun piloting "impact scores" lack substantiation. For example, Charity Navigator offers a perfect "100" impact score for any food distribution program that provides a meal for "less than 75% of the cost that a food-secure person incurs to buy a meal in that county," which is around $3 in most regions (Charity Navigator, 2016). Therefore, a food bank with meals costing $1 each receives the same impact score as one whose meals cost $2 each. The continuum of scores should be useful in evaluating various good but imperfect solutions rather than indicating a threshold at which an organization is subjectively deemed "good enough." These metrics also fail to reflect essential dimensions, such as, in this case, nutritional value or accessibility of the meals provided.

Furthermore, ratings platforms oftentimes reinforce barriers to entry for developing organizations, increasing disparity in access to capital. Until recently, Charity Navigator required that organizations have seven years of annual tax filings and $1 million in annual revenue to be eligible for a rating (Charity Navigator, 2020). In July of 2020, the site announced the reduction of these requirements and expansion of their coverage from 9,000 to 160,000 nonprofits, but even after this dramatic expansion, they'll leave out 90% of the 1.6 million registered in the United States. Coverage is typically provided based upon budget size, meaning that well-funded organizations are the most likely to receive further publicity and donations. Further, the aforementioned obsession with financial ratios such as the cost to raise a dollar inherently benefits massive organizations, which have achieved economies of scale and require less marketing given existing name recognition. Oftentimes their brand strength seems impervious to criticism; the American Red Cross continues to raise hundreds of millions of dollars per year despite the organization's drastically ineffective responses to the 2010 Haitian earthquake and

2012 Hurricane Sandy (Elliot & Sullivan, 2015). Another metric commonly used in charity rankings is percent of budget spent on administration, which penalizes nonprofits with higher staff salaries. This is not how we evaluate results-oriented institutions such as businesses or schools. Just as well-trained and effective teachers who command higher paychecks can deliver more instructional value than ineffective ones, qualified employees can elevate a nonprofit's impact. It is essential to consider not only where donors' dollars are going, but also what they are actually doing.

Crowdfunding platforms are designed to provide immediate, direct relief for individuals or groups with pressing needs, but lack sufficient vetting and cater to emotional responses that do little to combat social problems. At its worst, crowdfunding enables criminals and predators to make easy money. The site GoFraudMe exposed dozens of fraudulent GoFundMe campaigns from 2017 to 2018, including such extreme cases as individuals who murdered their children or patients to profit off of their deaths (Gonzalez, 2018). The problem with most crowdfunding cases is not fraud but rather that their use cases are almost entirely focused on reactive rather than preventative giving. As Nonprofit Quarterly editor Erin Rubin argues, "paying one person's medical bills doesn't improve access for the 27.6 million Americans lacking health insurance" or make hospitals more effective (2017). In many cases, the money raised also far exceeds the real need. When Xiao Zhen Xie's nephew crowdfunded $1 million to pay her medical bills after a recent unprovoked anti-Asian assault, she requested that the funds be redirected towards combating racism in the Asian American community (Fortin, 2021). But in many cases, the terms of crowdfunding sites and expectations of individual donors prevent this type of dynamic distribution of funds towards real needs. After a group of schoolchildren harassed their unsuspecting bus monitor Karen Klein in 2012, a crowdfunding campaign with a goal of providing Karen $5000 to take a vacation raised over $700,000 (Sidorov, 2012). When the campaign's creator suggested that some donations go towards wider anti-bullying initiatives, "there was a big reaction. People said no. They wanted all the money to go to Karen" (Stevenson, 2013). In this case, the campaign's creator lost control of its outcome. Generally, though, after funds are disbursed to campaign owners, there are no requirements for these individuals to publicly disclose the use of the money, and most platforms deny responsibility for ensuring accountability in their Terms of Use (CharityWatch, 2017). Crowdfunding initiatives are therefore tremendously risky in addition to generally attempting only surface-level reform.

Increasingly popular donor-advised funds (DAFs) and foundations enable philanthropists to delay their giving despite enjoying immediate tax benefits. DAFs, intermediaries for donors to give to nonprofits through investment firms, began gaining steam in the 1990s and are technically considered charities themselves (National Philanthropic Trust, 2021). In 2018, five of the top six charity recipients of private donations were DAFs, and Fidelity's raised $9 billion, which is triple that of the top nonprofit, United Way, and more than all of the top five nonprofits combined (Stiffman & Haynes, 2019). Donors "have no incentives or requirements to ever distribute that money, and they can even pass their advisory privileges on to their heirs" (Colinvaux, 2021). In fact, only 20% of the $100 billion in DAFs and 6% of the $1 trillion in foundations is actually awarded to nonprofits annually, and since the institutions are 501(c)3 organizations, they pay zero federal income taxes (Hurtubise, 2017). Proponents of DAFs argue that donors may need time to identify an ideal recipient (Stanford Law School Policy Lab, 2019). While this may be true, because tax deductions are designed to incentivize aid to nonprofits, the deduction should be provided only after nonprofits have received this aid. Since over half of donors with incomes over $100,000 report that tax deductions motivate their giving, this powerful incentive is at risk of losing relevance (Reich, 2005).

Positive Trends in the Philanthropy Sector

William MacAskill's *Doing Good Better* argues that nonprofits should be evaluated based upon units called quality-adjusted life years (QALYs), which measure the value of services provided in terms of improvements to beneficiaries' quantity and quality of life (2015, p. 37). This approach enables side-by-side comparison of various potential philanthropic targets based upon their estimated return on investment. Givewell is a niche charity assessment organization that leverages this scientific approach to charity evaluation. It has identified anti-malaria measures, childhood vitamin A and vaccination distribution, deworming, and direct cash transfers to the extremely poor as the most effective giving opportunities (Givewell, 2020). However, the site is severely limited in its coverage, offering only a shortlist of what it considers to be the top nine nonprofits globally, each of which works primarily in Africa. While the maximum impact per dollar may be best achieved abroad, many donors value community involvement. LinkedIn co-founder Reid Hoffman suggests that we have a moral obligation to philanthropically support local communities "even if they don't leverage our contributions as efficiently as they might somewhere else," citing the ability to inspire others and build a culture of giving (Hoffman, 2015). MacAskill's and Givewell's approaches also fail to extend naturally beyond organizations with a medical focus. Regardless, evaluating nonprofits side-by-side based on how one dollar directly impacts an individual's wellbeing enables more objective and straightforward decision-making and more meaningful contributions regardless of gift size. This research-intensive approach will be difficult to implement on a wide scale, but can hopefully encourage the type of results-based accountability increasingly demanded by donors.

Various active policy proposals hold the potential to increase philanthropic equity and efficiency. In the aftermath of COVID-19, the Institute for Policy Studies recommends that Congress institute emergency mandates for private foundations and DAFs to increase payout rates, which could stimulate over $200 billion in nonprofit aid in the next three years (Collins & Flannery, 2020). Nonprofit leaders are demanding more stringent approval processes for 501(c)3 status and "more streamlined government grants and contracts" (Parks & Theis, 2021). Many are also pushing for a Cabinet position dedicated to the needs of nonprofits, which are currently inadequately represented within the Small Business Administration. Others are rallying to reverse the historically inequitable nature of tax incentives after the Tax Cuts and Jobs Act of 2017 "limited the charitable tax deduction to about 10% of the tax-paying population" (Andreoni & Durnford, 2017). Expanding giving incentives to all taxpayers has bipartisan support, and is essential to ensure that organizations and agendas receiving aid are not limited to those selected by wealthy white donors (Colinvaux, 2021).

Conclusion

To provide nonprofits the agency to leverage resources for urgent needs, donors should give unconditionally. In seeking philanthropic targets, donors should investigate specific organizational outcomes, which should also be the primary criterion for external charity evaluators. Donors should only give to crowdfunding campaigns that they vet extensively. Those seeking to conduct local or international aid should be intimately familiar with target constituents and their perspectives.

Many philanthropic failures stem from a lack of symmetry in information and understanding between stakeholder groups. Nonprofits serve two customer segments with often little intersection: public beneficiaries and donors. A similar disconnect exists between effective nonprofits and third parties informing and moderating philanthropic gifts. The solution to each of these misalignments lies in more intentional engagement with at-risk populations and assessment of their needs. Government reform is necessary both in creating an equitable giving landscape and limiting abuse of power by private institutions. Most importantly, nonprofits and philanthropists should attempt to quantify and constantly grow their impact based upon evidence-based outcomes.

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