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GLOBAL CHINESE PHILANTHROPY INITIATIVE
全球华人慈善行动

AMERICAN PHILANTHROPY LITERATURE REVIEW

Karna Wong
Paul Ong
Wenjuan Zheng

2014–2016

Professor Paul Ong, GCPI Research Director
UCLA Center for Neighborhood Knowledge
Global Chinese Philanthropy Initiative

The authors are grateful for funding support from the Greater China Philanthropy Initiative (GCPI). We would also like to thank Bill Parent for his careful review of drafts and for his comments. The content claims, and findings of this report are the sole responsibility of the authors, and do not represent the opinions of UCLA or its administration. Neither GCPI nor its partners endorse or are responsible for any of the views or opinions expressed in this work. The authors are not liable for misinterpretation of the provided information or policy failures based on analyses proved in this paper. All research was conducted by the authors using English-language sources.

Preface

This working paper is a part of a series of background papers produced for the Global Chinese Philanthropy Initiative (GCPI), which is a bilateral effort to study, promote, support, and highlight philanthropy among Chinese in Greater China and Chinese Americans. GCPI is a collaborative effort of Asian American Advancing Justice–Los Angeles, UCLA Luskin School of Public Affairs, and UC Irvine Long China-US Institute. Support for the GCPI comes from the John and Marilyn Long Family Foundation, Lao Niu Foundation, and Wallace H. Coulter Foundation. Additional support provided by UCLA's Center for Neighborhood Knowledge (née Center for the Study of Inequality) and Center for Civil Society. Stewart Kwoh, John Long, and Archie Kleingartner serve on the GCPI Executive Committee. The multiyear research plan includes four major phases: developing foundational knowledge through reviewing secondary data and existing literature; discovering new knowledge through primary social science research on philanthropy, civil society, and key sectors; evaluating case studies to examine the social, political, and economic impacts of philanthropy; and translating research into instrumental knowledge to improve policies, programs, and practice. The goal is the production of academically sound publications that inform and expand the bilateral dialogue and awareness among philanthropists, foundations, and corporate giving staff; community-based organizations and educators; media, policy makers, and the general public.

Professor Paul Ong serves as the Principle Investigator for the initial research phase (developing foundational knowledge), and the multidisciplinary team includes Professors Lillian Wang, Tilly Feng, and Jeff Wasserstrom, along with graduate research assistants at universities in China and the United States. Silvia Gonzalez serves as the project manager. The purpose of this phase is to develop an overview about the magnitude, patterns, and trajectory of Chinese philanthropy, and a theoretical/conceptual framework to guide subsequent primary evaluation and translational research. The researchers utilize two approaches: scholarship of integration of existing literature and descriptive statistics from secondary sources. When appropriate, the work takes a comparative approach by covering four predominantly Chinese societies: China, Taiwan, Hong Kong, and Singapore. When feasible, researchers incorporate primary information. (Another component of the GCPI covers Chinese American philanthropy, with its own publication series.) A primary objective of the initial research project is the production of working papers covering the following topics: literature reviews focusing on possible causal and motivational factors; an assessment of data availability; the early and twentieth-century histories of Chinese philanthropy; case studies of philanthropy in higher education; and a macrolevel analysis of philanthropy in the environmental arena. The findings from these scholarly efforts will help identify possible topics to be explored as a part of the second stage of the GCPI research agenda, which will be developed and led by Professor Lois Takahashi, Interim Dean of UCLA Luskin School of Public Affairs.

前言

本系列研究报告提供了全球华人慈善行动（GCPI – Global Chinese Philanthropy Initiative）的背景资料。全球华人慈善行动（CGPI）是一项双边学习，它意在推进和支持全球华人在中国和美国的慈善行动。GCPI 由亚美公义促进中心--洛杉矶 (Asian American Advancing Justice)，加州大学洛杉矶分校罗斯金学院 (Los Angeles, UCLA Luskin School of Public Affairs) 和加州大学尔湾分校-梁氏中美研究院 (UC Irvine Long China-US Institute) 共同合作进行。梁仕源和梁秀莲梁家族基金会 (John and Marilyn Long Family Foundation) ，老牛基金会 (Lao Niu Foundation)，以及华莱士.H. 柯尔特基金会(Wallace H. Coulter Foundation) 都对 CGPI 提供了鼎力支持。 另外，此项目还获得了由 UCLA 邻里知识中心，née 社会不平等研究中心 （UCLA’s Center for Neighborhood Knowledge – née Center for the Study of Inequality）和公民社会中心 (Center for Civil Society) 提供的资金和技术协助。同时，郭志明 (Stewart Kwoh)，梁仕源 (John Long)和阿尔奇. 克莱恩高纳德 (Archie Kleingartner) 担任了 GCPI 执行委员会的职务。多年的研究计划包括四个主要阶段：通过处理次级资料和现有文献来发展基础知识；经由对于慈善事业，民间社会和关键部门的社会科学研究，获取一级资料来开发新的知识；评估案例研究，以探讨慈善事业的社会，政治和经济影响；将研究成果转化为具有帮助性的学识来改善慈善政策，项目和实践。GCPI 的主要目标是发布一项严谨的，学术性的慈善行为研究，积极拓展双边对话，宣传慈善意识，并借由此项成果为慈善家，基金会，企业捐赠，社区组织，教育工作者，媒体，决策者和公众提供帮助。

初始研究阶段（针对发展基础知识）的课题主要负责人由邓道明 (Paul Ong) 教授担当。同时，这一跨领域的研究小组中包括来自台湾的王丽容 (Lillian Wang)，中国大陆的冯天丽 (Tilly Feng) 和美国的杰夫.瓦瑟斯特伦 (Jeff Wasserstrom) 等多位教授。 不仅如此，中国和美国大学的多位博士助理也参与其中。 西尔维娅.冈萨雷斯 (Silvia Gonzalez) 担任此项目经理。 本研究阶段的宗旨是发展出一个对于中国慈善事业的规模，形式，轨迹的整体性了解， 以及一个用于指导后续具有原始性，评估性和转化性的研究的理论框架。研究人员利用了两种方法：一、学术整合现有文献；二、研究二级说明性数据。研究采用比较中国大陆，台湾，香港和新加坡这四个主要华人社会的方法进行研究。在可行的情况下，研究人员在分析过程中会运用原始一级资料。（该 GCPI 的另一个组成部分涵盖了在美华人的慈善事业， 并拥有自己的系列出版物。）初始研究项目的一个重要目标是发布一份研究性文件， 讨论以下五个题目：侧重于研究潜在引导因素的文献研究；数据可用性的评估；中国慈善事业处于早期和 20 世纪的历史；高等教育慈善事业的案例研究；对慈善事业在环境领域所起作用的宏观分析。这些学术性研究的成果将用于鉴定研究 GCPI 第二阶段可能的一级研究课题。 GCPI 的第二阶段研究将由加州大学洛杉矶分校-罗斯金公共事务学院 (UCLA Luskin School of Public Affairs) 临时性院长，洛伊斯.高桥 (Lois Takahashi) 教授主导。

Table of Contents

Figures and Tables

Introduction

Most cultures have a concept of philanthropy: to care for or help others in need by donating money or time. Philanthropy can create social change and is influenced by family, religion, government, and the market. This literature review explores the relationship among philanthropy, charity, and civil society. We examine philanthropy in the United States based on existing literature, published reports, and secondary statistics. This working paper is one of three literature reviews. For a broader overview, the reader can consult the other two literature reviews for information on (1) philanthropy in China and (2) comparing philanthropy in China, Taiwan, Hong Kong, and Singapore.

The first part of the paper is a brief history of philanthropy in the United States, followed by a discussion of civil society organizations (CSOs) and the role of government. The second part delineates a broad range of donors, volunteers, and recipients. Part 3 examines factors that influence philanthropic engagement, drawing on studies from social science disciplines. Foundations fund programs and policies to bring about social change, particularly to address economic inequality, which is explo red in Part 4. The final section of the paper reviews emerging trends in philanthropy. This working paper does not cover Chinese American philanthropy, which is examined by another component of the Global Chinese Philanthropy Initiative.

What Is Philanthropy?

Like many other concepts, philanthropy has multiple definitions. For this paper, we adopt the definition that philanthropy is benevolent behavior, in the form of charitable acts (Andreoni, 2000). These acts typically are (1) giving (or donating) money or assets and (2) volunteering time and assistance for no payment.

Many make a distinction between philanthropy and charity. According to Acs (2013), philanthropy and charity are related, but are two separate things. Typically, philanthropy refers to wealthy residents making contributions to help the needy or disadvantaged (Spero, 2014). By contrast, charity is alleviating human suffering and reducing poverty, hunger, and disease (Spero, 2014). The difference between the two could be conceptualized as, for the former, addressing the structural sources of issues versus, for the latter, taking action to address symptoms. Acs wrote, "Philanthropy necessitates a reciprocal relationship between the philanthropist and the beneficiary. Charity requires no such reciprocal relationship" (Acs, 2013, p. 4). Philanthropy has a redistributive aspect to it (Rogers, 2013).

For our purposes, we include charity in our definition of philanthropy, but draw a distinction between social change philanthropy and charitable philanthropy. Philanthropy in the issue area of environmental sustainability can be a good example illustrating this difference. Herzog and Price (2016) study giving in America and include a brief discussion of what they call "sustainability giving" (p. 53). Spending more or paying a higher price for products that are produced more sustainably is an example of what we might define as charity philanthropy. People might also donate to specific environmental causes, like cleaning up a beach or protecting a certain species of animal. These would be defined as charity philanthropy because they entail personal actions directed at immediate effects or symptoms of greater environmental problems.

Social change philanthropy we would define as actions directed toward political or institutional change. These actions are directed at the "root causes of social ills" to promote social change, as Spero (2014, p. vii) writes. Philanthropy can also be religious in nature. All major religions include some concept of charity or service (Lindenmeyr, 1990 as cited in Spero, 2014) and in the United States, philanthropy was, historically, primarily religious (Putnam, 1995). The desire to give back to the community is linked to religious or ethical convictions to better society as a whole (UBS-INSEAD, 2011).

The emphasis of this report is not religious-based philanthropy. Instead, this report explores the relationship between forms of philanthropy and civil society. The concepts are universal, but we focus on the United States. This working paper is one of three literature reviews. For more detailed information on philanthropy in China and other regions in Asia, the reader may consult the other two papers in this series.

Brief History

Since the Middle Ages, European villages and towns experienced population changes, shifts toward agrarian society, and natural disasters that led to famine and poverty (Piven and Cloward, 1971). As feudalism evolved into capitalism (wage labor), poverty increased (Handler and Hasenfeld, 1997) and urbanization and manufacturing grew (Piven and Cloward, 1971). Piven and Cloward (1971) wrote, "Since the early sixteenth century, many Western governments have come to make provision for the care of the destitute, often known as poor relief" (p. 5). This relief was designed as a labor-regulating function to mediate mass unemployment and assist the aged, disabled, insane, and others (Piven and Cloward, 1971).

Before 1750, philanthropy in Colonial America was heavily influenced by the English "heritage of self-governing corporate institutions" (Hall, 2006, p. 33). Responsibilities for charitable activities and facilities and programs for the poor were carried out by different governmental units across the colonies—for example, in Virginia these responsibilities fell on the parish level government whereas in New England's larger cities they were under the jurisdiction of municipal government (Hall, 2006). At this time, embryonic forms of private American philanthropy also began to appear in the form of bequests and grants. The primary recipient of this type of giving tended to be government—for example, gifts toward establishing the "public corporation" colleges of Harvard, William and Mary, and Yale (Hall, 2006, p. 34).

In the early years of the United States (1750–1800), "indigenous philanthropy and voluntarism" remained "embryonic" (Hall, 2006, p. 36). However, the period did see a growth in voluntary associations and in religious groups. By 1800, "conditions of political and economic life in early America" began to compel people to "embrace them" (Hall, 2006, p. 36). At this time, associations began to act as conduits for giving, with religious associations playing an increasingly important role in spreading a culture of giving (Hall, 2006). In this period, the "legal and regulatory" framework for dealing with these associations began to mature. Treatment of such associations differed on a state-by-state basis, but largely fit into one of two categories: "broad construction" states viewed "virtually any kind of not-for-profit associational activity" as charity and encouraged these activities through tax exemptions; "narrow construction" states required associations to pass a litmus test for charitable, "redistributional and noncommercial intent" in order to be considered for tax-exempt status (Hall, 2006, p. 37). By the 1830s, fundraising as we recognize it today began to emerge as institutions started to "actively solicit contributions and bequests" for their various causes (Hall, 2006, p. 39).

Hall (2006) writes that in this early period of American history a "majority of the work of caregiving, healing, educating, and even worshipping took place in the primary institutions of the family and community" (p. 39). However, with economic and societal changes arising in the latter parts of the nineteenth century, the "ero[sion] of traditional communities and family ties" drove Americans to more willingly embrace "new kinds of formal organizations" (Hall, 2006, p. 39). Philanthropy was increasingly shaped by and directed at the major issues of the time.

In the Civil War period, slavery was a central issue that stimulated the growth of "national and local organizations" and "philanthropic contributions to promote emancipation and aid emancipated slaves" (Hall, 2006, p. 40). Following the Civil War, the Reconstruction Era saw the growth of philanthropy and activist groups as the "failure of Reconstruction and the brutal political and economic repression of blacks" created a "powerful impetus" among Americans to respond (Hall, 2006, p. 43). At this time, there was also a growth and expansion in black churches, creating opportunities for community building and civic engagement among the black community (Hall, 2006, p. 43). Mass immigration marked the next major historical period. Perceived social disorder brought on by new waves of immigration in the early twentieth century led to a reform response that involved, to varying degrees, elements of social control. This time also saw the growth of social welfare policy as an area of full-time occupation and in the growing role of women in "the new activism" that was emerging (Hall, 2006, p. 44).

In the period between 1920 and 1945, philanthropy became oriented toward responding to "moderating the excesses of capitalism" while also "expanding its reach into every aspect of public and private life" (Hall, 2006, p. 48). This period of "Welfare Capitalism" combined philanthropic motivations with scientific management and business economics. In the postwar period, Hall (2006) writes that there is a growth in foundations and charitable giving among the wealthy. As a result of changing budgetary and oversight practices in government and "steeply progressive" tax rates, the wealthy had greater "incentives

for tax avoidance" (Hall, 2006, p. 51). Between 1939 and 1950, Hall observes that the number of "full or partially exempt entities more than doubled" and that "between 1950 and 1968, the number of charitable tax-exempts increased more than twenty-fold" (Hall, 2006, p. 51). Following this period, the changing role of the United States and the "transformation of the politics of public finance" were key factors affecting the philanthropic landscape (Hall, 2006). The rise of the United States as a leader in the world informed the agendas of many groups toward promoting civil rights issues, and changes in tax policy saw nonprofits becoming "favored recipients" of subsidies and becoming increasingly included in the fold of public governance (Hall, 2006, p. 53). Today, in an era of increasing globalization, the rise of global nongovernmental organizations (NGOs) has the potential to shape the American nonprofit landscape.

In American society, philanthropy and altruism are long, distinguished traditions (Putnam, 1995). Putnam (1995) wrote, "Both philanthropy and volunteering are roughly twice as common among Americans as among citizens of other countries" (p. 117). In the United States and other countries with advanced economies, philanthropy is "embedded in the everyday lexicon." Requesting donations of time or money is not a "dirty word" (Kapoor & Tewari, 2010, p. 9). There is no hesitation, tentativeness, or embarrassment to ask for donations but instead a source of pride to raise funds for a cause (Kapoor & Tewari, 2010, pp. 9–10).

However, outside of the United States and Europe, the tradition of funding nonprofit organizations (NPOs) to implement programs is not yet common (Ton, 2014). In countries with emerging economies, the infrastructure to engage in philanthropy is not as mature. For this report, countries with emerging economies include Brazil, Russia, India, China, and South Africa (BRICS) and Mexico, Indonesia, Nigeria, and Turkey (MINT). Due to the accumulation of wealth from the Industrial Revolution, philanthropy and volunteering have become more organized and professionalized (Putnam, 1995).

Civil Society and Philanthropy

Civil society is the critical arena for philanthropic activity. It includes the interactions between the private sphere (individuals, families, and communities) and institutions that include the government, business, and religion (see Figure 1). Anheier (2006) describes civil society as "the sum of institutions, organizations, and individuals located between the family, state, and market in which people associate voluntarily to advance common interests." The purpose of these interactions is to organize society, to execute the interests and will of the citizens, and to promote civic values.

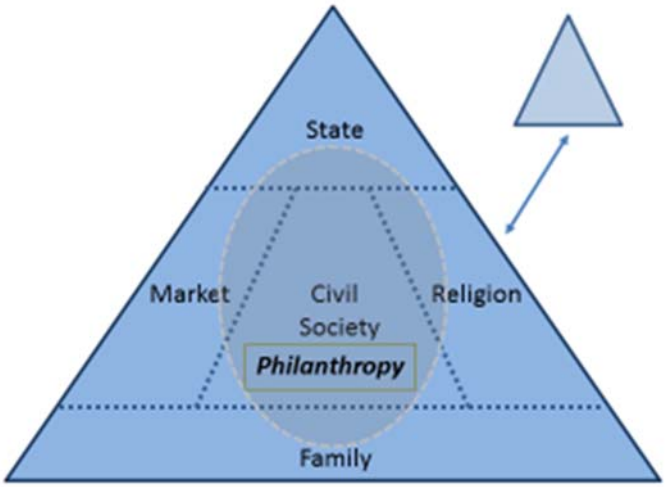
In order to situate civil society, society as a whole can be conceptualized as being divided into three sectors for the production of goods and services. The first sector is the government or the state; private market/businesses form the second sector; with nongovernment, nonprofit, religious, and other CSOs forming the third sector. Although the primary purpose of CSOs is to carry out philanthropic activities, individuals and groups from all sectors engage in philanthropy. Here, civil society also functions as forum to influence government and business, through advocacy and protest.

According to the United Nations, civil society is comprised of CSOs and NGOs. These types of organizations are defined in the next section. The World Bank describes the civil society as comprised of "non-governmental organizations (NGOs), faith-based groups, trade unions, indigenous people's organizations, community groups, and foundations, among others" (World Bank, 2015).

Organizations from all three sectors are involved in philanthropy. As Acs (2013) explained, "Institutions are important because they set the rules of the game and determine the incentives structure that influences our behavior" (p. 14). Government agencies provide oversight and implement policies and procedures; furthermore, they can directly fund and administer programs. Private businesses fund philanthropic causes

both domestically and internationally. There are private (family), corporate, and community foundations that are nonprofit (third sector) entities established to carry out charitable purposes on behalf of an individual, family, or corporation. Individuals can donate money, assets, and time. In addition, individuals can bequest money upon their death (Clotfelter, 1997) or establish a charitable trust (in which a portion of one's estate is designated for philanthropic purposes after they pass away).

Figure 1: Civil Society and Philanthropy



Source: Designed by Ong, 2014

In the United States, the third sector is called the nonprofit sector, because many NGOs register with the Internal Revenue Service (IRS) for the tax-exempt 501(c)(3) status to become a NPO. An NPO with tax-exempt status does not earn profits or dividends, but instead uses surplus revenues to achieve its charitable purpose or mission.

Civil Society Organizations

The terms NGOs and CSOs are commonly used interchangeably. NGOs are part of the third sector; they function separately from the first sector (government/the state), as they are nongovernmental, and from the second sector (the market) as they are not a private business. CSOs are a type of NGO that are involved with philanthropy, charity, social change, or civic engagement. NGOs and NPOs are often confused to be the same type of organization. Not all NGOs have the state-registered tax-exempt status (see Table 1); however, all NPOs are NGOs (because they are not government entities). NGO is an umbrella term to encompass NPOs and other types of nongovernment organizations, such as community-based, grassroots, religious, education, and informal organizations.

According to the Yearbook of International Organizations, the number of international NGOs increased from 6,000 in 1990 to more than 66,000 in 2012 (World Bank, 2015). Heurlin (2010) stated, "Non-governmental organizations (NGOs) have emerged as an important non-state actor in the second half of the twentieth century" (p. 222). The Organization for Economic Cooperation and Development estimated that in 2011, US$19.3 billion in official development assistance was channeled through NGOs (World Bank, 2015). NGOs have also demonstrated an increased influence and ability to shape global development assistance and public policy during the past two decades (World Bank, 2015). The World Bank (2015) stated, "This dynamism is exemplified by successful advocacy campaign movements that

have mobilized thousands of supporters around the world on issues such as poverty reduction and climate change."

Table 1: Major Types of Civil Society Organizations

Civil Society Organizations (CSOs)	Tax Exempt Status	Formal/Informal
Nongovernment Organizations (NGOs)	Maybe	Varies
Nonprofit Organizations (NPOs)	Yes	Formal
Community-Based Organizations (CBOs)	Maybe	Varies
Grassroots Organizations	Maybe	Varies

Source: By authors, 2016

There are many different CSOs that fall along a spectrum of formal and informal entities. Formal organizations are structured with the intention of longevity and financial sustainability. Typically, these organizations may have a leadership structure, staff, a budget, and formal bylaws and policies. Most formal organizations are state registered, operating within the government tax requirements. For these formal CSOs, one of their principal tasks is to receive and use donations made by individuals. This sector constitutes about 10 percent of the economy (Clotfelter, 1997).

As of 2013, the number of U.S. nonprofit public charities with the IRS tax status of 501(c)(3) was approximately 1.05 million (Lilly Family School of Philanthropy at Indiana University, 2014). According to Smith (2010), "In specific service categories such as social services, the number of nonprofit organizations has almost doubled between 1995 and 2009 (NCCS, 2009a)" (p. 622). Types of NPOs include:

- Corporate Foundations
- Business Associations
- Trade or Labor Unions
- Private Foundations
- Family Foundations
- Community Foundations
- Family Trusts
- Religious Organizations (churches, temples, synagogues, etc.)
- Educational Organizations (schools, colleges, universities, etc.)

Some scholars include religious and educational organizations as CSOs. Because our research does not focus on these institutions, we excluded them from our major types of CSOs. community-based organizations (CBOs) and grassroots organizations range from formal to informal entities. CBOs and grassroots organizations may or may not have the nonprofit tax-exempt status. CBOs are grouped spatially (by a specific neighborhood or geographic area) or socially (by a demographic characteristic or common interest). Grassroots organizations start out with volunteer workers who mobilize on a local level. Informal CSOs may consist of friends who trade labor or share material items (e.g., carpooling or sharing home grown food), families who pool their resources together for a common purpose (e.g., to start a business or buy a home), neighborhood groups that organize for an event (e.g., a holiday party or park clean-up), and so forth. These informal groupings and associations are not the focus of our research.

The Role of Government

The state has a responsibility for the well-being of its citizens and to provide public goods for the collective benefit. Other responsibilities include providing domestic and international security and regulating individuals, corporations, and institutions. Historically, there have been many government policies and programs to reduce and alleviate poverty. Some argue the role of government is to be a "the welfare state" to offer services for the needy.

Tax Policies

The government has the ability to both tax citizens and to fund programs that can aid others, or government can act as a form of social control. Musgrave (1983), a German author, wrote about public finance and taxation saying, "Public provision, and the goods which are to be included, does not rest on society's desire to override individual preferences, but to implement them" (p. 6). This theory of public finance incorporates group interaction and is similar to the Weberian tradition (Musgrave, 1983). Most public-serving fiscal decisions are dependent on models of representative democracy, with taxation and transfer payments being the dominant instruments of the welfare state (Musgrave, 1983). The state can design taxation for the purposes of redistribution and stabilization (Musgrave, 1983).

The neoclassical model of the 1950s promoted the government's role of fiscal stabilization to control employment, growth, and foreign balance (Musgrave, 1983). Musgrave advocated for a fair tax structure and equitable tax base; however, the differentiation among people with unequal capacity often results in horizontal and vertical equity.

In the United States, relief-giving is known as public assistance or the public welfare system (Piven and Cloward, 1971). Some believe that relief-giving is a method to regulate the political and economic behavior of the poor (Piven and Cloward, 1971). Welfare policy was established in the United States to maintain "moral order—the work ethic and family, gender, race, and ethnic relations" (Handler and Hasenfeld, 1997, p. 11). Piven and Cloward (1971) wrote, "Historical evidence suggests that relief arrangements are initiated or expanded during the occasional outbreaks of civil disorder produced by mass unemployment, and are then abolished or contracted when political stability is restored" (p. xiii).

These authors noted two major relief explosions in the United States: during the Great Depression of 1930s and also during the affluent but tumultuous years of the 1960s, in the Civil Rights era (Piven and Cloward, 1971). As part of the capitalist system, there are economic downturns or depressions (Piven and Cloward, 1971). According to Handler and Hasenfeld (1997), "Poverty is caused primarily—not exclusively—by the deterioration of the low-wage labor market" (p. 11).

In addition to funding and administrating social service programs, the U.S. government has a tax policy to provide deductions for donations to nonprofit and charitable organizations. In 1917, the U.S. tax code was modified to allow taxpayers to deduct their charitable donations from their taxable incomes (Andreoni, 2000). One of the drawbacks of tax deductions for donors is that government's resources are reduced to directly provide assistance or fund programs. Dasgupta and Kanbur (2011) explained how: "Rich individuals voluntarily donate for the provision of public goods" (p. 1). Examples of these public goods include "places of worship, ethnic festivals, literary and cultural activities, sports clubs, civic/neighborhood amenities (including parks, museums, theatres, community halls, and libraries, to name a few), facilities for scientific research, etc." (Dasgupta and Kanbur, 2011, pp. 1–2). According to Dasgupta and Kanbur (2011), poor individuals often benefit from these public goods without having to incur any major expenditure (they are "free riders"), while rich donors claim large tax deductions (p. 2). The wealthy benefit from these tax deductions—this effectively reduces the resources available for low-income persons or direct redistribution efforts (Dasgupta and Kanbur, 2011).

Welfare Programs and Civil Society

The boundaries that separate the state and NGOs with respect to welfare programs are dynamic and often "fuzzy." This relationship can range from interdependent to combative, and it changes depending on the time period and circumstances. Early welfare programs were designed to help poor children and workers. In the nineteenth century, the focus was to assist poor single mothers and their children. For example, there were programs to help Civil War orphans (Handler and Hasenfeld, 1997). Some of these government programs imposed specific "family values" and may have been created as a form of social control on teen pregnancies and single mothers (Handler and Hasenfeld, 1997). As a result of the White House conference in 1909, a program was established to provide aid to single mothers with dependent children (Handler and Hasenfeld, 1997). This program, which began with social values implications, evolves in later periods with socioeconomic consequences.

The Great Depression marks another period of growth in state-led welfare programs. During this period programs were created for both direct relief and work relief. These programs included the Federal Emergency Relief Administration (later known as the Works Progress Administration), Civilian Conservation Corps, and the Public Works Administration. These programs and agencies created more than 4.26 million public jobs (Handler and Hasenfeld, 1997). Anheier and Hammack (2010) explains the increase in federal funding for domestic programs during the 1930s and 1940s. A major program born in this New Deal Era was the American Social Security Act of 1935, creating the national retirement system (Handler and Hasenfeld, 1997). The federal government established unemployment insurance (Handler and Hasenfeld, 1997). Before the New Deal, federal government funding had been almost entirely absent from health care, education, and social services. Today, the federal government directs at least 5 percent of the entire U.S. economy toward work in those fields (p. 22).

During World War II and the early years of the Cold War, there was a transformation of American's health, education, and welfare systems (Anheier and Hammack, 2010). Medicare and Medicaid were established at this time. The Servicemen's Readjustment Act of 1944, known the G.I. Bill, provided a range of benefits for the huge numbers of returning World War II veterans or "G.I.s." After World War II, the U.S. government expanded into other roles related to poverty, the women's movement, and the African American civil rights movement (Anheier and Hammack, 2010). In the 1970s and 1980s, government agencies providing poverty relief preferred to fund voucher, voucher-like, and loan programs (Anheier and Hammack, 2010). Anheier and Hammack (2010) explained, "This change enabled patients, the disabled, the elderly, students, and others to act more like consumers in a marketplace and significantly increased public support for federally funded programs" (p. 20).

In the latter decades of the twentieth century, major developments in the area of welfare and civil society include new programs for relief and also more critical evaluations of the socioeconomic consequences of policy. In 1975, the Earned Income Tax Credit program provides wage subsides or tax relief for low-income individuals and households (Handler and Hasenfeld, 1997). Other programs include fair labor acts, raising the minimum wage, subsidizing child care, enforcing child support, providing health care, administrating disability insurance programs, and offering employment training and placement services.

The program that began in 1909 to aid single mothers with dependent children became known as Aid to Families with Dependent Children in 1962. Its name changed again in 1996 and the program is known today as Temporary Assistance for Needy Families. These programs and their design, in part, may have caused participants to become dependent on welfare for generations (Handler and Hasenfeld, 1997). The welfare program requirements produced disincentives for single mothers to work. The Work Incentive Program of 1967, Family Support Act of 1988, and Personal Responsibility and Work Opportunity

Reconciliation Act of 1996 (H.R. 3734) mandated new requirements for able-bodied welfare mothers to work (Handler and Hasenfeld, 1997). These are known as welfare-to-work programs.

In the past three decades, changes in welfare policy have reshaped the relationship between the state and NGOs. The U.S. governmental devolution movement has shifted the responsibility of many public services to state and local government and NPOs (Behn, 2001; Hood, 1991; Kettl, 2005; Osborne and Gaebler, 1992 as cited by Smith, 2010). Not only has there been an increased "market orientation in the delivery of public services to improve efficiency and effectiveness," but there has also been an increased reliance on nonprofit (and for-profit) organizations funded with government contracts (Nathan, 1996 as cited by Smith, 2010, p. 622).

Furthermore, many state and local governments lacked the capacity to deliver quality services, and therefore, turned to nonprofits to provide "expanded social welfare services including community care, home care, welfare-to-work, low income housing, and substance abuse treatment" (Allard, 2009; Gronbjerg, 1993; Smith and Lipsky, 1993, as cited by Smith, 2010, p. 622).

It should be noted that the shifting boundaries between the state and civil society (and NGOs) is embedded in a larger ideological debate. The conflict between big and small government has been an American debate since the New Deal and the Great Society (Acs, 2013, p. 7). It is a tension of values—between traditions of rugged individualism and self-reliance and charity—fueling debates over concerns for alleviating the suffering of those less fortunate and holding people accountable. Acs (2013) examined whether, after the Great Recession of 2007–2009, the United States should be like Europe with more government involvement in the marketplace (Acs, 2013, p. 7). Acs noted that "[c]apitalism requires the interplay between individuals and government—between commerce and control" (2013, p. 8). More recently, U.S. politicians and voters have been resistant to higher taxes and more expansive government in industry and society (Acs, 2013, p. 13). Anheier and Hammack (2010) acknowledged that "there can be no alternative to using the regulatory and funding capabilities of government if society is to make progress toward improving health, the environments, or opportunity for all" (p. 25).

Relationship to Civil Society Organizations

Government provides direct grants to charities and provides tax incentives for NPOs. Conversely, at times, the government is a recipient of philanthropy to administer social service programs. CSOs are the primary recipients of philanthropic funding and are seen as an integral part of the political system (Spero, 2014). Both public and private international giving supports a variety of CSOs that focus on human rights, environmental issues, and economic development (Spero, 2014).

In the United States and in many advanced economy countries, the government is an active partner with private donors in funding the charitable sector (Andreoni, 2000, pp. 11369–11370). Spero (2014) stated, "Although the role of civil society varies from country to country, civil society organizations in the developed world are seen as a legitimate way for citizens to have a voice in government and the economy" (p. 15).

The government or state has different types of relationships with CSOs. These relationships, which are not mutually exclusive, can be categorized as:

1. Regulatory—the government provides oversight and incentives for CSOs;
2. Complementary—the government and CSOs provide similar, but different programs and services;
3. Supplementary—the government and CSOs provide the same services;

4. Substitute—the government and CSOs provide different services; and
5. Conflicted—the CSOs are created to critique or challenge the government.

CSOs benefit from government involvement through a perceived sense of legitimacy, tax benefits, and financial benefits (Andreoni, 2000, p. 11375). A government grant may be viewed as a "stamp of approval" for the CSO or "seed money" for a project (Andreoni, 2000, p. 11375). However, government funding may create a perception that the CSO is in less need of private donations, which is known as the "crowding out" hypothesis (Bergstrom et al., 1986; Roberts, 1984; Warr, 1982 as cited by Andreoni, 2000, p. 11375). As government has increasingly taken the primary responsibility for support of the poor, donors have been giving larger shares toward other activities, such as education, health, and cultural institutions (Clotfelter, 1997, p. 5).

Who Gives, Volunteers, and Receives

This section discusses who gives to CSOs, who volunteers with CSOs, and what types of CSOs receive funding. We discuss the types of donors, amounts typically donated, and the characteristics of individuals who donate. This section also summarizes the most common types of donation recipients.

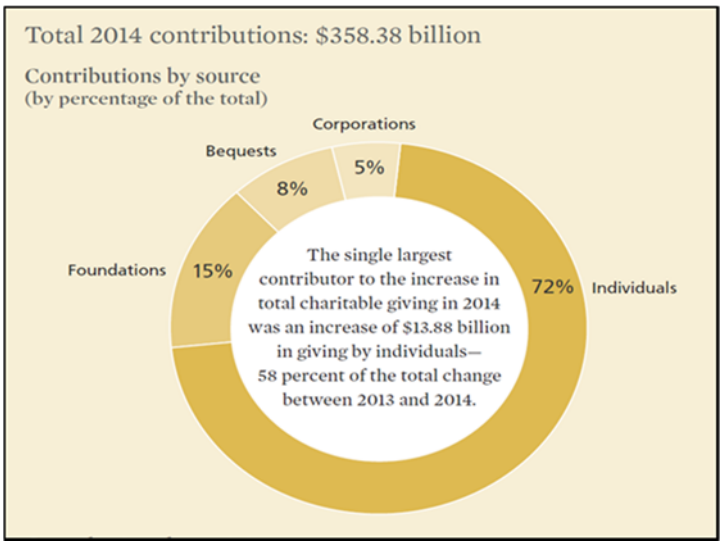
Authors Cnaan, Jones, Dickin, and Salomon (2010) reviewed the three most common sources of data in the United States regarding giving and volunteering. Cnaan et al. noticed that each source defined giving and volunteering slightly differently (Cnaan et al., 2010, p. 499). Cnaan et al. acknowledged the distinction between formal and informal giving and volunteering. As stated earlier, formal giving and volunteering are with state-registered organizations that operate within the government tax and policy requirements. Informal giving and volunteering is "outside the auspices of formal organizations" (Cnaan et al., 2010, p. 500). For example, informal giving could be giving money to someone who is homeless and walking on the street (Cnaan et al., 2010). Informal volunteering could be helping a friend move to a new home. The Center on Philanthropy Studies provides respondents with a "purist definition" of volunteering and asks respondents to include only "activities for which people are not paid, except perhaps expenses" (Cnaan et al., 2010, p. 500). For their research, Cnaan et al. provided multiple choice options to enable respondents to recall incidents of giving and volunteering.

The Charities Aid Foundation's (CAF) World Giving Index 2014 report included international research in 135 countries conducted by the market research firm, Gallup (Charities Aid Foundation, 2014). This index polled participants about whether in the past month, they had donated money to a charity, volunteered time to an organization, or helped a stranger or someone they didn't know who needed help (Charities Aid Foundation, 2014, p. 4). The United States was the only country to be ranked in the Top 10 for all three of the charitable giving behaviors in the World Giving Index: helping a stranger (1st), volunteering time (5th), and donating money (9th) (Charities Aid Foundation, 2014, p. 5). Myanmar ranked the highest in the giving index with 91 percent of people donating money, which reflects the country's strong Theravada Buddhist and monk community (Charities Aid Foundation, 2014, p. 5). According to CAF, "Of the fifteen countries showing the largest increase between their 2013 giving score and their five-year average score, only one is classified as a high income country by the World Bank, clearly demonstrating the greater potential for growth in nascent markets" (Charities Aid Foundation, 2014, p. 5).

Donors

The Lilly Family School of Philanthropy at Indiana University's (2015) Giving USA 2015 report found that Americans donated an estimated $358.38 billion to charity in 2014, surpassing the peak last seen before the Great Recession (The Giving Institute, 2015).

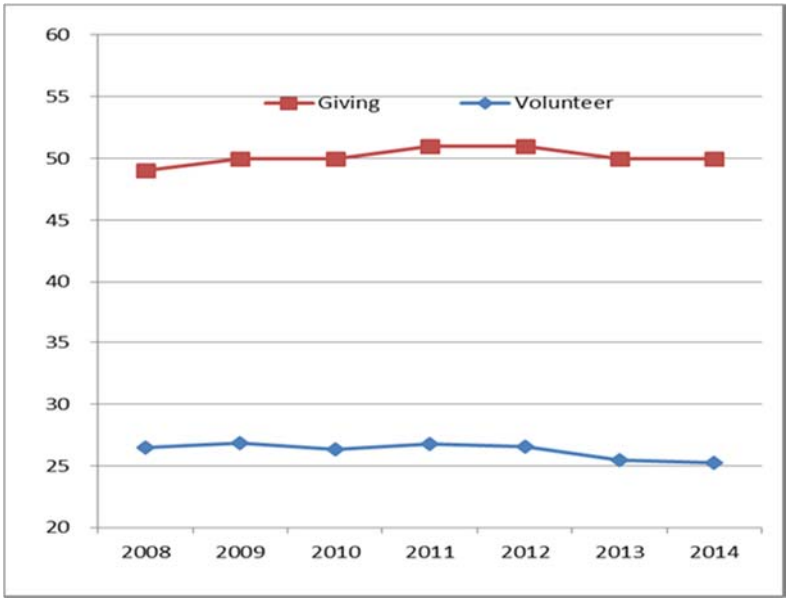
Figure 2: Household Giving, 2014



Source: Lilly Family School of Philanthropy at Indiana University (2015); Giving USA 2015: Highlights

The majority of these donations were from individuals (72 percent or $259 billion), followed by foundations (15 percent or $54 billion), bequests (8 percent or $28 billion), and corporations (5 percent or $18 billion) (see Figure 2). Laskowski (2011) predicted from 1998 to 2052, $6 trillion of a $41 trillion intergenerational wealth transfer would make its way to charity (p. 6).

Figure 3: Percent of U.S. Population That Gives and Volunteers, 2008–2014



Source: Current Population Survey September Volunteer Supplement, 2008–2014; tabulated by Silvia Gonzalez and Paul Ong, 2015

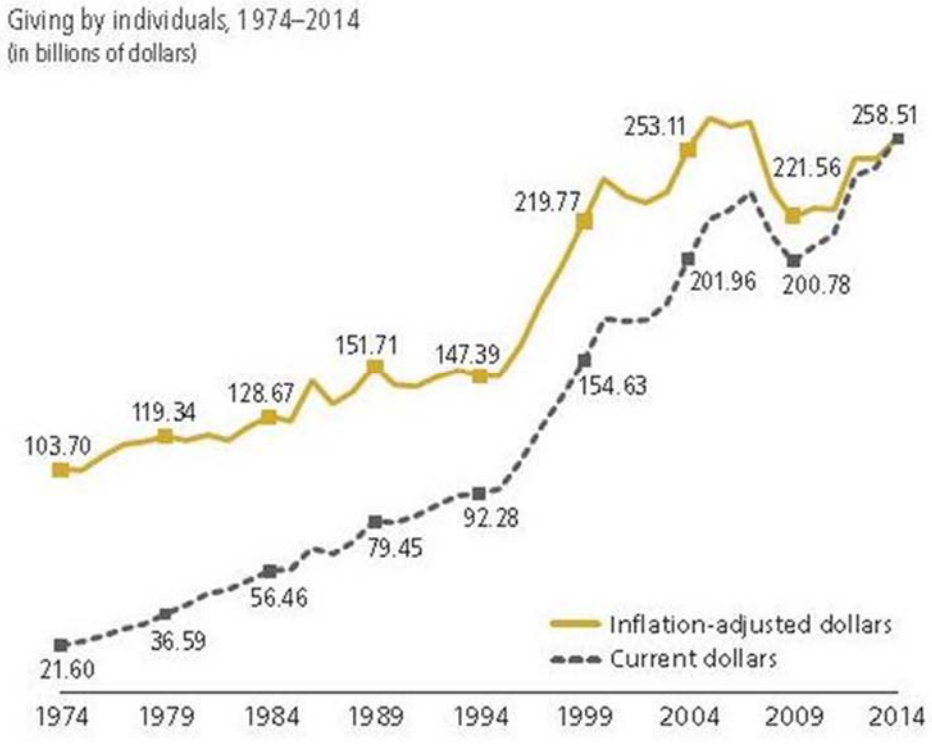
More than half of the U.S. population volunteers (Figure 3). From 2008 to 2014, the percentage of the U.S. population that donated funds was between 49 and 50 percent (Current Population Survey September Volunteer Supplement, 2008–2014). The percentage of the U.S. population that volunteers ranged between 25 and 27percent from 2008 to 2014.

Individuals

Since 1974, the total amount of giving by individuals in the United States has increased every year with the exception of 2008–2009, due to the recession. According to the Giving USA 2015 Report, individual giving peaked in 2006, dropped to $221.56 billion inflation-adjusted dollars in 2009 (see Figure 4), and has not fully recovered to the peak level (National Center for Charitable Statistics, 2015).

Giving USA 2015: Highlights stated, in 2014, "Per capita giving by U.S. adults reached an average of $1,050 and average U.S. household giving reached an average of $2,030" (Lilly Family School of Philanthropy, 2015). In 2010, Cnaan et al. asked U.S. respondents about their charitable contributions over the past year (p. 509). From 2006 to 2008, 71 percent to 79 percent of the respondents gave charitable contributions annually with a holiday season spike in donations (Cnaan et al., 2010, p. 516). Approximately one-third of households that donate gave less than US$250 per year and about 9 percent of households gave more than US$10,000 annually (Cnaan et al., 2010, p. 518). In August 2008, this percentage dropped significantly to 2 percent, a possible indication of the economic meltdown (Cnaan et al., 2010, p. 518).

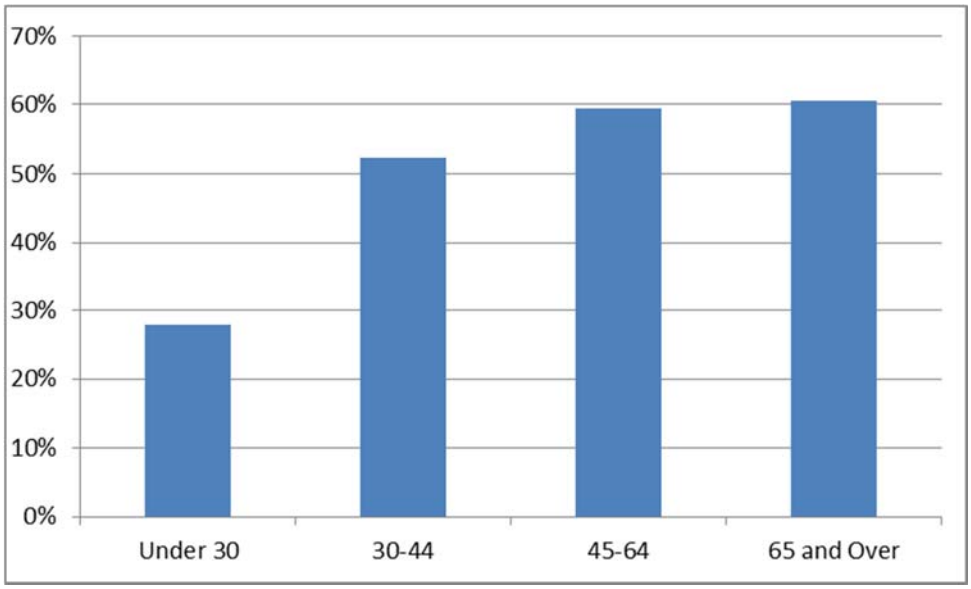
Figure 4: Giving by Individuals, 1974–2014



Source: Giving USA 2015: The Annual Report on Philanthropy for the Year 2014 and the National Center for Charitable Statistics (2015) Charitable Giving in America: Some Facts and Figures

Several authors identified characteristics of American donors: they tend to be older, more educated, and with higher income (Andreoni, 2000). From Clotfelter's (1997) review of econometric models of charitable giving, the following variables were related to giving: age, marriage, presence of children, and home ownership (p. 19). Furthermore, he acknowledged the interdependence of giving behavior among friends, neighbors, and business associates (Clotfelter, 1997, p. 27). Putnam (1995) also noted how religious affiliation and engagement influences philanthropic behavior. Half of all charitable giving in America is religious in nature. Herzog and Price (2016) observed "generosity inequalities" relating to gender, race/ethnicity, age, and education (Herzog and Price, 2016, p. 283). They found that giving behavior was gendered in several ways, including the form of giving, the approach toward giving, and in donation amounts, among other behaviors (Herzog and Price, 2016). Herzog and Price (2016) also found differences in giving behavior along racial/ethnic categories, especially in monetary donations and in the targets of giving. Differences in the nature of giving and in the targets of giving are also observed between age groups, with younger and older Americans being more likely to give and middle-aged interviewees being more likely to volunteer time (Herzog and Price, 2016). In their observations, Herzog and Price (2016) also found that approaches to giving differed and that educational attainment could be a predictor of the number of monetary donations.

Figure 5: Percent of U.S. Population That Gives by Age, 2008–2014



Source: Current Population Survey September Volunteer Supplement, 2008–2014 pooled data; tabulated by Silvia Gonzalez and Paul Ong, 2015

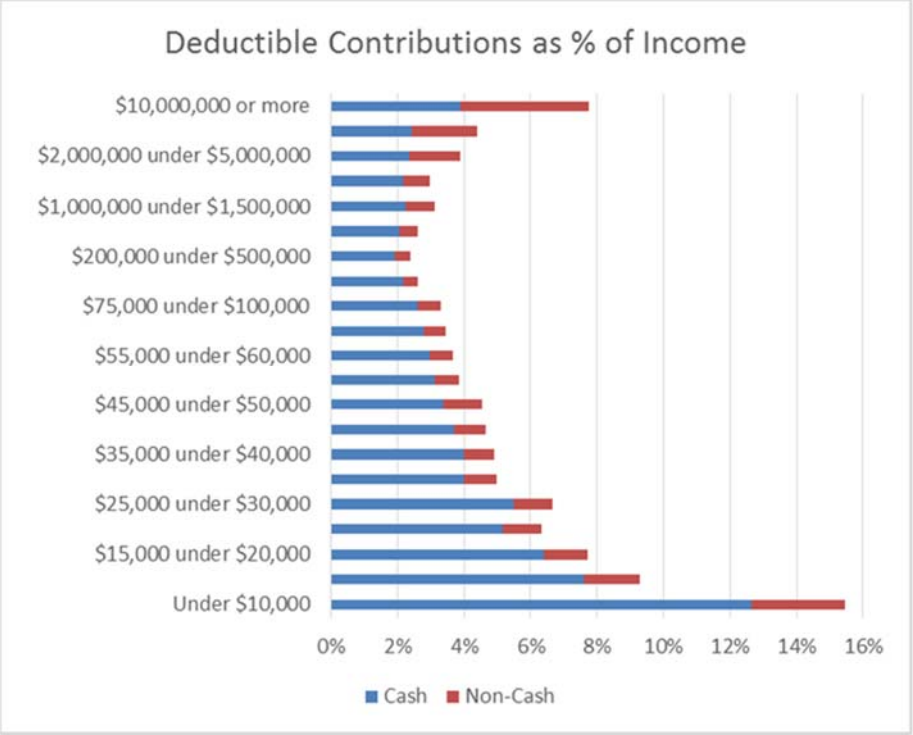
Figure 5 indicates that approximately 28 percent of younger persons under the age twenty donate, whereas more than 50 percent of persons over thirty tend to donate and nearly 60 percent of persons over forty-five donate (Current Population Survey September Volunteer Supplement, 2008–2014 pooled data). According to Andreoni, older persons (although it tapers off around for seventy-five and older) and more educated persons tend to give (Andreoni, 2000, p. 11371).

Andreoni observed a "U-shape" pattern between the relationship of income and the percentage of giving; low- and high-income persons give at higher percentages than middle-income persons (Andreoni, 2000, p. 11371). Andreoni offered a couple of explanations for this "U-shape" pattern. He suggested that those

with low incomes who give may be younger (who know their wages will be rising) and religious (Andreoni, 2000, p. 11371). The observed pattern of low levels of giving among middle-income Americans may also be a reflection of competing costs of living (child care, education, rent/mortgages, and so forth), which may suppress middle-income giving. Figure 6f illustrates this "U-shape" pattern with 2013 data from U.S. IRS State of Income data. It is important to note that the data summarized donations that are itemized in the IRS tax forms. Because many low-income persons do not itemize their donations, we do not know their rate and patterns of giving.

In comparing, nonpoor and poor Americans, Herzog and Price (2016) find that although poor Americans are more likely to not donate, the authors also find that giving among Americans in poverty "may be considered quite generous relative to giving by Americans not in poverty" (Herzog and Price, 2016, p. 44). Their analysis offers a slightly different way of considering the U-shape pattern revealed in IRS data. Herzog and Price (2016) argue that the burden of donating is higher for those in poverty and the relative rates of giving among the nonpoor and poor reveal the nonpoor as being relatively less generous than the impoverished.

Figure 6: Contributions by Income, 2013



Source: U.S. Internal Revenue Service, State of Income, 2013 prepared by Paul Ong and Elena Ong

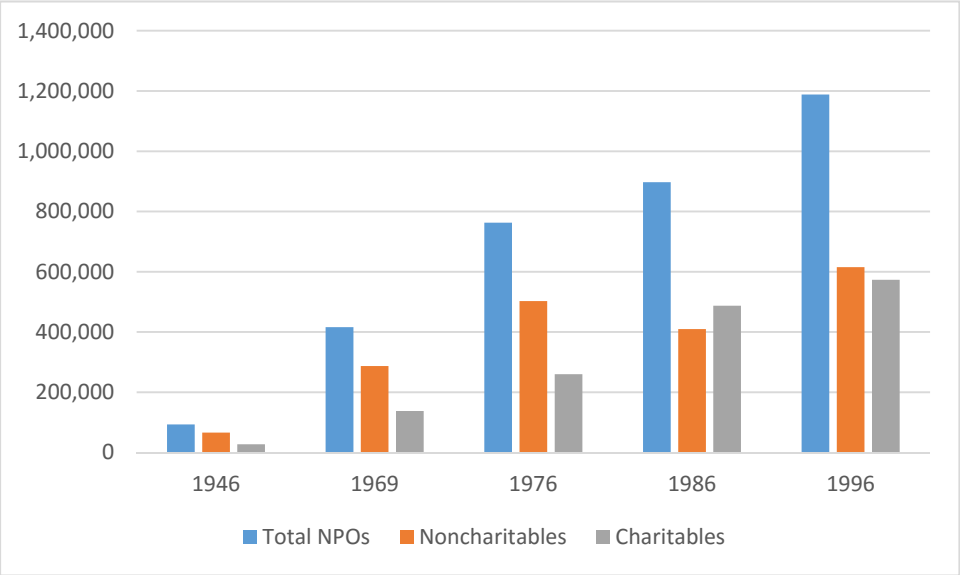
Tax filers with incomes more than $2 million donate about 4 percent or more of their income; tax filers earning $50,000 or less donate between 4 to 15 percent of their income. Those tax filers earning between $1.9 million and $49,000 donate less than 4 percent of their income. According to Putnam (1995), Americans are generous people, but have become less generous over time. Putnam wrote that philanthropy's share of American's income has fallen steadily for nearly four decades from the 1960s, entirely erasing the postwar gains.

Super-rich

Wealthy givers tend to donate appreciated assets, such as art, real estate, or stocks (Andreoni, 2000, p. 11374). Wealthy donors' giving is highly variable from year to year (Andreoni, 2000, p. 11375). Andreoni speculates, perhaps, the "super-rich save up their donations over a number of years in order to give bigger gifts when they do give" possibly to gain recognition from the charity for being a major donor (Andreoni, 2000, p. 11375).

Following the Civil War, a generation of new millionaires emerged from the period of rapid manufacturing and industrial growth. Andrew Carnegie and John D. Rockefeller Sr. were known as avid American philanthropists, who donated to both education and the arts. Carnegie's fortunes amassed from the American steel industry. Rockefeller established Standard Oil Company in 1870. Carnegie proclaimed in the 1889 essay "The Gospel of Wealth": "wealth was a sacred trust which its possessor was bound to administer for the good of the community" (Putnam, 1995, p. 117). Hall and Burke (2006) observe a growth in the number of NPOs since the mid-20th Century (see Figure 7).

Figure 7: Population of Charitable and Noncharitable NPOs, 1946–1996



Source: Hall and Burke 2006 (cited in Hall 2006)

More recently, entrepreneurial philanthropists have begun leveraging their funds and influencing others to give generously. In 1986, David Rockefeller and his daughter Peggy Dulany founded the Global Philanthropists Circle to bring together "wealthy individuals and families from a variety of countries in an effort to promote indigenous philanthropy" (Spero, 2014, p. 3). In 2010, Bill Gates and Warren Buffett created the Giving Pledge to encourage the wealthiest individuals and families to donate large sums during their lifetimes (Spero, 2014). As of 2013, forty American billionaires signed on because they believed in the importance of education, assisting future generations, or leaving a legacy (Acs, 2013). More recently, Facebook founder, Mark Zuckerberg, and his wife, Dr. Priscilla Chan, pledged to donate 99 percent of their Facebook shares to the causes related to human advancement. This represents roughly $45 billion at Facebook's current valuation, making it one of the largest pledges in history (Brandom, 2015). Cynical critics question whether these efforts will result in measurable improvement for society,

and they view these campaigns as publicity stunts or even socialist (Acs, 2013). Some perceive that philanthropy undercuts democratic processes, as power is transferred from the state to billionaires (Acs, 2013).

Thorup (2013) described celebrity philanthropy where the wealthy and famous are promoting certain charities or causes. Thorup mentioned Bono, who is the lead singer of the rock band U2, as "the most famous of the celebrity philanthropists." Bono has promoted the initiative Product Red, of which profits support a global fund to combating HIV, AIDS, malaria, and other diseases (Thorup, 2013). Additionally, actor George Clooney pledged his private funds to sponsor a satellite to monitor troop movements in the south of Sudan (see website www.satsentinel.org) (Thorup, 2013). There have also been several celebrity adoptions, such as pop star Madonna, who adopted a Malawi child in 2006 (Thorup, 2013, p. 570), and actors Angelina Jolie and Brad Pitt, whom have adopted three children from Cambodia, Vietnam, and Ethiopia.

Internationally, the philanthropic activities of the "super-rich" are far-reaching. Coutts Million Dollar Donors Report (2014) provided annual data on donations of at least one million dollars by individuals. Higher education was one of the most popular causes, and foundations were typically the recipients of donations (Coutts, 2014). Most million dollar donations are given to domestic organizations, but overseas donations were increasing (Coutts, 2014). Refer to Figure 8.

Table 2: Million Dollar Donations by Individuals

COUNTRY	TOTAL VALUE OF DONATIONS	DONATIONS
UNITED STATES	$16.92 billion	1,173
CHINA	$2.65 billion	208
UNITED KINGDOM	$2.24 billion	292
MIDDLE EAST	$1.843 billion	38
RUSSIA	$1.01 billion	126
HONG KONG	$935 million	120
SINGAPORE	$713 million	38

Source: Coutts Million Dollar Donors Report (2014)

There was no common thread regarding the sources of major donations. In the United Kingdom and Hong Kong, foundations were the biggest source of million dollar donations by value. In Singapore, the Middle East, and China, the largest proportion of funds came from corporate donors. In the United States and Russia, individual donors contributed the largest amount (Coutts, 2014; see Table 2).

The Forbes Insight survey included 414 high net worth individuals from Europe, Asia, the Middle East, and the United States (Forbes Insights, 2014). The participants were selected in equal numbers among the four regions and had at least $5 million in investable assets (Forbes Insights, 2014). This survey created the BNP Paribas Individual Philanthropy Index (maximum = 100) that included the criteria of current giving, projected giving, promotion (of a charity or cause), and innovation (to spend money effectively) (Forbes Insights, 2014, p. 3). The United States had the highest index score of 53.2, followed by Europe (46.3), Asia (42.4), and the Middle East (29.4) (Forbes Insights, 2014).

Among the top causes in the world, respondents from Europe, Asia, and the Middle East cited the environment, whereas health was the predominant cause for the United States. The Middle East and the

United States also stood out by selecting social change as one of the top three issues for philanthropy in the world (Forbes Insights, 2014)

The majority of philanthropists (56 percent) considered the need for philanthropy in the world as extremely urgent (Forbes Insights, 2014, p. 5). However, more respondents from the United States (64 percent) and the Middle East (61 percent) saw the world as in extreme need of philanthropy (Forbes Insights, 2014, p. 5). The causes considered the most urgent in need of philanthropy were equally hunger and the environment in Europe (35 percent each), the environment in Asia (44 percent) and in the Middle East (59 percent), and equally health and hunger in the United States (33 percent each) (Forbes Insights, 2014).

The findings from the BNP Paribas Individual Philanthropy Index confirmed the importance of personal experience as motivation for giving throughout the world. Religious faith and altruistic desire were also common types of motivation across the regions (Forbes Insights, 2014, p. 6).

Table 3: Motivations for Giving

Europe		Asia		United States		Middle East	
Altruistic desire	22%	Desire to give back to society	19%	Personal experience with area of focus	22%	Personal experience with area of focus	29%
Personal experience with area of focus	16%	Altruistic desire	19%	Religious faith	16%	Religious faith	21%
Sense of duty	16%	Sense of duty	16%	Sense of duty	14%	Ethnic or national identity	13%

Source: Forbes Insights, 2014

The survey also showed that the majority of respondents from the Middle East and Asia are feeling more positive about their wealth levels, while respondents from the United States fell in the middle of the spectrum (Forbes Insights, 2014, p. 6; see Table 3). Although philanthropists consider philanthropy their moral obligation, governments favoring giving also affected philanthropy (Forbes Insights, 2014, p. 6). Middle Eastern philanthropists were the most patient, with 55 percent of them willing to wait for results of their charity for more than twenty-five years. Philanthropists from Asia were the least patient, with just 11 percent willing to wait that long (Forbes Insights, 2014, p. 6).

Foundations

The Foundation Center estimated that foundations provided about $49 billion of grants in 2013 (Lilly Family School of Philanthropy, 2014). This included independent and family (76 percent), operating (13 percent), and community foundations (11 percent). Approximately 63 percent are family foundations, which donated about $23 billion in 2013. As of 2008, there were 112,000 U.S. foundations, which held more than $627 billion in assets (Anheier and Hammack, 2010, p. 3). American foundations have grown substantially over the past two decades and have accumulated substantial resources (Anheier and Hammack, 2010). According to Laskowski (2011), the number of U.S. grant-making foundations grew by more than half, total foundation assets increased by a third, and total grant dollars doubled (p. 6). Most U.S. foundations work in the following fields: education (kindergarten through twelfth grade or "K–12"), higher education, health care, social welfare, international aid, arts and culture, religion, and social movements (Anheier and Hammack, 2010, p. 3).

U.S. foundations are more numerous and more influential with a longer, more continuous history than in other countries (Anheier and Hammack, 2010). U.S. foundations have specific structural, financial, and legal obligations, but also have much freedom and flexibility to carry out their programs and activities for charitable purposes (Anheier and Hammack, 2010). The IRS describes charitable purposes as "relief of the poor, the distressed, or the underprivileged; advancement of religion; advancement of education or science; erecting or maintaining public buildings, monuments, or works; lessening the burdens of government; lessening neighborhood tensions; eliminating prejudice and discrimination; defending human and civil rights secured by law; and combating community deterioration and juvenile delinquency" (Anheier and Hammack, 2010, p. 4).

Anheier and Hammack's research (2010) focused on the largest 5 percent of American foundations, which hold the bulk of the philanthropic assets (p. 6). Foundations contribute one-fifth of the income of America's NPOs (or the grants economy) (Anheier and Hammack, 2010, p. 7). Anheier and Hammack noted the earliest recognized American foundations were in 1790s. Religion was a key motivation for some of the first foundations and they would feed the poor (especially widows and orphans) and care for the sick and dying (Veyne, 1990 as cited by Anheier and Hammack, 2010, p. 7).

Philanthropy describes foundation efforts to create something new in one of three ways: (1) innovation—new ways of doing or perceiving things; (2) control—preservation of traditions, cultures, values, and beliefs or redistribution of wealth from the rich to the poor; (3) and asset protection—to distribute funds for use by other charitable institutions or for particular charitable purposes (Anheier and Hammack, 2010, pp. 10–11). Foundations do not only give money away, they also invest as social entrepreneurs, institution builders, risk takers, and value conservers (Anheier and Hammack, 2010). The most effective foundations have longevity, consistency, and good judgment (Anheier and Hammack, 2010), and they act as neutral intermediaries (with no direct market or electoral interests). Disadvantages of foundations are insufficiency (lacking resources), particularism (bias toward a particular group or values), paternalism (elitist control over beneficiaries), and amateurism (cursory understanding of the field or issues) (Anheier and Hammack, 2010).

The focus of foundation giving has shifted over time. In the beginning of the nineteenth century and earlier, foundations helped to create America's Protestant denominations (Anheier and Hammack, 2010). There were foundations for educational purposes, such as Peabody Education Fund and Carnegie libraries (Anheier and Hammack, 2010). In the first half of the twentieth century, most foundations were established by businessmen who prospered from the Industrial Revolution, such as Rockefeller, Rosenwald, Milbank Memorial, Russell Sage, Twentieth Century, Guggenheim, Alfred P. Sloan, W. K. Kellogg, and Mott Foundations (Anheier and Hammack, 2010). These foundations established many museums, operas, gardens, and educational institutions.

Another type of foundation emerged, such as the community foundation or "community chest," the predecessor to United Way movement (locally raised funds are pooled and distributed to participating charitable organizations through an administrative organization) (Anheier and Hammack, 2010, p. 17).

In more recent decades, foundations have grown much more slowly and have, as a result, become less important. Other institutions have increased their income, such as "private colleges, not-for-profit hospitals, state universities, county hospitals, nonprofit job training centers, and similar entities" (Anheier and Hammack, 2010, p. 8). Anheier and Hammack recognized issues of inequality and how "U.S. foundations once helped define limits and indirectly served to maintain social barriers within American society by confining their gifts largely to white men" (Anheier and Hammack, 2010, p. 7). Foundations

"enable ambitious people to exchange economic wealth for social recognition and prestige" (Anheier and Hammack, 2010, p. 7).

Today, foundations are more committed to transparency and meeting measurable goals. The social entrepreneurship trend in philanthropy stems from real and perceived failures of government and offers a "for-profit solution of social problems" (Anheier and Hammack, 2010, p. 24). A 2013 report by the Foundation Center noted how foundations are increasingly working in human rights grant-making (Lilly Family School of Philanthropy, 2014). This includes working in women's reproductive rights, health care access, and the protection of individual or group rights, such as women and girls, Lesbian Gay Bisexual Transgender (LGBT) community, or migrants and refugees (Lilly Family School of Philanthropy, 2014).

Other trends in philanthropic approaches stem from California's Silicon Valley. The rise of the Internet businesses, such as Intel, Microsoft, Hewlett-Packard, eBay, and Google, created extraordinary new wealth that also led to the growth of new foundations and increased support for community foundations where they are (Anheier and Hammack, 2010).

Corporations

U.S. corporations gave an approximate $18.22 billion in 2013 (Lilly Family School of Philanthropy at Indiana University, 2014). This included $5.73 billion of corporate foundation grants. During 2013, corporations donated $81 million in support of disaster relief. Giving by corporations is directly linked with companies' profits and the economic environment (Lilly Family School of Philanthropy at Indiana University, 2014). According to "Giving USA 2015: Highlights," key economic factors associated with charitable giving grew in 2014—such as gross domestic product (rose 3.9 percent) and corporate pretax profits (8.3 percent) (Lilly Family School of Philanthropy, 2015). In 2014, corporate giving as a percentage of pretax profits was at 0.7 percent in 2014. During this year, giving by corporations increased by 13.7 percent to a total of $17.77 billion.

The Committee Encouraging Corporate Philanthropy's (CECP) conducted a survey of 271 multibillion dollar companies with aggregate revenues of US$8.3 trillion (CECP, 2015). Giving rates were largely stabilized from 2012 to 2014, which indicates that companies see "investment as essential to their operations" (CECP, 2015). For these companies, the median amount of donations was US$18.5 million (CECP, 2015). These donations tended to be direct cash from the corporate budget, cash from the foundations, and lastly, noncash (product, service, pro bono, and other contributions). Corporate matches of employee donations were 12 percent of total corporate cash contributions with nine out of ten companies offered an employee matching program. In addition, six out of ten companies offered paid-release time volunteer programs. These companies donated to these top three programs: education (higher and K–12) (29 percent), health and social service (25 percent), and community and economic development (15 percent). Many of these companies, seven out of ten, gave to recipients abroad.

Volunteers

Volunteering is an active investment in the public life of a community that includes direct contact with others and face-to-face integrating of social ties (Jones, 2006, p. 259). The estimated rates of volunteering ranges between 30 to 50 percent, and researchers used various definitions of volunteering. According to the Corporation for National and Community Service (2013), an estimated 64.5 million, or 27 percent, of U.S. adults volunteered in 2012 (as cited by Lilly Family School of Philanthropy at Indiana University, 2014). U.S. residents volunteered at a rate of 32.4 hours per person, which amounts to a total of about 7.9 billion hours for 2012. This is equivalent to $175 billion contributed to charities and communities. U.S. residents living in suburban and rural areas volunteered at a slightly higher rate, 27 percent, compared to

those in urban areas (24 percent). Most U.S. residents volunteer for the following types of organizations: religious (34 percent), education (27 percent), and social service (14 percent). The most common types of volunteering are fundraising (26 percent) and distributing food (24 percent).

The Census Bureau reported that on average, a volunteer gives four hours of work per month (Cnaan et al., 2010, p. 498). Cnaan et al.'s (2010) U.S. study determined that volunteering tended to range between 44 percent and 48 percent from 2006 to 2008 with a higher percentage reported around the January months because many more people volunteer around the holiday season (p. 509). Monthly volunteering ranged from 24 percent to 27 percent (Cnaan et al., 2010, p. 512). The percentage of those who volunteered at least monthly ranged from 60 percent to 63 percent, and the percentage of those who volunteered at least weekly ranged from 28 percent to 44 percent. The rate of daily volunteering was 4 percent to 7 percent. From 44 percent to 51 percent of volunteers donated their time at a church or other religious organization. About a fifth to approximately a third of the volunteers donated their time with organizations that serve youth and children, educational organizations, human service organizations (welfare), and community groups. Five percent to 17 percent of volunteers reported that they donated time for organizations that serve the elderly, protect the environment, help in disaster relief, or help for hospitals (Cnaan et al., 2010, p. 512)

Putnam stated that nearly half of Americans "claim to undertake some sort of volunteer work, including both volunteering in organized settings, like churches and hospitals, and informal helping behavior, like baby-sitting a neighbor's plants" (Putnam, 1995, p. 118). More seniors are volunteering, and Putnam attributed this to the more civic-minded baby boomer generation (Putnam, 1995). The Corporation for National and Community Service (2013) quantified this trend and found that more than 25 percent of persons over age fifty-five volunteered, compared to 16 percent for persons ages thirty-five to forty-four, and 15 percent for persons ages forty-four to fifty-four. Volunteering and giving represent two distinct forms of engagement for civic life (Jones, 2006). Putnam's (2000) and Andreoni et al. (1996) asserted that Americans are substituting volunteer time for money. Jones (2006) claimed, "[I]t is unlikely that giving will replace voluntarism" because "giving and volunteering seem to represent complementary ways to participate in civic life" (p. 262).

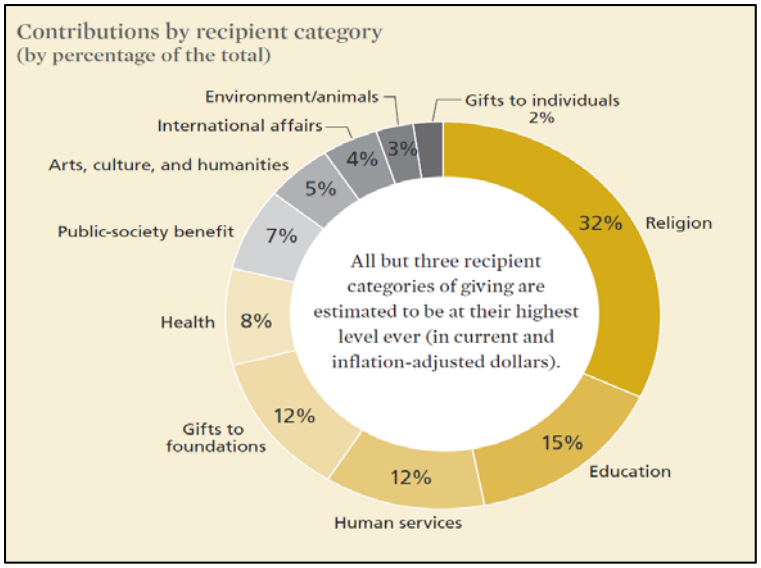
Recipients

The most common recipients of donations were religious charities (32 percent or $114.90 billion), followed by education (15 percent or $54.62 billion), human services (12 percent or $42.10 billion), and gifts to foundations (12 percent or $41.62 billion) (The Giving Institute, 2015). Refer to Figure 8. The remaining 29 percent went to the following types of charities: health (8 percent or $30.37 billion); public-society benefit (7 percent or $26.29 billion); arts, culture, and humanities (5 percent or $17.23 billion); international affairs (4 percent or $15.10 billion); environment and animals (3 percent or $10.50 billion); and gifts to individuals predominately for medical reasons (2 percent or $6.42 billion) (The Giving Institute, 2015).

Cnaan et al. (2010) determined from 2006 to 2008, about half of donating households surveyed contributed "some or all of their donations to churches or religious organizations, followed by human service organizations and community groups, programs, and organizations that serve children and youth, each of which receives support from between 26% and 38% of households" (p. 516). A quarter of the households reported donating to educational organizations and disaster relief (Cnaan et al., 2010, p. 516). Disaster relief post-Katrina (January 2006) was very high (47 percent) and leveled down to about a quarter of the households in subsequent months (Cnaan et al., 2010, p. 516). From 2007 to 2008, post-Iraq

and Afghanistan, troop/soldier-related organizations increased to more than 1 percent in the other category (Cnaan et al., 2010, p. 516).

Figure 8: Recipient Categories, 2014



Source: Lilly Family School of Philanthropy at Indiana University (2015); Giving USA 2015: Highlights

As part of Kapoor and Tewari's research in BRICS diaspora, disaster relief and education are the two most popular causes (Kapoor & Tewari, 2010, p. 6). The interviewees gave "generously to educational institutions in the US but not as much to schools back home" (Kapoor & Tewari, 2010, p. 6). Many contribute to the schools and universities that they attended in the United States (Kapoor & Tewari, 2010, p. 11). The category of human rights was the least popular cause, but anticorruption initiatives were a new area of interest (Kapoor & Tewari, 2010, p. 6).

Why Engage in Philanthropy?

This section discusses why individuals engage in philanthropy, including lower- and middle-class persons and the "super-rich" (e.g., millionaires and billionaires). We do not,specifically, address what motivates institutions, such as corporations and foundations, but some of the reasons are presumably the same. There are both economic incentives and psychological benefits for engaging in philanthropic activities. In addition, there are social benefits, such as social capital. Some people are philanthropic as a form of civic or community engagement. Another reason for philanthropic behavior may be peer or cultural influences from family, friends, neighbors, and the community at large. Some may feel social pressure or social control by family or religion to participate in charitable activities, while others may have the desire to create social change and address income inequality.

Economic Incentives

Apart from cultural values or individual psychological motivations, people may give partially because they see a personal economic benefit in doing so. For Andreoni (2000) discussed the economic models of behavior, which is based on the assumption that individuals have a choice in how they behave. He wrote about how "Economics is founded on the view that people are self-interested" (Andreoni, 2000, p. 11370). When this framework is applied to philanthropic behavior, the question arises: "[W]hy would people who work hard for their money simply turn around and give it away?" (Andreoni, 2000, p. 11370). Andreoni offered several possible explanations, including economic incentives. One explanation is that people want the services provided by charitable organizations, such as National Public Radio. Another explanation is that the individuals are getting something in exchange for their contributions, such as discounts or preferred seating at events, buildings named after them, public recognition or accolades, and so forth. Clotfelter (1997) described this as a utility-maximizing model when the donor accrues tangible benefits or actual material return (p. 8).

There is a cost to engaging in philanthropic activities. Some researchers have analyzed the costs and benefits. For example, Randolph's panel study (1995) indicated that "a policy that would increase the cost of giving by 10 percent would reduce giving by only about 5 percent, whereas if income were to rise by 10 percent, giving would rise by 11 percent" (Andreoni, 2000, p. 11373). Clotfelter (1997) discussed how tax deductions create a net-of-tax price of giving. Bekkers and Wiepking (2010) referenced authors who have analyzed when the costs of a donation decrease, giving increases (Bekkers, 2005; Eckel and Grossman, 2003, 2004; Karlan and List, 2007). Bekkers and Wiepking concluded that this was "not only true for the absolute costs but also for the perception of the costs of a donation" (Bekkers and Wiepking, 2010, p. 932).

Psychological Benefits

Examining institutions, social interactions, and culture offer explanations of why people engage in philanthropy. Since the 1980s, philanthropic studies have emerged as a new, multidisciplinary field in the social sciences (Katz, 1999 as cited by Bekkers and Wiepking, 2010, p. 925). Economists are increasingly trying to incorporate basic insights from sociology and social psychology into their models (Bekkers and Wiepking, 2010, p. 925). As stated in the economic incentives section earlier, economic theories discuss the costs and benefits of donating time or money. However, there are also social and psychological costs and benefits (Dovidio et al., 2006 as cited by Bekkers, 2010, p. 369). These benefits may be called social incentives or rewards (Barclay, 2004; Hoffman et al., 1996; Long, 1976; Satow, 1975 as cited by Bekkers, 2010, p. 370). Van Lange (2000) described social value orientations and how "some persons are motivated primarily by their own outcomes, while others are more concerned for joint outcomes" (as cited

by Bekkers, 2010, p. 371). Acs (2013) reiterated this sentiment: "Self-interest and altruism, though very different motives for human activity, are in fact, fundamental traits of human nature and both are crucial to maintaining the strength and vitality of any society" (p. 6). Andreoni (2000) explained that individuals may engage in philanthropy to feel an "internal satisfaction" or a "warm glow" (p. 11370).

Bekkers and Wiepking (2010) offered perspectives on why people give from both sociology and social psychology. These perspectives include altruism, reputation, psychological benefits, values, and efficacy. Altruism is caring "about the organization's output, or the consequences of donations for beneficiaries" (Andreoni, 2006 as cited in Bekkers and Wiepking, 2010, p. 936). Donors consider the social consequences or their reputation when donating, such as verbal or nonverbal rewards for giving or punishments for not giving (Bekkers and Wiepking, 2010). The psychological benefits of giving "may contribute to one's self-image as an altruistic, empathic, socially responsible, agreeable, or influential person" and may result in an "automatic emotional response, producing a positive mood, alleviating feelings of guilt, reducing aversive arousal, satisfying a desire to show gratitude, or to be a morally just person" (Bekkers and Wiepking, 2010, p. 938).

Efficacy refers to the donors' perception regarding how their contribution makes a difference to the cause they are supporting (Bekkers and Wiepking, 2010, p. 942). Efficacy makes a charitable giving more or less attractive to donors who base many of their decisions pending on their attitudes and values (Bekkers and Wiepking, 2010, p. 941). Multiple motives are likely to operate simultaneously, and a mix of these motives differs over time, place, organizations, and donors (Bekkers and Wiepking, 2010, p. 944).

Herzog and Price (2016) find that "social psychological orientations help to explain variation in American giving" (p. 208). They identified seven major orientations that include a spectrum of values motivating people to give. Those who gave most frequently and regularly identified with all orientations which include values relating to social solidarity, life purpose, collective conscious, social trust, prosperity outlook, acquisition seeking, and social responsibility. They also note that having "a generous self-identity" can also influence generosity outcomes (Herzog and Price, 2016, p. 211).

Social Capital

In addition to individual personal values and beliefs, individual giving behavior can also be influenced by the network in which individuals are embedded. Herzog and Price (2016) find that the internal orientations, mentioned in the preceding text, also work with interpersonal networks to affect giving outcomes. Individuals may find themselves in networks that are "giving-supportive" or not giving-supportive; giving-supportive networks of friends and family can influence and encourage a generous identity (Herzog and Price, 2016, p. 272). Social capital theory is based on the assumption that social networks have value and that social contacts affect the productivity of individuals and groups (Putnam, 1995, p. 19). According to Putnam, social capital can be simultaneously a private and public good (Putnam, 1995, p. 20). The value of social capital manifests in a number of outcomes, both economic and noneconomic (Coleman, 1988, p. S100). Regarding production, there is physical capital (tools, machines, and other equipment) and human capital (skills and capabilities) (Coleman, 1988, p. S100). Social capital is the relations among persons that facilitate action; it is less tangible than physical and human capital because it exists in the relationships (Coleman, 1988, p. S100).

People are socialized and their actions are governed by social norms, rules, and obligations (Coleman, 1988, p. S95). Although the actor may make behavioral decisions or arrive at their goals independently, the actor is also shaped by the environment (Coleman, 1988, pp. S95–S96). According to Coleman

(1988), social structures are the relations between actors and among actors (p. S98), and social organization affects the functioning of economic activity (p. S97).

When examining why people engage in philanthropy, Coleman (1988) explored how social capital motivates individuals. Costa and Kahn (2003) wrote that social capital "refers to aspects of the network structure—such as social norms and sanctions, mutual obligations, trust, and information transmission—that encourage collaboration and coordination between friends and between strangers" (p. 103). Social capital relies on reciprocity expectations and group enforcement of norms (Portes, 2000, p. 47). There may be an obligation that you will be repaid in the future, but the type of and time frame for repayment is unspecified (Portes, 2000, p. 49). Putnam also wrote how "The Golden Rule" (to treat others how you wish to be treated) is one formulation of this generalized reciprocity (Putnam, 1995, p. 20).

Additional perspectives on social capital are offered by French author, Bourdieu (1986), who described social capital as consisting of "social obligations ('connections'), which is convertible, in certain conditions, into economic capital and may be institutionalized in the form of a title or nobility" (p. 82). Social capital is a "network of more or less institutionalized relationships of mutual acquaintance and recognition, or in other words, to membership in a group, which provides each of its members with a backing of the collectively-owned capital" (Bourdieu, 1986, 2011, p. 86). These relationships may exist in the practical state in material and/or in symbolic exchanges, and they are socially instituted through grouping such as a family, a class, or a tribe or of school, a party, and so forth (Bourdieu, 1986, 2011, p. 86). Institution, family group, or kinship relations can produce and reproduce relationships that can secure material or symbolic profits that are usable in the short or long term (Bourdieu, 2011, p. 87).

Social capital is embodied within society and, therefore, it "depends both upon individual socioeconomic and demographic characteristics and upon the characteristics of society" (Costa and Kahn, 2003, p. 103). These authors link social capital to civic engagement:

Social capital has been measured using indicators of group participation (such as volunteer activity, organizational membership and activity, entertaining and visiting friends and relatives, and voting), indicators of the strength of network ties (trust, for example), and indicators of community commitment (such as public expenditures and loan repayment to community members). (Costa and Kahn, 2003, p. 103)

Portes (2000) noted, "Recent writings on social capital have extended the concept from an individual asset to a feature of communities and even nations" (p. 43). According to Portes, there are three functions of social capital: (1) as a source of social control; (2) as a source of family support; and (3) as a source of benefits through extrafamilial networks (p. 51). Portes (2000) and Putnam (1995) recognized a bias in the research literature on social capital, which strongly emphasizes its positive sequences. Putnam clarified how social capital can be unifying (to include others) and/or bonding (to exclude others) (Putnam, 1995, p. 22). At the same time, community networks and group participation may result in social control, create demands for conformity, and restrict personal freedoms (Portes, 2000, p. 57). For example, Portes wrote "mafia families, prostitution, and gambling rings, and youth gangs offer so many examples of how embeddedness in social structures can be turned to less than socially desirable ends" (Portes, 2000, p. 59). Xavier de Souza Briggs (1997) offered additional examples of the Ku Klux Klan, NIMBY (not in my backyard) movements, and power elites that exploit social capital (Putnam, 1995, p. 21).

Peer Influence

A related factor to giving is peer influence. Individuals may engage in philanthropy because of a sense of religious duty, other peer pressure, or social status (Rose-Ackerman, 1996, as cited by Andreoni, 2000, p.

11370). In most cultures, there is a moral obligation or code of conduct to help others. These cultural values may stem from one's family or religion; alternatively, these values could be promoted through government, educational, or other institutions.

Wilson and Musick (1997) found that social interaction is one of the most important predictors of volunteering. This and other studies suggest that a web of primary social ties, with family and friends, encourages volunteerism (Jackson et al., 1995; McPherson, Popielarz, and Drobnic, 1992; Wilson and Musick, 1997). Often, one becomes a volunteer by being asked by a friend (Smith, 1994; Wilson and Musick, 1999) or learning the behavior as a child from a parental role model.

According to Kapoor (2010), family and faith are priorities for most persons from BRICS countries. This also applies to many other countries, particularly with immigrant populations. Kapoor wrote how "philanthropy begins at home" in BRICS countries. Giving money or helping family members and other close relations occurs regularly, particularly when someone is ill or for a wedding or other big life event (Kapoor, 2010, p. 11). In emerging economies, charity "has most often been private, personal, informal, ad hoc, and family based and usually is not formalized, institutionalized, professional, or what Westerners would deem strategic" (Spero, 2014, p. 1).

Religious Motivations

Traditionally, religious motivations for giving focused on charity, alleviating poverty, hunger, disease, illiteracy, and the impact of natural disasters (Spero, 2014). Brooks (2003) wrote about how religious people give because of "social pressure, for personal gain (such as stashing away rewards in Heaven), or to finance the services that they themselves consume, such as sacramental activities" (p. 43). Most BRICS members, with the exception of Russian Americans, give regularly to faith-based groups as "a way of being closer to God [or other deities]" (Kapoor, 2010, p. 10). Most do not consider these gifts as philanthropy, but instead, as "a path to redemption or just a means to bring peace to their own lives" (Kapoor, 2010, p. 10). Many continue to give regardless if these religious institutions are "flush with funds" (Kapoor, 2010, p. 10).

According to Putnam, there is a correlation between religious and civic/community engagement:

Churches provide an important incubator for civic skills, civic norms, community interests, and civic recruitment. Religiously active men and women learn to give speeches, run meetings, manage disagreements, and bear administrative responsibility. They also befriend others who are in turn likely to recruit them into other forms of community activity. (Putnam, 1995, p. 66)

Putnam wrote that religious involvement is a strong predictor of philanthropy and volunteering: (1) 75 to 80 percent of church members give to charity, as compared to 55 to 60 percent of nonmembers, and (2) 50 to 60 percent of church members volunteer, while only 30 to 35 percent of nonmembers do (Putnam, 1995). Putnam (1995) also wrote about the importance of faith-based organizations for social capital and civic engagement in the African American community. He stated that "[t]he church is the oldest and most resilient social institution in black America, not least because it was traditionally the only black-controlled institution of a historically oppressed people" (Putnam, 1995, p. 68). Both during and after the civil rights struggle, the black religious tradition distinctively encouraged the mixing of religion and community affairs to invigorate civic activism (Putnam, 1995).

According to Brooks's analysis of the Social Capital Community Benchmark Survey (2003), "[A]mong those who attend worship services regularly, 92 percent of Protestants give charitably, compared with 91 percent of Catholics, 91 percent of Jews and 89 percent from other religions" (p. 41). According to

Putnam, "Protestant and Jewish congregations have lost market share in terms of membership, while Catholics and other religions have gained" (1995, p. 75). The growth of Catholicism and other religions may be influenced by immigration from Latin America and Asia (Putnam, 1995, p. 76). Putnam critiqued that these more popular denominations' community building efforts have been directed inward to help their congregation rather than outward to help the community at large (Putnam, 1995, p. 79).

Civic Engagement

Alexis de Tocqueville, the French aristocrat who toured the fledgling United States in the 1830s, observed that "Americans of all ages, all stations in life, and all types of dispositions are forever forming associations, Tocqueville (Skocpol, 1997, p. 457). The early American Republic, prior to the Civil War had a remarkable number of local, regional, state-level, and national voluntary associations that had already emerged by the 1820s (Skocpol, 1997, p. 459).

Volunteering helps to create ties to an organization, which encourages donating funds. Volunteers are often a substitute for paid staff and, thus, have economic value. Americans, historically and currently, have created associations and volunteered at organizations as a form of civic engagement. Civic or community engagement are methods of collective involvement and are important to the democratic process (Jones, 2006, p. 252). Community members interact and integrate because of common interests, concerns, and causes. According to Jones (2006), community integration "is facilitated by multiple community ties, including spending time with others, weekly participation in civic associations, years lived in the community, membership in civic associations, and frequency of church attendance" (p. 255). Volunteering and giving have been linked to increased political involvement (Verba et al., 1995; Wilson, 2000 as cited in Jones, 2006). Volunteering "can be linked to a community-based form of civic engagement, facilitated by face-to-face interaction in physical contexts" (Jones, 2006, p. 251).

Skocpol (1997) identified key time periods for voluntary associations as (1) prenational, 1700s; (2) early national, early 1800s; (3) Civil War–World War I, late 1800s to 1930s; (4) New Deal–World War II, 1930s to 1950s; and (5) contemporary era, 1950s to present. She explained that these "junctures are, above all, moments of intense electoral participation and competition—particularly during the nineteenth century, when the mobilization of eligible (white male) voters was at an all-time high" (Skocpol, 1997, p. 467).

During the prenational time period and early national period, the types of associations were Ancient and Accepted Free Masons, American Anti-Slavery Society, Improved Order of Redmen, Young Men's Christian Association, Junior Order of United American Mechanics, and National Teachers' Association (Skocpol, 1997, p. 464). Examples of associations from the Civil War–World War I time period included veterans and labor organizations, such as Veterans of Foreign Wars of the United States, International Brotherhood of Teamsters, Farmers Alliance, and Colored Farmers' Alliance (Skocpol, 1997, p. 464). There were also women's organizations, such as National American Woman Suffrage Association and National Congress of Mothers (Parents Teachers Association from 1924) (Skocpol, 1997, p. 464). In addition, there were associations based on interests or social connections, for example, Boy Scouts of America, American Bowling Congress, Benevolent and Protective Order of Elks, the National Rifle Association, and Ku Klux Klan (Skocpol, 1997, p. 464).

Since the 1920s, Putnam (1995) noticed a decline in civic engagement. He attributed this decline to (1) 10 percent because of the pressures of time and money with two-career families; (2) 10 percent because of suburbanization, commuting, and sprawl also played a supporting role; (3) 25 percent because of electronic entertainment, predominately television, privatizing our leisure time; and (4) about 50 percent

because of generational change or "the slow, steady, and ineluctable replacement of the long civic generation by their less involved children and grandchildren" (Putnam, 1995, p. 283). Putnam stated that "the erosion of social capital has affected all races" and "African Americans have been dropping out of religious and civic organizations and other forms of social connectedness at least as rapidly as white Americans" (Putnam, 1995, p. 280). Then, there was a "civic drought" induced by the Great Depression.

From the New Deal to World War II, many organizations focused on the labor movement. These organizations included the Old Age Revolving Pensions, United Automobile Workers, and Steel Workers (Skocpol, 1997, p. 465). Skocpol coined this period in U.S. history as "the golden era" of American democracy in the 1930s and 1940s and the peak of the labor union movement (Skocpol, 1997, p. 456). Some large voluntary associations' membership did shrink during the 1930s, when many people could not afford to pay dues. However, some recovered by the 1950s (Skocpol, 1997, p. 467). Putnam (1995) described the civic-minded World War II generation (p. 16).

Many Americans participated in community groups in the 1950s and 1960s (Putnam, 1993, p. 16). Baby boomers (the generation born after World War II) approached college and America's population was unusually young (Putnam, 1995, p. 17). Although civic involvement generally increases when a person is middle aged, dozens of studies confirmed that education was the best predictor of engagement in civic life (Putnam, 1995, p. 18).

Associations that were founded during this contemporary era (from the 1950s to present) included the American Association of Retired Persons, National Right to Life Committee, Mothers against Drunk Driving, and Christian Coalition (Skocpol, 1997, p. 465). In the 1960s and 1970s, U.S. voluntary associations, grassroots groups, and national advocacy organizations achieved membership peaks, in tandem with the growth of state and national governmental functions and decision-making (Skocpol, 1997, pp. 468, 473). Clemens (1997) described how "associations became good at simultaneously influencing and reflecting popular opinion in localities and at lobbying legislators and government administrators at local, state, and national levels" (Skocpol, 1997, p. 468).

Philanthropy and Social Change

Both philanthropy and social change can alter society and institutions. The mission of many philanthropic institutions is to promote equality, justice, and civil rights. Their goals are to improve the educational and economic opportunities for disadvantaged, underserved, or vulnerable populations. Some of these populations include children, youth, elderly, persons with disabilities, women, LGBTQ, immigrants, and racial or religious minorities. To achieve these goals, many philanthropic organizations are engaged in advocacy, education, job training/creation, community economic development, health care access, and environmental causes.

Social and political movements influence philanthropy. In addition, natural disasters and monumental events trigger philanthropic activities (Yamauchi et al., 2010). Yamauchi, Zui, Huang, and Lee (2010) conducted comparative research on philanthropy in East Asia, but some of their findings apply to the United States and other countries. For example, as part of the Asian culture, "many give congratulatory (e.g. for weddings and other special occasions) and sympathetic (when someone is ill or has passed away) contributions, in addition to religious donations" (Yamauchi et al., 2010, p. 9).

Social and political movements, such as changes in political regimes and the Occupy protests (to address political and economic inequality), also affect civil society. The Occupy Wall Street movement—which began around 2011 in the United States and spread internationally—protested the growing share of national income and wealth to those at the top 1 percent (Laskowski, 2011, p. 6). National and global economic shocks influence philanthropic activities both positively and negatively (Yamauchi et al., 2010). National disasters, such as earthquakes, and hosting high-profile events, such as conferences or the Olympics, may accelerate awareness and participation in philanthropic activities (Yamauchi et al., 2010).

Philanthropy has a redistributive aspect to it (Rogers, 2013) to address the social and economic inequalities within society. Acs (2013) optimistically perceived philanthropy as having "the potential to mitigate inequality as it softens the hard edges of the free market" (p. 11). He wrote, "Recycling wealth reduces income inequality and contributes to a more just society" (Acs, 2013, p. 11). Andrew Carnegie saw inequality as an unavoidable consequence of industrial development. Carnegie wrote an essay in 1889 urging "his fellow millionaires to use the … genius for affairs [which they used to create their fortunes]" to distribute those fortunes toward greater social progress (Herzog and Price, 2016, p. 46). In the Gospel of Wealth, Carnegie (1889) writes warns that "large inherited fortunes would 'sap the root of enterprise,' curtailing opportunities for the talented and industrious on whom dynamic capitalism depended" (as cited by Herzog and Price, 2016). There is an assumption that philanthropy is good and reduces inequality (Rogers, 2013), but there has been little empirical evidence that has proven this. In fact, philanthropy could increase inequality if a few wealthy elites are making economic and policy decisions (Rogers, 2013).

Inequality

Global wealth has been increasing and the gap between the rich and the poor has widened. The Boston Consulting Group (2011) surveyed 120 wealth managers around the world (p. 5). Global wealth climbed by 8 percent in 2010 to US$121.8 trillion, an increase of about US$20 trillion during the depths of the financial crisis (Boston Consulting Group, 2011, p. 5). In the time period before the crisis, from 2002 through 2007, wealth grew at a compound annual rate of nearly 11 percent (Boston Consulting Group, 2011, p. 5). Global wealth is expected to increase at an annual rate of nearly 6 percent over the next several years, with exceptional growth in emerging markets (Boston Consulting Group, 2011, p. 5).

In 2010, global wealth grew by 8 percent; in the time period before the global financial crisis (2002–2007), wealth at been growing at a compound annual rate of nearly 11 percent (Boston Consulting Group, 2011, p. 5). Growth is expected to continue, with the greatest growth occurring in the emerging markets of Asia-Pacific, the Middle East, and Africa. The Asia-Pacific region leads all others in the growth in the proportion of wealth owned by millionaire households (Boston Consulting Group, 2011). The region also shows exceptional growth in private wealth (growing at a rate double the global average in 2010) and in assets under management (29.0 percent in China and 21.6 percent growth in India since 2010) (Boston Consulting Group, 2011, pp. 9–10). In the Middle East and Africa, growth was above the global average but was limited by the volatility in the price of oil and the real estate crisis in Dubai (Boston Consulting Group, 2011, p. 5).

Income inequality refers to the extent to which income is distributed in an uneven manner among a population (Sutter, 2013). The Central Intelligence Agency (CIA) World Factbook's (2015) Gini Index measures the degree of inequality in the distribution of family income in a country. Perfect equality registers a Gini Index of zero, with 100 representing perfect inequality (CIA World Factbook, 2015). Currently, Sweden is the most-equal nation (Gini Index of 23); Lesotho is the least-equal (63.2) (CIA World Factbook, 2015). The United States has a Gini rating of 45, putting it below Iran, Uganda, Nigeria, Russia, Senegal, Nicaragua, Mali, Mauritania, Vietnam, Yemen, and Mongolia (CIA World Factbook, 2015; Sutter, 2013).

Since the late 1970s, the income gap between the richest and poorest in America has been growing. The very richest people are taking home a larger share of income than at any time since the late 1920s (Sutter, 2013). Laskowski (2011) wrote that "[b]y 2007, the richest 10 percent of Americans controlled two-thirds of Americans' net worth. In 2008, the wealthiest 10 percent earned almost the same amount of income as the rest of the country combined" (p. 6). Experts claimed that the income gap may be due to tax breaks for the very richest Americans, the growth of the finance industry, and the increase of technology and machines replacing jobs for middle-class workers (Sutter, 2013).

A recent study by Côté, House, and Willer (2015) determined that in states with higher economic inequality, higher-income respondents were less likely to give generously than lower-income persons. In states with the least inequality, the wealthy were more generous that the poor. Previous research in the United States has shown that the rich are not as generous as the poor, which may be because the wealthy are more selfish or entitled (Côté et al., 2015). This research indicates that resource distribution may undermine collective welfare (Côté et al., 2015).

Similarly, Herzog and Price (2016) find that, although people in poverty make up a greater proportion of Americans who do not donate, and that they are less likely to donate than those who are not poor, poor Americans are relatively more generous in terms of proportion of income donated.

Acs quoted one of the wealthiest men in America, Warren Buffet, who stated that America cannot be a plutocracy "a state in which the wealth class rules … We have to get serious about the shared sacrifice" (Acs, 2013, p. 15).

Philanthropy is a creature and extension of the market (Laskowski, 2011, p. 7). "Philanthropy is, in part if not wholly, a product of the recent rise in inequality and the financialization that powered it" (Laskowski, 2011, p. 7). Financialization is the term given to the decline of manufacturing and the rise of banking and investments on the national and international level in recent years (Laskowski, 2011, p. 7). In civil society, there is also an increased emphasis on financial intermediaries, and NPOs often serve as these intermediaries (Laskowski, 2011, p. 7). Laskowski (2011) wrote, "For nearly five decades, charitable giving as a share of [US] GDP has remained around 2 percent. In 1978, foundations received 4 percent of

charitable dollars; by 2010, foundations were receiving 11 percent of charitable dollars" (p. 7). From his perspective, "Foundations, charitable trusts, donor-advised funds and supporting organizations are all financial instruments marketed to the affluent as tax-advantageous vehicles for surplus wealth" (Laskowski, 2011, p. 9).

Laskowski (2011) stated that "we should expect inequality to decrease somewhat as philanthropy increases" (p. 7), but his research proved that it has not. He declared, "On the contrary, it seems that philanthropy serves to reinforce inequality as much as—if not more than—it serves to disrupt it" (Laskowski, 2011, p. 9). According to Thorup,

Philanthropy has always been dependent upon inequality and hierarchy. Inequality is the reason why philanthropy is needed and the riches of the more fortunate are what provide the material for the philanthropy. So inequality provides both the reason and the resources of philanthropy. (Thorup, 2013, p. 558)

This author claimed that "charity may be generous and selfless but it is dependent upon and is reproducing hierarchy" (Thorup, 2013, p. 559). Philanthropy can increase social capital and ease class tensions, but it has had a difficult time combating inequality (Laskowski, 2011, p. 7). This is partly because a significant and growing part of the sector is more responsive to financial performance rather than community benefits (Laskowski, 2011, p. 9).

Dasgupta and Kanbur's (2011) research findings indicated that philanthropy does not enhance equality. Philanthropy may actually exacerbate inequality, instead of reduce it (Dasgupta and Kanbur, 2011). Dasgupta and Kanbur viewed philanthropy and direct redistribution "as complements, rather than substitutes" (2011, p. 3). These authors stated that "philanthropy magnifies the welfare consequences of income inequality among the non-rich" and the "poor do benefit from such provision, but the rich benefit more" (Dasgupta and Kanbur, 2011, pp. 3–4). Furthermore, they questioned the "the case for exempting donations to churches, temples, museums, art galleries, opera houses, sports clubs, community centers, public parks, universities, elite private schools, private hospitals etc., from taxation" (Dasgupta and Kanbur, 2011, p. 19).

Trends in Philanthropy

New Philanthropy or Philanthrocapitalism

Acs (2013) described philanthropy as a "disruptive force" or social intervention (as cited in Rogers, 2013). In the United States and other advanced economies countries, a new trend in philanthropy focuses on the outcomes or impacts of this intervention. This trend is coined "new philanthropy" or "philanthrocapitalism" or "mega-philanthropy" (Rogers, 2013). According to Rogers (2013), under the new philanthropy model, donors leverage public money to create a for-profit affiliated business or hybrid profit-nonprofit organization. The focus is to leverage funds in different sectors to maximize economic outcomes. These new trends stem from social entrepreneurship to create businesses (or social enterprises) to improve human and environmental well-being.

Another philanthropy trend for U.S. family foundations is investing through venture capital and "impact investing":

The Monitor Institute draws an important distinction between the term "impact investing" and the commonly confused term "socially responsible investing" (SRI), noting that the former is an active attempt on the part of an investor to create a deliberate and focused social or environmental impact through their investments, while the latter is a more general strategy to be "responsible" and at least do no harm through investing. (Hagerman and Geballe, 2013, p. 2)

One form of new philanthropy is giving circles, which are highly participatory forms of collective philanthropy (Rutnik and Bearman, 2005). Giving circles attract individuals of all wealth levels to focus on the power of giving together (Andris, 2011 and Baker-Hallett, 2005 as cited by Ray, 2013, p. 1). Instead of the passive "checkbook" philanthropy (of solely donating money with little involvement), giving circles are hands-on, with participants generally seeking to be involved (Byrne, 2002; Eikenberry, 2005 as cited by Ray, 2013, p. 1). Giving circles are similar to social investment clubs (Taylor and Shaw-Hardy, 2006) that emphasize accountability and entrepreneurship (Ray, 2013). According to Ray (2013), they "generally have five major dimensions: (1) individual members pool and give away resources, (2) members are educated about philanthropy and issues in the community, (3) they include a social dimension, (4) they engage members, and (5) they maintain their independence from nonprofit organizations" (p. 3).

Philanthrocapitalism promotes the idea that capitalism is or can be charitable in and of itself, and "capitalism is not the cause but the solution to all the major problems in the world" (Thorup, 2013, p. 556). There is "no opposition between the market and the common good" (Thorup, 2013, p. 556). Thorup categorized four expressions of philanthropy or philanthrocapitalism:

1. consumer philanthropy, in which we are asked to consume with good conscience;
2. corporate philanthropy, in which businesses engage in social work and philanthropic associations reengineer themselves to mimic corporations;
3. billionaire philanthropy, in which conspicuous consumption is now being supplemented with conspicuous philanthropy; and
4. celebrity philanthropy, in which one of the hallmarks of being a celebrity today consists in the commitment to turn that fame towards a good purpose. (Thorup, 2013. p. 555)

Thorup also theorized that philanthrocapitalism is based on the concept that "there is no conflict between the rich and the poor but rather that the rich are the poor's best and possibly only friend" (2013, p. 556). Thorup stated, "Philanthrocapitalism is the claim that what is good for the rich is good for the poor (but presumably not vice versa)" (2013, p. 558).

Thorup clarified that this "is not the humanization of the corporation but rather a marketization of philanthropy" (Foster, 2007 as cited by Thorup, 2013, p. 564; Weisberg, 2006). The phenomenon includes several different and related strains of corporate philanthropy, for example, corporate social responsibility, philanthro-business, venture philanthropists, upstart-charity, social investment, strategic philanthropy, social entrepreneurs, or plutocharity (Deutsch, 2006 as cited by Thorup, 2013, pp. 564, 566; The Economist, 2006). Civil society is functionalized and is about efficient problem solving, and philanthropy is depoliticized and is, instead, part of the free market (Thorup, 2013, pp. 571–572).

The United States outperformed most developed countries in terms of engaging in philanthropy and entrepreneurship (Acs, 2013, p. xii). The United States had a higher degree of entrepreneurial activity and innovation (when looking at the number of big companies founded) compared to Europe (Acs, 2013, p. 8). Acs credited the United States' entrepreneurial success largely to the opportunities it has afforded to talented and hardworking immigrants. However, American-style capitalism also perpetuates a "cycle of creative destruction," which is a "double-edged sword" (Acs, 2013, p. 9). It promotes entrepreneurship but also enables superior innovations to displace old companies and products, which leads to economic suffering for some workers, companies, towns, and regions (Acs, 2013, p. 9). Philanthropists act entrepreneurial and are "innovators of opportunity" that determine where society is most in need (Acs, 2013, p. 12). But Acs also does not discount the role of government, which uses taxes for "reinvesting wealth in opportunity-creating ventures in areas such as medicine, scientific research, and education" (Acs, 2013, p. 12). Acs described the dynamic of American-style capitalism as "a self-sustaining circle of opportunity, innovation, wealth creation, and philanthropy—[that] has endured over the centuries" (p. 14).

Thorup argued that "social or humanitarian practice is an integrated part of present day 'entrepreneurial' or 'creative' capitalism" (Thorup, 2013, p. 555). Philanthropy has become embedded in everyday consumption; for example, there are more ecological or fair trade products (Thorup, 2013, p. 560). Throup noted how this "'new spirit of capitalism' promises to produce, namely an emotional and moral dimension to purely economic activity" (Thorup, 2013, p. 560). Thorup claimed that contemporary philanthropy has emotionalized the experience (Thorup, 2013, p. 559). Donation campaigns are emotional and persuasive, and if one does not donate they should have a bad consciousness or feel guilty (Thorup, 2013, pp. 561–562). Philanthropy has shifted from compassion, involvement, participation, and common action to individual choices of consumption (buying things) or donating (Thorup, 2013, pp. 561–562). This is "indicative of a shift in capitalism, moving from the society of scarcity's promise of welfare through the state, to the post-scarcity society's promise of liberation and morality in and through capitalism itself" (Thorup, 2013, p. 560).

Some prominent billionaire philanthropists had revealed in interviews that they were skeptical of the government's ability to resolve societal issues. For example, Bill Gates of Microsoft stated in an interview that governments and nonprofit groups take a long time to resolve problems that stem from poverty. Mainly corporations have the skills to make technological innovations work for the poor (Thorup, 2013, p. 564). The founder of Oracle, Larry Ellison said, "The profit motive may be the best tool for solving the world's problems, more effective than any government or private philanthropy" (quoted in Edwards, 2008, p. 12 as cited by Thorup, 2013, p. 563). By turning to the business sector to provide social services, recipients are viewed as customers:

Only businesses are able to respond quickly, efficiently and responsively to philanthropic needs because that is what they do to all their customers. Here it is not only the profit and business model being universalized, but also the customer as the general human being. People in need are just like customers: Identify the need and satisfy it. (Thorup, 2013, p. 564)

Wealthy business people have the financial and human resources. Thorup quoted Bishop and Green (2010): "The rich have 'a responsibility to the rest of society' which goes beyond paying taxes, namely to 'give back with their money and their skills'" (Thorup, 2013, p. 571). As previously mentioned in the "Super-rich" section, many celebrities are spokespersons for different charities, using their fame as actors or musicians to promote these causes through funding, marketing, and media.

"Giving While Living" is a growing trend in philanthropy. This term refers to people donating their money to make a significant impact while they are alive, rather than when they are aged or have passed away (Kredell, 2015). Chuck Feeney, who made his fortune as a founder of the Duty Free Shoppers Group, founded Atlantic Philanthropies in 1982 and in 1984 transferred more than $7 billion to the foundation (Kredell, 2015). In seven countries, Atlantic Philanthropies has funded programs on a variety of issues, including disadvantaged children, aging, human rights, and population health (Kredell, 2015). Three American billionaires, Bill Gates, Warren Buffett, and George Sorros, have donated more than 30 percent of their net worth (Loudenback and Martin, 2015). Microsoft cofounder Bill Gates and his wife Melinda have given an estimated $27 billion already (Loudenback and Martin, 2015). Warren Buffett, CEO of Berkshire Hathaway, a multinational conglomerate company, has donated more than $21.5 billion. George Soros, retired founder of Soros Fund Management, has donated $8 billion. As previously mentioned, Zuckerberg of Facebook, has donated $1.6 billion (4 percent of net worth), and has pledged to donate up to $45 billion throughout his lifetime. In addition, this trend applies to "regular" people, and not just the super-rich, as some parents or grandparents are gifting money or assets to family members before they die (Fetterman, 2007).

In Salamon's (2014) book on "New Frontiers of Philanthropy," he described new models for financing and promoting social and environmental objectives (p. 4). Salamon explains that philanthropy investing has become more diverse, entrepreneurial, global, and collaborative (2015, p. 5). In this new paradigm, CSOs are using more diverse financial instruments and are seeking investment capital through various ventures. Examples of new financing tools include securitization, equity investment, social impact bonds, social investing and purchasing, and crowdsourcing (Salamon, 2015, p. 19).

Donor-advised funds have been increasing as a philanthropic vehicle to establish at a public charity. Donors are allowed to make a charitable contribution, can receive an immediate tax benefit, and can recommend grants to fund. The National Philanthropic Trust (2015) stated that a donor-advised fund is like a charitable checking account: donors contribute to the fund as frequently as they like for grants to their favorite charity. In 2014, U.S. donor-advised funds received more than $19 billion, representing a 14 percent increase over the previous year (Schaefer, 2015). Crowdsourcing and the effects of the Internet on philanthropy are discussed in the next section.

Internet and Social Media

The Internet connects people and provides opportunities to share information. According to Mano (2014), "Social media and social networking greatly affect interaction and connection between people with similar interests" (p. 287). The "vast extent of information accessible via social media affects an individual's likelihood to be exposed to and influenced by beliefs" (Mano, 2014, p. 292). Online

communities have become a satisfying way to engage with others (Hsu et al., 2011), and the Internet provides important communication media affecting civic engagement (Mano, 2014, p. 292).

Social media helps "to create, transfer, retrieve and apply knowledge and provide an effective means for increasing awareness of social causes and encouraging online money donations" (Mano, 2014, p. 287). Social media and networking increases both online and offline voluntary engagement and money contributions; these results suggest that online behavior complements, and in some cases, reinforces offline behavior (Mano, 2014, p. 287). Mano concluded that greater Internet use increases the level of online donations (2014, p. 292). Yet, even with the prevalence of the digital age and social media, some philanthropists frequently prefer to stay under the radar (Forbes Insights, 2014, p. 5).

An emerging trend is crowdfunding, when an "entrepreneur raises external financing from a large audience (the 'crowd'), in which each individual provides a very small amount, instead of soliciting a small group of sophisticated investors" (Belleflamme, Lambert, and Schwienbacher, 2014, p. 585). Crowdfunding has become a valuable alternative method of seeking external financing (Belleflamme et al., 2014, p. 585). Mollick (2013) stated, "Crowdfunding allows for founders of for-profit, artistic, and cultural ventures to fund their efforts by drawing on a relatively large number of individuals using the internet, without standard financial intermediaries" (p. 1). Crowdfunding is similar to microfinance and crowdsourcing, but represents its own unique category of fundraising (Mollick, 2014 p. 2). Crowdfunding is "an open call, essentially through the Internet, for the provision of financial resources either in form of donation or in exchange for some form of reward and/or voting rights in order to support initiatives for specific purposes" (Schwienbacher and Larralde, 2010, as cited by Mollick 2013, p. 2). Mollick argued that even this expansive definition does not include "internet-based peer-to-peer lending and fundraising drives initiated by fans of a music group, among many other cases" (2013, p. 2). Agrawal, Catalini, and Goldfarb (2011) pointed out that "crowdfunding is the geographic dispersion of investors" that can start with family and friends as a source of capital and move beyond (pp. 1–2). Some of the largest crowdfunding websites are GoFundMe, Kickstarter, and Indiegogo. There are also sites specifically for philanthropic and charitable organizations, such as Razoo, Cause, StartSomeGood, and Crowdrise (Briggman, 2013). Online fundraising and outreach campaigns are achieving varying levels of success. The online marketing of social causes has not been effective, in part because some nonprofit sites are poorly managed (Blery et al., 2010; Mano, 2009; Sargeant and Woodliffe, 2007 as cited by Mano, 2014, p. 289).

There are concerns about access and inequality regarding the Internet. The digital divide refers to variations in Internet access resulting from socioeconomic status differences (Lemire et al., 2008). The Internet may exclude some subpopulations, such as those who are low income, the elderly, and persons with low literacy or educational attainment. To access the Internet, some equipment is necessary, which may not be affordable for low-income persons. For example, elderly people are less likely to use the internet (Bundorf, Wagner, Singer, and Baker, 2006). Education is a factor because it increases the skills necessary for using the Internet (Mano, 2014, p. 289).

Another concern regarding the Internet is that social activism, which traditionally included protests, petitions, and demonstrations, would be replaced by virtual/remote participation (Mano, 2014, p. 288). Activists fear that physical attendance at these events may decrease. By contrast, people interested in participating may be able to find out more information about these events and see real-time updates about what is happening.

Conclusion

In this literature review, we examined philanthropy in the United States and its relationship to charity, social change, and religion. We explored philanthropy's role in civil society, which includes the interactions among individuals, families, groups, and institutions. Although the focus of this research is the United States, we draw some comparisons to other developed and emerging countries.

However, our research is limited in scope. We only briefly discuss religious institutions, foundations, and corporate philanthropic activities. Instead, we focus on the economic, psychological, and social incentives of why individuals engage in philanthropy. Additional research is needed to compare the United States' philanthropic landscape to other countries or regions. This may aid in defining a more global definition or determine the geographical, cultural, and contextual differences that are manifested in civil society. Additionally, much of the data regarding donations and volunteering is from formal institutions and does not capture informal and grassroots organizing. We tended to aggregate data and did not differentiate by type of philanthropic activity, which may reveal other trends. Further research would be necessary to understand philanthropy in regard to education, human services, health, arts/culture, international affairs, and the environment. Given our limited resources and scope, we did not fully assess the socioeconomic differences of donors, volunteers, and recipients in civil society. To address the larger goals of the Global Chinese Philanthropy Initiative, it will be useful to review the literature on Asian American and Chinese American philanthropy in the United States and globally.

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