

Annotated Bibliography – Charitable Donor Motivations

*Legend: 1 – very helpful; 2 – substantially helpful; 3 – moderately helpful;
4 – slightly helpful; 5 – minimally helpful*

Berger, Ida (2006). *The influence of religion on philanthropy in Canada.* *Voluntas*, 17, 115-132.

[3] Author examines voluntary and philanthropic behaviors of Canadians across religious groups, specifically looking at motivations and perceived impediments as influenced by religious practice in Canada. This paper may provide value to our study in demonstrating religious influence in a similar culture.

Bremner, Robert (1996). *Giving: charity and philanthropy in history.* New Brunswick, NJ: Transaction Publishers.

[2] Detailed historical look at history of philanthropy, social giving, and begging, dating back to ancient times through middle ages, nineteenth century, and modern days. Includes chapter on religious texts (Jewish, Christian, Islamic) regarding social giving. This information will help us determine historical background of modern giving motivations.

Brooks, Arthur C. (2006). *Who really cares: the surprising truth about compassionate conservatism.* New York: Basic Books.

[1] Recent book describes several studies regarding givers' motivations and benefits of social giving to both individuals and society as a whole. Appendix includes data on charity and givers. This book could be very helpful in shaping our study instruments to best get at our question.

Brown, Melissa S. (n.d.). *Giving following a crisis: an historical analysis.* Indianapolis, IN: Center on Philanthropy at Indiana University. Retrieved 28 November 2007 at <http://www.philanthropy.iupui.edu/Research/Giving/Crisis%20Giving%20paper%203-24-031.doc>

[3] Author takes historical look at statistics regarding charitable donations in relation to years of crisis (wars, natural disasters, terrorist events, etc.). Multivariate analysis shows that economic factors influence giving patterns, where crises do not. This article will provide an interesting example of data analysis in regard to our study topic.

Brown, Melissa S. (2004). *Reconciling estimates of religious giving.* Indianapolis, IN: Center on Philanthropy at Indiana University. Retrieved 28 November 2007 at http://www.philanthropy.iupui.edu/Research/WorkingPapers/reconciling_religious_giving_estimates.pdf

[4] Authors seek to validate survey methodology used for *Giving USA* annual publication by repeating the analysis with two alternate approaches, using different methodologies and different data from different sources. Authors found that for the survey year (2002), all three methodologies produced results within a five percent variance. This article could help us develop our data analysis methodology.

Davis, Evelyn L. (2006). *Interfaith philanthropy: giving across faith in Christianity, Islam, and Judaism* (Masters thesis). Brattleboro, VT: School for International Training.

[3] Author uses interviews of faith leaders and surveys of individuals in faith organizations who have given charitably to causes of another faith to get at the question of what motivates individuals to give money to those of another faith. This is a very specific sub-question to our larger topic, but may provide some insight into motivations of religious givers.

Egger, Robert (2002). *Begging for change: the dollars and sense of making non profits responsive, efficient, and rewarding for all.* New York: HarperBusiness.

[4] Author is nonprofit director in D.C. who advocates for performance measurement and modernization of nonprofit industry. Book includes chapter briefly outlining history of charitable handouts and appendix with statistics and resources regarding giving and volunteering.

Everatt, David et al (2005). *Patterns of giving in South Africa.* *Voluntas*, 16(3), 275-291.

[4] Authors analyze results of quantitative survey of South Africans regarding philanthropic actions. This article may help us compare local survey results with those in another cultural context.

Fowler, Floyd J. (1995). *Improving Survey Questions: Design and Evaluation.* London: Sage Publications.

[2] Floyd J. Fowler, Jr. has authored a guide meant for aspiring researchers that is intended to aid in the construction, presentation, and evaluation of survey questions. His book shows how to word and format a question, write questions that will produce answers for which the questions were designed, and critically evaluate the survey questions. It is meant to enable researchers to write better survey questions and helps users of survey data to evaluate their findings critically. This source is relevant to our topic because we will be designing and evaluating the efficacy of at least one survey. This source will act as a guide in aiding us in designing effective and relevant questions; as well as interpreting whether our findings are empirically sound and useful to our study.

Gaudini, Claire (2003). *The greater good: how philanthropy drives the American economy and can save capitalism.* New York: Times Books.

[3] Author argues that philanthropy is a driving force behind success of American capitalism, in that philanthropists invest in ideas, products and people at earlier stages, allowing them to demonstrate their worth and thus draw government investment. Book includes several anecdotes regarding early discussions that led to creation of certain non-profits, such as Mothers Against Drunk Driving. These anecdotes may give some soft data for our study.

Giving USA Foundation (2006). *Giving USA 2006: The annual report on philanthropy for the year 2005.* Indianapolis, IN: Author.

[1] This annual survey dates back to 1954 and consists of a survey of individuals who have contributed to non-profit organizations, as well as a survey of several non-profits, in an effort to estimate the amount of support given to the non-profit sector overall. The publication includes a great deal of data from the most recent survey, as well as in-depth

findings regarding change over time, outlying factors that influence total giving in a certain year, and other information. This series could well be an excellent source of information to (a) mine as we cogitate on our hypotheses and (b) use to validate our local findings.

Ho, Andrew Ting-Yuan (2006). *Charitable giving: what makes a person generous?* (masters thesis). Washington, DC: Georgetown University.

[2] Andrew Ting-Yuan Ho designed a master's thesis that aimed to examine the behaviors and attributes of charitable givers. He set out to answer the question—what motivates generous people? The master's candidate looks at such variables as marital status, home ownership, religious affiliation, median household income and education in his study of charitable giving patterns. Throughout his research, Ho found that higher income people gave higher amounts to charity, people belonging to religious congregations gave on a consistent basis, and people who had volunteered at least once in the last year were very likely to give a monetary gift. This paper is relevant to our topic because he has conducted a study similar to the one that we intend to conduct. He has collected and analyzed data that will aid in designing our research questions and critically evaluating our results. Through studying his methodology, hypothesis, and statistics we will be able to more effectively design and evaluate our own research.

Joint Center for Poverty Research at Northwestern University. <http://www.jcpr.org>

[1] The researchers and scholars at the Joint Center for Poverty Research at Northwestern University have conducted a number of studies and authored papers that address poverty through funding from the U.S. Department of Health and Human Services. The center is a national and interdisciplinary that seeks to advance the understanding of what it means to be poor in America. Many resources are available as links through the website. Sources include scholarly papers, newsletters, policy briefs, research summaries, and online books and reports that study and analyze the epidemic of poverty in the United States. This source is relevant to our research topic because it will lend itself as an invaluable link to a number of research resources that we can use in the design and implementation of our local study. Through finding parallel and conflicting national trends in poverty statistics, we will be better equipped to analyze our data on a local, county-wide level.

Lampman, Jane (2007, 19 Nov). *Needy get a smaller slice of charity. The Christian Science Monitor*, p. 13.

[3] Article places current discussions regarding future of American philanthropy against assumptions made by donors as to which causes garner the most financial support. Article includes several references to research organizations and specific studies regarding donor practices and motivations, several of which are cited in this bibliography. Online version of article includes link to sortable table of 50 largest US charities ranked by total income (<http://www.csmonitor.com/cgibin/guidetogiving/charity.pl>).

Levy, Reynold (1999). *Give and take: a candid account of corporate philanthropy*. Boston: Harvard Business School Press.

[5] Author discusses interplay between corporate philanthropic foundations and the non-profit organizations to which they donate. Since our focus is on individual philanthropy, this book will not likely be of much assistance at this time.

National Poverty Center at the University of Michigan. <http://npc.umich.edu/>

[1] The National Poverty Center at the University of Michigan is a similar resource to the Joint Center for Poverty Research. It is a site that has compiled a number of studies and scholarly research pertaining to the topic of poverty. The site provides links to publications, facts, events, multimedia sources, and people who are concerned with national poverty. The National Poverty Center is funded by the U.S. Department of Social and Health Services and aims to promote new research, inform the policy community, and train novice researchers. This cite is a relevant resource because their focus is to aid in the research of poverty statistics and trends. Again, looking at national trends will help give us perspective on how our local research fits in with a larger framework. Through promoting and supporting novice researchers, the National Poverty Center provides a number of opportunities for partnerships with people around the nation that are concerned with poverty.

Neumann, Lawrence W (2006). *Social Research Methods: Qualitative and Quantitative Approaches*. Boston: Pearson Publishing.

[2] Lawrence Neuman's Social Research Methods: Qualitative and Quantitative Approaches is a guidebook that will be used throughout our year-long research project. This work explains the foundations of social research, guides the reader through the planning and preparation process of their research, delineates the differences between quantitative and qualitative research methods, collection and analysis, and suggests some effective communication strategies when working with respondents. Neuman's book is an exhaustive work that attempt to encompass most (if not all) of the major theories, history, and practices of social research. It is an ambitious undertaking; it may be argued that it is too ambitious of an endeavor for a single author or piece of work. This book is relevant to our research topic because it will serve as a guide throughout our research process. When a problem or question is confronted during the design, collection, or analysis of our project, we may turn to Social Research Methods for some perspective or a possible answer to our dilemma.

Odendahl, Theresa (1990). *Charity Begins at Home: Generosity and Self-Interest Among the Philanthropic Elite*. New York: Basic Books.

[3] Theresa Odendahl, conducting a study as a faculty member at Yale University examined the giving tendencies of mainly conservative, high income people in her community; she termed this subgroup the 'philanthropic elite'. She presented her findings in her book Charity Begins at Home. She begins by investigating the attributes, behavior, lifestyle, and values shared by the philanthropic elite. Her study is continued by examining the cultural differences between some of these elite members of society (i.e. philanthropists with "old money", men and women, self-made millionaires, and Jewish people). Her book is concluded with an assessment of the future of philanthropic behavior and activity in the United States. She speculates that the emergence of public foundations, social change, and women's funds will challenge elite charity control and its corollaries. She ends her analysis by arguing that despite its inherently conservative

tendencies, philanthropy can and does offer innovative solutions to social problems as long as government strives to take care of society's basic human needs. This book is a relevant resource to our research topic because it represents a unique perspective on charitable giving. The analysis and critical observations of the giving patterns of conservative well-to-do givers will give us an insight into the perspective of those particular philanthropists. After reading Odendahl's book, we will be better informed how to interact with conservative philanthropists and philanthropic organizations.

Ryden, David K. and Polet, Jeffrey (2005). *Sanctioning Religion? Politics, Law and Faith-Based Public Services*. London: Lynne Rienner Publishers.

[3] Ryden and Polet give a current history and framework to faith-based public service in their book *Sanctioning Religion*. Specifically, they analyze the recent rise of a faith-based political movement during the current Bush Administration. In their work they pose some interesting questions: what are the relevant themes, lessons, and observations raised by a particular program, and how does it fit within the established constitutional law? What are the main issues pertaining to public sector—religious sector interaction? Throughout their book, they delve into a number of issues that are raised when government enacted faith-based programs are presented. Should philanthropy of any kind be formally supported by government, even when it has underlying faith or religious tones? Where does the separation of church and state fit into this framework? This book is relevant to our research topic because it present the background and some theoretical perspective to the idea of religious philanthropy. It begs questions that concern the support of religious philanthropy and government support of that philanthropy. *Sanctioning Religion* is a source that will possibly be used when we are working with faith-based charitable organizations that are seeking government support; whether that support be official or second-hand in nature.

Schiff, Jerald (1990). *Charitable giving and government policy: an economic analysis*. Westport, CT: Greenwood Press.

[3] Jerald Schiff discusses several policy changes that directly affect the behavior and health of the charitable sector of the economy in the 1980s in *Charitable Giving and Government Policy*. Specifically, Schiff discusses the effects of the sharp reduction in the rate of growth of governmental social welfare spending during the decade and the overt and hidden effects of the Tax Reform Act of 1986. Throughout his study, the author looks at why people give, presents an economic analysis of various forms of volunteering, and official and unofficial government support of philanthropy. This book is relevant to our topic because it again lends some historical perspective to giving patterns present in American Society. It helps us understand some of the government's involvement and support of certain types of giving. It also presents an analysis of many of the dominant giving patterns of the 1980s. By looking to past trends, we will be more equipped to analyze the trends and patterns of today's giving and volunteerism.

Steinberg, Kathryn S. and Rooney, Patrick M. (2002). *America gives: survey of Americans' generosity after September 11*. Indianapolis, IN: Center on Philanthropy at Indiana University.

[3] Very clear picture of how Americans responded in voluntary and philanthropic ways following the attacks of September 11, 2001. Will be interesting to compare the findings

of this study to those of other organizations that seek to profile characteristics and motivators for citizens' generosity.

“Unlocking Charitable Giving: Hearing before the Subcommittee on Rural Enterprises, Agriculture and Technology” (May 25, 2006). Washington, D.C.: US Government Printing Office.

[3] The text of this hearing presented in May of 2006 discusses the Charitable Giving Act of 2005. This act was presented by Congressman Roy Blunt and aims to leverage new support and resources for a broad range of community and faith-based groups from the private sector. It is a tax bill that is in concert with President Bush's faith-based and community initiative. It would provide tax incentives and other measures to encourage charitable giving by individuals and corporations. It would also allow the people that do not itemize on their tax returns the opportunity to deduct a portion of their charitable giving. This document is relevant to our research topic because it will supplement some of our understanding of how the U.S. government supports different forms of philanthropy. While Sanctioning Religion gives a historical perspective to the current administrations policies surrounding giving, this hearing illustrates an example as to how the government is influencing giving by offering specific incentives to specific forms of philanthropy.

Wagner, David (2000). *What's love got to do with it? A critical look at American charity*. New York: The New Press.

[5] Author argues that individual philanthropy in America provides cover for a very low level of publicly-provided social supports. While a very interesting argument to explore, the book does not provide resources for our study as currently envisioned.

West Coast Poverty Center at the University of Washington. <http://wcpc.washington.edu/>

[1] The West Coast Poverty Center is in partnership with the University of Washington and is working to increase knowledge and awareness of the causes of poverty and effective approaches to reducing it on the west coast. The site provides links to publications, research topics, labor markets, news archives, demographics, policies and programs all specific to the west coast. It working in conjunction with the University of Washington and describes and provides links to a number of research centers within the university that are studying poverty on a relatively local basis. This site is relevant to our topic because it provides a connection to a number of *local* resources that could prove useful throughout our research endeavor. Our intent is to uncover trends, reasons behind and motivations for charitable giving within Thurston County and the locality of many resources available through this site should prove invaluable.

Wolpert, Julian (1993). *Patterns of generosity in America: who's holding the safety net?* New York: Twentieth Century Fund Press.

[3] Julian Wolpert examines different pattern of giving in America and looks at the different options available to nonprofit organizations and philanthropic individuals when the economy or government policies shift dramatically. Specifically, Wolpert speaks to the effect that the decentralization of government domestic programs have on philanthropy. He argues that while many were initially optimistic at this decentralization, it produced mixed and uneven results. He maintains that selective recentralization will

help guarantee nationally adequate safety nets and quality to organizations attempting to address and alleviate poverty. This book is relevant to our research topic because it presents an informed discussion on the impacts of government policy shift to the nonprofit sector. It is instrumental to be familiar with the political and social landscape of the issue that you are researching. Wolpert's work will help provide a backdrop and aid in our understanding of the politics behind social giving.

Yin, Robert K. (2003). *Case Study Research: Design and Methods*. London: Sage Publications.

[2] Robert K. Yin's Case Study Research is yet another book that we intend to turn to multiple times when designing, conducting, and analyzing our research. Yin provides advice for researchers employing the case study method. Included are tips on problem definition, design, data collection, data analysis, composition, and reporting. He discusses the optimal skills that an effective case study investigator should possess, as well as gives a number of examples of successful and unsuccessful case study endeavors. Yin's book is relevant to our research topic because we will be employing the case study method throughout our research project. It will serve as a source to turn to when we encounter difficulty in our research as well as help design our study in an effective and empirically testable manner.