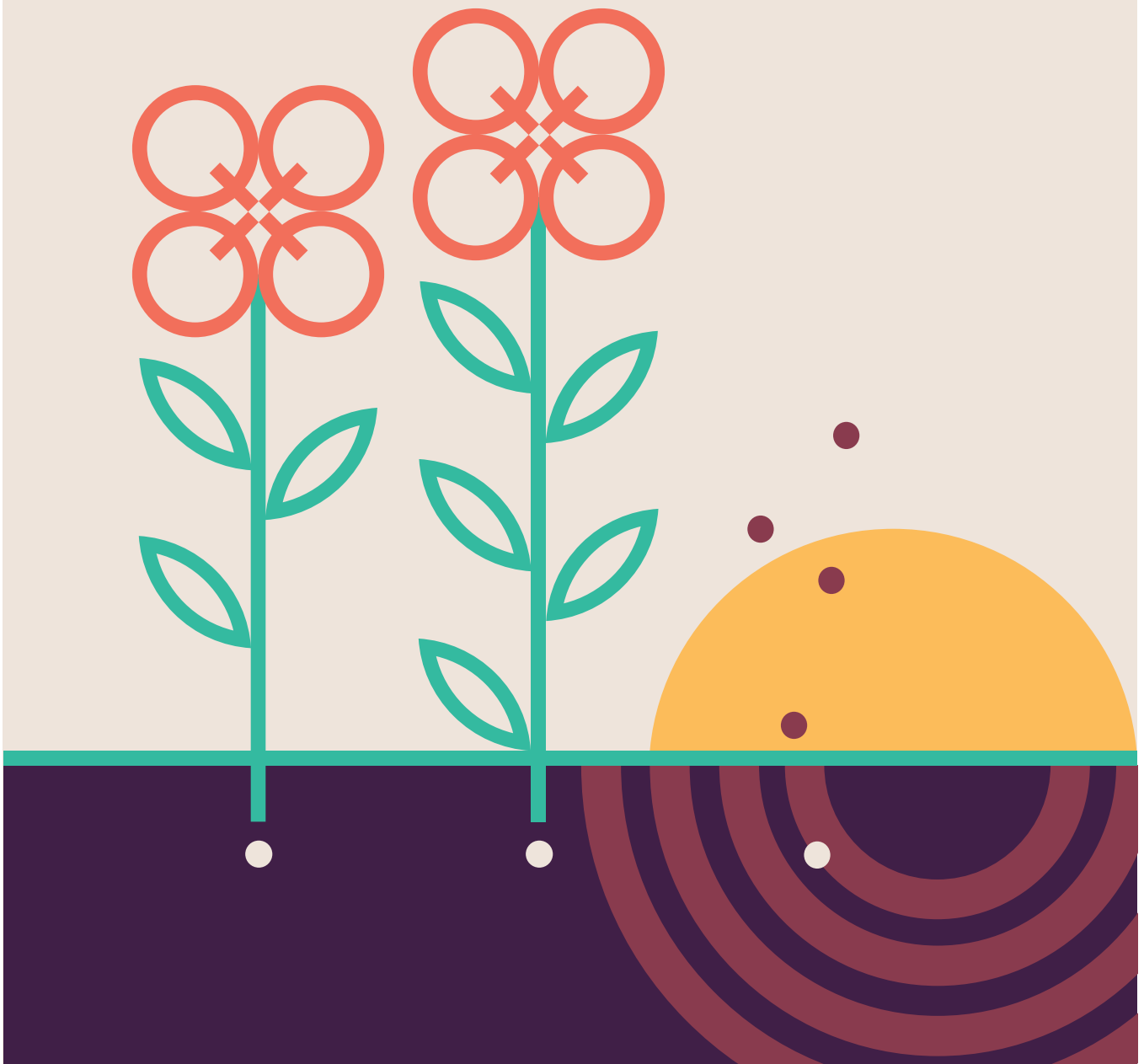
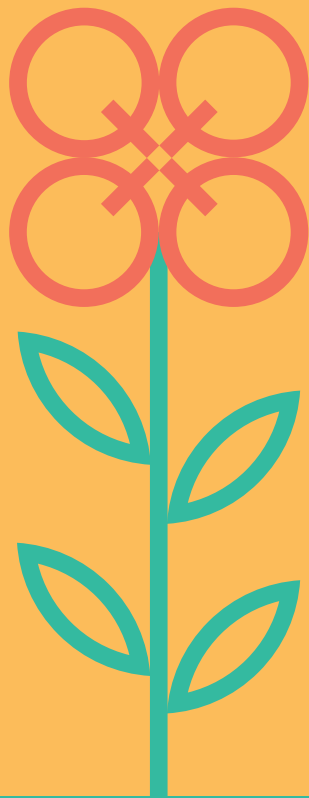


# Philanthropy in the West of England

Vital Signs 2022





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### What is Vital Signs?

Quartet's Vital Signs reports are designed to provide useful information on our region, to stimulate discussion on issues that matter, and to guide philanthropic giving in the West of England.

Originating in Canada, the Vital Signs model has since spread to community foundations all over the world. Community foundations across the UK take part every year, each producing a detailed report on their area and a guide for philanthropy based on the findings.

In line with the Vital Signs model, our reports contain findings from publicly available data and robust research, the results of a community survey and case studies. Every three years we review all of the social needs data on our area around ten key Vital Signs themes (see [www.quartetcf.org.uk/news-and-reports/vital-signs](http://www.quartetcf.org.uk/news-and-reports/vital-signs)) and in the intervening years we focus in on one or two relevant issues in more detail, as for this report. Our previous report focused on the local impact of climate change and how philanthropy can help. Find it at [www.quartetcf.org.uk/news-and-reports/vital-signs2021](http://www.quartetcf.org.uk/news-and-reports/vital-signs2021).



# Celebrating giving

This year marks 35 years of Quartet Community Foundation. It seems timely to take this moment to reflect on the role of philanthropy, the approach we take, and the impact of the funding we have worked with philanthropists to distribute to date.

Every day of our 35 years we have witnessed the extraordinary generosity of people in the West of England. With this report, we aim to review what is known about philanthropy and giving, locally and nationally, expand our understanding where we can, and generate new discussion on philanthropy in our area.

We're the community foundation for the West of England, covering Bath & North East Somerset, Bristol, North Somerset and South Gloucestershire. We exist to champion local philanthropy and place-based giving. Our model centres on building our endowment fund, an independent resource to support our communities long into the future. We help local people work together by building long-term, trusted relationships with our communities, and pooling knowledge, talents and resources for the mutual benefit of all who live here. This is a 'community philanthropy' approach and we strongly believe in its value.

This model works best when everyone can get involved and contribute. Nationally, the number of people giving to charity has been falling. This leaves a smaller number of highly committed givers to do more to meet the needs of our time. In the context of austerity and with demands on the charitable sector rising, this is unsustainable. So it's crucial that we celebrate philanthropy and improve it, to foster an inclusive culture that can engage more people in giving.

To do this we need to explore the state of philanthropy and giving now, its successes and pitfalls, and to imagine what we'd like to see for philanthropy in the future.

“

**I think local giving should really get more awareness – I think more people would be prepared to give locally if they understood the need and what local charities do.**

”

— Philanthropy survey respondent #28<sup>1</sup>



# Defining philanthropy

'Philanthropy' is a word with a simple idea at its heart. In essence it means 'love of humankind' and refers to actions taken to help others, especially through giving money.

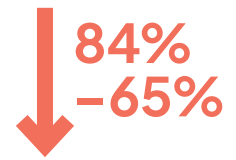
When we talk about philanthropy, we mean the funding from individual donors, private trusts and foundations that goes toward charitable causes. This covers a diverse range of gifts and activities, from education and the arts to debt advice and food banks.

While highly supportive of charity in general, the UK public has mixed views about philanthropists, which may explain why some people have difficulties with the word.<sup>2</sup> It has come to be associated with historic and outdated modes of giving, where those in need were often patronised and disempowered. For some it also evokes complex feelings about the ultra-wealthy and the growing inequality we see globally.<sup>3</sup>

We thought hard before deciding to stand by the term 'philanthropy' at Quartet. We know that lots of hugely generous people don't feel an affinity for the word and don't see themselves as philanthropists. This may be due to its association with people donating vast sums. But as MacKenzie Scott recently put it, 'half the beauty of the original meaning of "philanthropy" was in its breadth'.<sup>4</sup> We agree and we think anyone can be a philanthropist. The level of engagement, through thoughtful or planned giving, matters just as much as the size of the gift.

**...a small core of very generous people are giving the lion's share of the funding.**

## Vital statistics



The UK is a generous country, ranking consistently in the worldwide top ten countries for the proportion of people donating money, despite recent decreases. We're now 6th,<sup>5</sup> but an average of the previous ten years had placed us 2nd.<sup>6</sup>

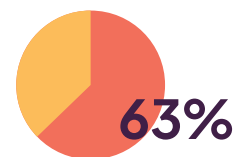
In line with national trends, the number of people who report donating in a given month in the South West has steadily dropped, from 84% in 2013/14 to 65% in 2020/21.<sup>7</sup> The average monthly donation varies between studies, ranging from £27<sup>7</sup> to £67.<sup>8</sup>

## 4th highest

There are 1.5–2million wealthy families in the South West, the fourth highest in the UK, after London, the East, and the South East.<sup>9</sup>

# 1%

Research shows that people with wealth regard donating around 1% of the value of their assets each year as the threshold for being 'generous'.<sup>10</sup>

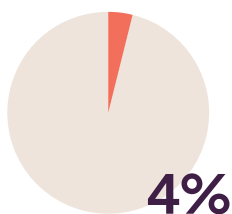


Studies vary but all agree that a small core of very generous people are giving the lion's share of the funding. One study suggests that nearly two-thirds (63%) of the value of donations by the UK's top earners comes from just 1% of donors.<sup>10</sup>



## £19.6 billion

**Philanthropy is important:** latest figures (2018–19) show that the support charities receive from individual giving (£19.6b) far outweighs the funding the sector receives in grants and contracts from the government (£15.8b).<sup>10</sup>



**National charities are the most prolific fundraisers:** 68% of people responding to our survey report receiving requests for support from national charities often or very often, compared with 41% for local charities.<sup>1</sup>

Big national and international charities receive a huge percentage of the sector's income. Although 80% of charities are relatively small, they account for **just 4% of the sector's income overall.**<sup>11</sup>

*giftaid it*  
**500m** ↓

Nearly a quarter (23%) of eligible donors do not make use of Gift Aid when giving to charity, so each year **around £500m of Gift Aid goes unclaimed.**<sup>12</sup> It can be tricky for charities to claim Gift Aid, meaning that smaller organisations, for whom it's most important, often miss out.<sup>10</sup>

## The role of philanthropy

Philanthropy stands independent of politics and the short-term thinking that can dominate statutory funding cycles, enabling the long-term change that communities wish to see. Philanthropy's freedom to take risks and to support those most marginalised will always be needed in any caring and progressive society.

Some people emphasise the needs and wishes of donors themselves, while others emphasise the needs of society and the public benefit of the gift.<sup>13</sup> Some place philanthropy in opposition to things they feel could or should be funded by the state. It is a complex arena.

What is clear is that our charitable organisations, so crucial for enriching and supporting our communities, are deeply reliant on income from philanthropic giving and this is especially true of the smaller, local organisations we serve.

“

**It is absolutely vital (...) if it wasn't for the funders we wouldn't be able to continue.**

”

— Philanthropy research participant organisation<sup>20</sup>

“

**As someone who also raises money for charity, I think that in many cases regular giving is almost as important as the amount.**

”

— Philanthropy survey respondent #28<sup>1</sup>



# Challenges in philanthropy

The coronavirus pandemic and the global Black Lives Matter movement sparked important discussions about inequality in society and how we should address it. In the UK's philanthropy and grant-making sector, this has raised issues around the origins of private wealth, how power is exercised and what philanthropic giving really is or could be. Philanthropy has been charged with being undemocratic, deaf to the needs of communities and overly bureaucratic.

Grant-makers like Quartet have been examining what we do and how we do it. Movements such as #charitysowhite have challenged our assumptions about philanthropy, arguing that the current system upholds the very inequalities it aims to address. Funders and donors are invited to pay a lot more attention to how decisions are made, and to who is and is not receiving our funding. This will ensure that the money we give will really bring about the change we wish to see.

“

**It is impossible for a charity to respond to all donors as they expect. Those that fail to give recognition and to keep in touch will lose support. But so sometimes will those which over communicate.”**

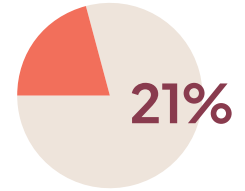
”

— Philanthropy survey respondent #112<sup>1</sup>

## Vital statistics



Of our respondents, 1 in 6 (16%) expressed irritation with donation requests by organisations to which they'd already donated or in ways that felt impersonal or pressured.<sup>1</sup>



When asked if there's anything they would like to be different about their experience of giving, **a fifth (21%) of our respondents** said they'd like more information about how the funding was spent and the impact the work had.<sup>1</sup>



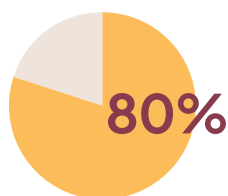
**We lack clarity about what major giving looks like in this country.** A typical giving range for wealthy givers might be £1,000–£4,000 a year, but split between 5 or 6 charities and donated monthly, organisations can easily fail to recognise the need to build stronger relationships with these donors.<sup>14</sup>



Research shows how valuable unrestricted funding (funding that can be spent on anything) is to charities. Given the choice, on average charities would choose an unrestricted grant of £70k over a restricted-purpose grant of £100k.<sup>15</sup>



New initiatives among funders aim to tackle inequities in the funding system: IVAR has established the 'open and trusting grant-makers' initiative, joined by over 100 grant-makers, to commit funders to listening to groups' needs and making real change.<sup>16</sup>



In a recent survey of grant-making organisations, almost 80% agreed that if organisations have benefited from wealth generated by harmful or exploitative practices, they should make reparations. **Only 8% felt that their organisation was doing enough to fight inequity.**<sup>17</sup>

Charities enjoy the confidence of the public as the third most trusted group after doctors and the police. **Expectations of charities are consistently high,** and issues with single charities highlighted in the media have the capacity to damage the credibility of the charity sector as a whole.<sup>18</sup>

**Reasons for giving or not giving are fairly consistent at different wealth levels.**

Internationally, when asked why they don't give more, people with large amounts of wealth (£5m+) said:

- **28%** They have other financial obligations
- **25%** They distrust how charities are run
- **23%** They don't have enough knowledge of charities

14

Nationally, when asked what would encourage people to give more, the top three answers given by the public were:

- **35%** Having more money
- **28%** Confidence that the charity or organisation uses the money efficiently
- **24%** Knowing that money is going to be spent locally

7

Critiques of philanthropy and the funding system that has grown around it are not new, but they are important. There is now huge pressure on charities to win donors' approval, attract sufficient funding and demonstrate their impact. We hold our charitable sector to very high standards but we don't always support or resource groups properly to meet them. On the other side, donors can be put off by too many communications or too few, and a lack of clarity on where exactly their money has gone. Greater dialogue, trust and transparency is needed on all sides.

**Critiques of philanthropy and the funding system that has grown around it are not new, but they are important.**

But there is a lot to be hopeful about. There is nothing inevitable about the ways we give; this has always shifted with changing times and needs. As part of an international network of community foundations, we see first-hand how different people across the world support their communities and are privileged to take a broad and long-term view.

There are always things to learn and ways to improve. The ability to evolve and adapt is, we think, one of philanthropy's great strengths. And philanthropy is needed now more than ever.



**Small peer-led support organisations should be able to access local funding without having to compete with larger organisations who have specialist staff to complete funding bids – it becomes an unfair system for small groups who are critical in the community.**



— Philanthropy survey respondent #130<sup>1</sup>





# Philanthropy in action

Taking a place-based, community philanthropy approach, as community foundations do, harnesses the best of philanthropy. Through bringing communities together to share knowledge, aims and resources, we can support a more connected and resilient region.

This locally-focused approach helps to address the wider critiques of philanthropy. Donors can collaborate over shared goals, see the impact of their funding, build relationships with people doing the work and adjust their focus as needs shift. And crucially, trust is built and funding programmes are designed with local communities in mind, avoiding some of the pitfalls of a 'one-size fits-all' mindset that can make national or international funding streams less effective than they might be.

This can be especially valuable in the most disadvantaged areas which, contrary to expectations, often have the lowest numbers of charities per head than other areas.<sup>19</sup> These areas require a much longer-term approach to building community assets, leadership and engagement than isolated grants can provide.

“

**I think, a bit like us, Quartet has been around for a very long time in the city. It takes a long time to try and understand the city – the nuances, the differences and the similarities between different neighbourhoods.**

”

—Philanthropy research participant organisation<sup>20</sup>

## Vital statistics



In Quartet's 35 years we've received an incredible £47m in donations to our endowment fund and £65m in donations for immediate need, the majority from local people and organisations wanting to support their communities.



Of the people we surveyed locally, 99% reported donating money to charitable organisations in any typical year, ranging from less than £100 up to £200,000 (with median giving of £500-999).<sup>1</sup>



89% reported having particular causes or organisations that they've been donating to for a year or more, indicating high engagement with giving.<sup>1</sup>



71% of people responding to our survey also reported volunteering for local charitable or community organisations.<sup>1</sup>

## 84% vs 31%

Perhaps unsurprisingly, Quartet's fund holders are 2-3 times more likely to give to local charities (84%) than to national ones (31%). This indicates the efficacy of a locally-focused approach in getting resources to smaller charities.<sup>1</sup>





**9/10** **92%**



Quartet's team carefully evaluates every project we support, and due to careful vetting, **nearly 9 out of 10 of the grants** we give out have been rated very good or excellent at achieving their objectives.<sup>20</sup>

Through funding and support, philanthropy has given many organisations the freedom to experiment with new approaches. Of pilot projects supported by Quartet, 92% continue after our funding ends.<sup>20</sup>

**59%**

**£24m**

360Giving collates data from participating funders across the country. Their data shows that since 2016, 59% of the grants awarded in our area have been distributed by Quartet (equal to 12% of their overall value).<sup>21</sup>

In addition to Quartet there are around 104 other grant-making trusts registered in the West of England, with their most recent combined annual expenditure totalling nearly £24m.<sup>22</sup>

“

**We feel lucky that Quartet is really embedded in the ecosystem of Bristol's voluntary sector.**

”

—Philanthropy research participant organisation<sup>20</sup>

## The impact of philanthropy in Bristol

The complexities of our funding system mean that the way we look at impact tends to be quite short term. Students at the University of Bristol have been researching the long-term or cumulative impact that Quartet's funding, and philanthropy more generally, has had in Bristol over time.

Preliminary findings show that philanthropy has played a key role in the growth and sustainability of Bristol's community sector, supporting organisations as they improve their services and respond to new challenges.

### Philanthropy has played a key role in the growth and sustainability of Bristol's community sector.

The impacts seem to be strongest when funders develop a relationship of trust and flexibility with the organisations they support and take a community-led approach to social change.<sup>20</sup>

### Long-term support for Avonmouth and Lawrence Weston

One area of focus for the study is Avonmouth and Lawrence Weston, where Quartet has built relationships with key community organisations over decades and awarded grants worth over £1m. For example, in 2013 we made a grant for Ambition Lawrence Weston to develop its first community plan, engaging residents in deciding what they wanted for their community's future. This has provided a blueprint for local action that we have supported steadily over the years. As a result, Lawrence Weston has developed valuable community assets, including a community energy project which will generate sustainable income to support its local community organisations.



# The future of philanthropy

The challenges facing our communities are many and philanthropy has never been more needed. From the cost of living crisis to climate change, there are challenges ahead that our community sector needs sustained help to meet. Experts argue that we must develop our giving culture here in the UK. Rather than shy away from talking about our giving, we must share and celebrate it. A growth in philanthropy would go a long way towards providing the extra support our organisations need.

The pandemic showed us that things can be done differently, and it has given many of us a renewed sense of community. We must build on the positive trends that have taken hold in the philanthropy and grant-making sector. New ways of working that have been more based on relationships and trust have proven successful. Funders, donors and groups are increasingly seeing the benefit of working collaboratively to meet common goals. This is about collaboration over competition and committing our time, funding and energy for the long-term. We think this is the future.

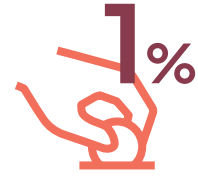
## Collaboration over competition and committing for the long term. This is the future for philanthropy.

There is work to do to ensure that the future of philanthropy is inclusive, effective and equitable. There are hugely generous people giving in ways that are rarely counted in surveys or statistics, including the mutual support that exists among lower-income communities.<sup>29</sup> Here at Quartet, we want to make sure we're here for everyone who wants to support our communities: for people who are able to give now, for the next generation of givers, and for generous people who have felt the term 'philanthropist' would never apply to them. This is our goal for community philanthropy in the West of England.

### Vital statistics



**An increase in philanthropy is needed urgently** if we are to meet the globally-agreed Sustainable Development Goals. It is estimated this will cost \$5–7 trillion each year, with a current gap in funding of \$2.5 trillion.<sup>3</sup>



If everyone in the top 1% of UK earners, people earning £175,000 a year before tax, **gave 1% of their incomes to charity**, it would provide an extra £1.4bn for the charity sector each year.<sup>10</sup>

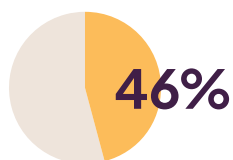


Worldwide there is a growth in giving circles, places where people of all means come together to enjoy giving collectively. This movement aims to grow local philanthropy and make it **more accessible and democratic**, harnessing people's 'everyday generosity' and raising awareness of local projects.<sup>23</sup>



**Different communities have different giving practices.** For example, the annual philanthropic giving of the Pakistani diaspora in the UK, including the religious practice of giving zakat, totals £1.25 billion each year, of which £0.6 billion is distributed in the UK. A joined-up, inclusive approach to local philanthropy will benefit everyone.<sup>24</sup>

A study of high-earning millennials shows that their giving tends to be more ad hoc than planned, but they are interested in philanthropy advice.<sup>25</sup>



Nearly half (46%) of community organisations in B&NES are working at 100% capacity or over (up from 32% in 2020) and report a range of unmet needs. Reasons for this unmet need included lack of funding and volunteers, and the impact of COVID restrictions.<sup>26</sup>



**Quartet has always aimed to be collaborative.** But like many funders,<sup>26</sup> we increasingly aim to work in partnership with others, bringing funders, groups, philanthropists and others together to align and make best use of our collective resources.



We asked people locally which, if any, of the following philanthropy should be increasing support for: 62% chose longer-term funding; 58% chose climate change, resilience and nature recovery; 48% chose organisations' running costs; and 45% chose diversity and inclusion.<sup>1</sup>



A study of wealthy people in the UK showed that those receiving philanthropy advice gave nearly twice as much to good causes as people not receiving advice.<sup>27</sup>

Developing norms around philanthropy advice and planned giving could help pave the way for future growth in giving.<sup>13</sup>

## Funding community anchor organisations in Bath and North East Somerset

Quartet's Funding the Future programme, a collaboration of philanthropists, focused on supporting community anchor organisations throughout Bristol. Following the success of this programme we, along with others, commissioned research in Bath and North East Somerset in 2018 to explore the role of community anchor organisations in Twerton and Whiteway, Bath.

The research recommended developing a network of existing community organisations in Twerton ward. Local groups were interested but felt that it wasn't the right time for them to take this on. But there were visits to two areas of Bristol, Southmead and Knowle West, that were already engaged in successful, area-wide collaborations to ask questions and learn from them.

In 2020, community organisations felt like the time was right and established the Twerton and Whiteway Community Network, including Bath City Farm, Southside Family Project, Bath City Football Club and the Foundation, Youth Connect SW, First Steps Bath, Time Bank Plus, and local churches. Quartet gave them a grant of £9,500 to support the development of the network including building local resident involvement and capacity. This supported the network's community consultation to engage residents in planning the future they want for their area.

“

**Would love to see more collective giving initiatives grow.**

”

— Philanthropy survey respondent #148<sup>1</sup>



# Vital steps



We believe engaged, local giving is enriching for everyone. Local community philanthropy builds strong communities where everyone has the opportunity to reach their potential. Its focus is on us all taking responsibility for our charitable and community organisations, ensuring they have the resources they need to fill gaps, meet needs and enhance all of our lives. The community response to the coronavirus pandemic demonstrated the incredible generosity and care in our communities; we need to harness this connection and generosity to ensure we are prepared and ready for future challenges.

We want to build a movement to increase local philanthropy and we want to ensure that philanthropic giving in our area is as effective as it can be. Our endowment fund sits at the heart of our work, built from the contributions of hundreds of generous people over 35 years. It is a resource that our communities can draw strength from into the future.

**But if we are to strengthen our communities, we need people to give more and to give well.**

## For professional advisers

There is a reported lack of philanthropy advice available among professional advisers. Do ask your clients about their interest in philanthropic giving, and feel free to contact Quartet if we can help you or your clients to learn more.



Here's how you can help:

## For philanthropists

- Support local. There is an important role for national and international charities but for work closer to home, local groups are deeply embedded in communities and really understand how best to support them.
- Commit to long-term relationships with community organisations. This provides security for them and gives time for donors to develop their knowledge and trust in an organisation's expertise and impact.
- If you are a UK taxpayer, make sure you enable Gift Aid to be claimed on your donations. This is hugely valuable to smaller community organisations and benefits higher-rate taxpayers too.
- Help establish a strong giving culture in the UK by talking openly about your giving with family and friends. 1% of annual income could be a useful benchmark to discuss.

## For funders

- Individual donors and funders alike must be prepared to resource the things they expect from our charities: if we want community organisations to be well run, they'll need secure, core funding; if we want to understand their impact, we must provide funding for evaluation; if we want them to collaborate, we must resource additional time away from delivering services.
- Provide time, space and attention for organisations to be honest about their needs and the constraints that they work within.
- Make best use of data, collaborate with others and engage in dialogue to ensure your funding reaches the people and places where it is needed the most. Quartet is always happy to learn and to share our ideas and expertise, so whether you work with us or not, feel free to come and talk to us.

Please share this report far and wide. We want to start a conversation about how we can encourage more local giving and make sure the way we work with donors and community organisations is as inclusive and effective as possible.



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Between March and April 2022 we ran an online survey asking about people's practices and experience of philanthropy and giving in the West of England. We sent the survey to our contacts, shared it on social media and encouraged people to forward it on to anyone living locally who might be interested. We had 228 eligible responses. The results of the analysis and quotes from participants can be found throughout this report.

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This report was researched and written by our Head of Research & Learning, Lucy Gilbert. If you have any questions or comments on the findings, please get in touch: [lucy.gilbert@quartetcf.org.uk](mailto:lucy.gilbert@quartetcf.org.uk) 0117 989 7710

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# Contact us

If you want to help develop local giving or think you'd like to do more for your local area, please get in touch with our Philanthropy Director, Ronnie Brown:

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We'd love to hear your ideas on the future of philanthropy. If there's something you think we should explore doing differently, get in touch with our CEO, Suzanne Rolt:

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All feedback on our reports is really valuable to us.

Send your thoughts to [vitalsigns@quartetcf.org.uk](mailto:vitalsigns@quartetcf.org.uk)

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