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**Local Government & Philanthropists
Shaping a New Funding Model**



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Communities
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An Roinn Tithíochta, Pleanála,
Pobail agus Rialtais Áitiúil
Department of Housing, Planning,
Community and Local Government

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Foreword

Ireland has, in recent years, debated much on the structures of local government, on the funding of its services and indeed on the range of services for which it is responsible. It is, in common with its counterparts internationally, highly contextual and therefore its structure, services and ideology vary significantly around the globe and indeed within the Island of Ireland itself. In some cases local government might have highly constrained spending patterns providing only basic services, while at the other end of the spectrum local government can provide a wide range of additional community and cultural development services.

It is, perhaps, because of this variance that local government and philanthropists have a shared interest in the development of civil society and indeed the development of local communities made up of empowered individuals taking responsibility for addressing local needs and problems. It would therefore make sense for them to work together and assist each other, where possible, in developing this at a local and/or national level.

The relationship between philanthropy, public sector and the market is one which is widely debated in the context of civil society. Former Ford Foundation president Franklin Thomas saw philanthropy as the “research and development arm of society” whereby new ideas were tested and if successful, would be embraced by government who would assume responsibility for their widespread implementation through government agencies. (Letts, Ryan, & Grossman).

It could be argued that a key role of philanthropy is to strategically bring together civil society and governments – philanthropists bring innovative ideas and skills to public authorities in terms of both the design of policies and the delivery of services to the public. This collaboration also enables better access to information and resources that increase their effectiveness. It also ensures that both public and private institutions are working together in a shared community towards common goals, avoiding duplication of effort and ensuring maximum impact. From the local government side, independent funders like community foundations are an attractive partner and collaborator because they can build partnerships across sectors and assist in effective targeting and increasing of funding.

Is there then a role for Philanthropy in assisting Local Authorities build better communities across the island of Ireland? Can Local Authorities on our island be the drivers and establish philanthropic trusts / funds for the long-term benefit of their local communities and if so, what might this look like, and indeed how would they go about such a task? Can we encourage Local Authorities to think creatively and outside of the box in order to foster new partnerships which will assist in the longer term development of their regions?

This is the start of a debate which has advanced in some areas of the island and has taken different forms in others. This work has been about establishing if, ultimately, an All-Island Philanthropy Strategy could be a realistic aspiration? We look forward to the on-going debate that this work has commenced.

Philomena Poole & Liam Hannaway



All-Island Local Authority Forum

A conference entitled "**Local Authorities Building Stronger Communities - the Role of Philanthropy and Alternative Funding Initiatives**" took place in Dublin Castle on the 25th February 2016. This conference was organised by the **All-Island Local Authority Forum**, which is a strategic partnership comprising Chief Executives from the **Society of Local Authority Chief Executives, NI (SOLACE NI)** and Chief Executives from the **County and City Management Association (CCMA)**. The Local Authority Forum is the only cross-border local authority group operating at Chief Executive level and comprises ten members. The aim of the Forum is to progress and develop meaningful cross-border relationships within the local government sector. The Forum provides opportunities for cross-border co-operation on a range of issues of mutual interest to both administrations and the work of the Forum is developed through practical joint projects and the sharing of knowledge, expertise and best practice.

The mission statement for the All-Island Local Authority Forum is as follows:

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“To advance mutual understanding by promoting practical co-operation between local authorities on the island of Ireland, through maximising shared learning and the production of tangible benefits for services and local communities”

”

The work of the Forum currently focuses on six key areas as follows: Strategic/Development Planning, Community Planning & Place Shaping, Tourism, Shared Services, Leadership and Housing.

Further information on the work of the Forum is available at www.cooperationireland.org.



Common Threads Throughout the Conference

The February conference brought together some of the central players in philanthropy in Ireland including Kingsley Aikins, CEO of **Diaspora Matters**, Eilis Murray, Executive Director of **Philanthropy Ireland**, Mary Sutton, Country Director of **Atlantic Philanthropies**, Lauri McCusker of the **Fermanagh Trust** and Jackie Harrison, Head of Development at **Community Foundation for Ireland**.

A recurrent theme referenced by many of the speakers at the conference was the need to craft a new Irish model of philanthropy - one suited to Irish values, needs and culture. Ireland ranks high as a giving nation - particularly *spontaneous giving* in response to crisis or disaster relief. Although not a substitute for state funding and investment in core services, philanthropic giving - particularly in planned and committed ways - could, it was suggested, make a significant difference across many areas of society including health, education, the arts and community development. When properly developed and implemented, philanthropy can develop and strengthen local assets, build local capacity and strengthen civil society. Several speakers suggested that Local Authorities in their core objectives of improved quality of life, social inclusion and economic development offer immediate parallels and connectivity with philanthropic objectives. In recent years Local Authorities have had significant change in their statutory roles. Northern and Southern authorities in Ireland have now a much stronger focus in relation to their functions concerned with economic development and quality of life. Any philanthropy programmes or initiatives from Irish Local Authorities will need to be embedded in statutory plans such as Local Economic and Community Plans and Development Plans.

“

Could a future be envisaged where the two sectors of Local Government and Philanthropy collaborate towards mutually inclusive goals and objectives?

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Emerging research indicates that place and *vibrancy of place* plays a central role in who gives what, to where in Ireland. The pull of the local area resonates very strongly with Irish donors. Pooling areas of expertise across regional authorities (anchored as they are geographically) was suggested by several speakers as a useful mechanism for leveraging philanthropic funding. **The potential of the Local Authority sector across the island to support and contribute to the visioning of a new philanthropy was seen as exciting and worth consideration.**



phi · lan · thro · pist

noun \fəˈlan(t)-thrəpɪst\

"one who makes an active effort to promote human welfare"

Why Philanthropy?

Using the springboard of the conference this document attempts to answer this question by examining the current philanthropic landscape nationally and internationally, outlining some new trends and shifts taking place in the sector and highlighting innovative new partnerships developing between local government and philanthropic organisations in Ireland.

How Philanthropy?

Finding alternative funding models for Local Authorities is topical and the time may be right to investigate and raise awareness of the potential of philanthropy as an alternative funding source. Could a future be envisaged where the two sectors of Local Government and Philanthropy collaborate towards mutually inclusive goals and objectives? This document offers some suggestions from senior figures in both sectors on how Local Authorities could begin navigating this new philanthropic landscape.

What Do We Really Mean by the Term Philanthropy?

Philanthropy is a somewhat controversial term. In the world of organised giving it has largely replaced the term 'charity' as charity has connotations of patronage and conservatism. Charity and philanthropy share similar roots: charity derives from *caritas* or loving care for one's fellow beings with 'love of mankind' being the literal meaning of philanthropy. In contemporary usage however, philanthropy is seen as more systematic and continuous than charity with philanthropy having the potential to be transformative.

The term social investment is also now being used in parallel with philanthropy. Social investment targets issues of poverty, health, the environment and basic education - but not necessarily arts and culture which were the priorities of traditional philanthropy. Internationally the Diaspora however still contribute significantly to arts and culture funding seeing them as mechanisms for the preservation of their national identity and the identity of their country of origin.

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A sea change in philanthropic giving resulting in sustained higher levels of giving by a greater number of individuals, families and foundations is being predicted for the next three decades worldwide

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Philanthropy is a particular kind of charitable giving. It is focused on the root cause of problems and making a sustainable improvement, as distinct from contributing to immediate relief.¹

¹Philanthropy Ireland www.philanthropyireland.ie

For generations, traditional philanthropy was the exclusive domain of the wealthy and powerful. Many of the great benefactors of the 19th and early 20th centuries made their fortunes from the railroad, steel, and oil industries and much of their philanthropic donations went to higher education, arts, culture and international development. The philanthropic landscape however is being changed irrevocably in the 21st century by the interplay of a number of differing social and economic factors.

Seismic Shifts in Global Philanthropy Today

Five specific factors have the potential to bring about a seismic shift in philanthropy in the second decade of the 21st century. These factors are contributing to the emergence of differing models of philanthropic engagement, new channels of giving and a strong desire to address societal issues and strengthen social capital. A sea change in philanthropic giving is being predicted which will result in sustained higher levels of giving by a greater number of individuals, families and foundations for the next three decades worldwide. These five specific shifts in contemporary philanthropy are worth exploring:

“The founders of Facebook and PayPal and other transformative technology companies are applying their particular vision to some of the world's most pressing social problems. Their drive and entrepreneurial spirit make them less concerned with the status quo and more open to disruptive innovation in their own field and in the field of philanthropy.”

Entrepreneurial Wealth

1. Entrepreneurial wealth is growing dramatically across the globe particularly in the technology field and the new entrepreneurial mindset of these next generation donors is catalyzing change and innovation in approaches to philanthropy. The founders of **Facebook** and **PayPal** and other transformative technology companies are applying their particular vision to some of the world's most pressing social problems. Their drive and entrepreneurial spirit make them less concerned with the status quo and more open to disruptive innovation in their own field and in the field of philanthropy. The scale of their wealth and their commitment to giving it away means that these philanthropists are having a significant impact on the issues they prioritise. Their innovative approach with its emphasis on data, transparency, speed and impact could mark a new chapter in philanthropic giving. Microsoft's Bill Gates paved the way with the **Bill & Melinda Gates Foundation**, to which they donated \$28 billion and which, since its foundation in 2000, has dominated tech-funded philanthropy. Almost 25% of donations by the top 50 philanthropists in the US in 2015 came from technology entrepreneurs aged 50 or younger. The largest philanthropic gift ever given in the United States was a donation in 2013 by Mark Zuckerberg and his wife Priscilla Chan of one billion dollars to the **Silicon Valley Community Foundation**. This is only the latest of many examples of philanthropists pushing sectoral boundaries in new and unexpected ways. A recent report by the **Community Foundation for Ireland**² on how Irish entrepreneurs view philanthropy identifies the latent potential of Irish entrepreneurs to engage more in Irish society - both in terms of their financial contribution but also in terms of applying their mind set and skill set to help Ireland rebuild its social capital and infrastructure.

²Giving and Gaining: How Entrepreneurs View Philanthropy in Ireland, Community Foundation For Ireland 2014

Diaspora Capital

2. Diaspora capital refers to the resources available to a country, region, city, organisation or location from their diaspora networks. These networks deliver finance, new ideas and innovative attitudes to their places of origin, ancestry or affinity. Many countries are currently devising strategies to build their business networks through diaspora capital and Ireland is leading the way with a series of public and private initiatives that will strengthen its role in this significant area of philanthropy. According to Kingsley Aikins, CEO of **Diaspora Matters, Ireland** is currently one of the top four countries internationally in terms of connecting with its diaspora. The diaspora often have business and social connections in both their host and home countries and remittances from the diaspora are increasing exponentially and were estimated globally to have reached €500 billion in 2015. Place and belonging are strong drivers in diaspora-driven philanthropy, as people who have become wealthy, begin to give back in a myriad of ways to the town or region from which they came. Irish Local Authorities recognise this and have begun to reach out to their diaspora particularly through online and social media channels. The websites mayo.ie and donegaldiaspora.ie are exemplars of how to connect with County diaspora in a vibrant and energising way.

A policy document published by the Irish government in 2015 entitled "**Global Irish: Ireland's Diaspora Policy**"³ recognises the potential philanthropic benefits to be gained from networking with the Irish abroad. It commits to supporting Local Authorities and Local Community Development Committees in seeking to identify the members of their diasporas and in developing the initiatives needed for building relationships with them. This will include the development of a toolkit for local authorities to help develop their capacities in this area. Some Local Authorities are already reaching out to their County diaspora through their Local Enterprise Offices.

“There is potential for communities and Counties in Ireland to reach out to their own diaspora and build new relationships, to benefit local and regional development. Some Counties are already active in their efforts to mobilise their respective diasporas. The work done by Donegal, Kerry, Limerick and Mayo stand out in this regard.’

Global Irish: Ireland's Diaspora Policy 2015

Venture Philanthropy

3. Another new model is venture philanthropy which uses many of the tools of venture funding to promote start-up, growth and risk-taking social ventures. Venture philanthropic projects are to be found in Australia, the USA and Europe. This type of philanthropy plays an important role in diversifying capital markets for philanthropic and social purpose organisations. Traditional grant making organisations have for some time been criticised for failing to help communities and organisations to build capacity, grow and become financially sustainable. Venture philanthropy is a response to this criticism seeking to raise funds and then deploy them with partners to maximum effect by tackling key social issues and using rigorous evaluation methods.

³ Global Irish: Ireland's Diaspora Policy, Dept of Foreign Affairs and Trade, Ireland 2015

Inspiring Scotland⁴ is an example of such an endeavour. It is a highly engaged venture philanthropy organisation, the first venture philanthropy model to grow from the voluntary sector, tailored to Scottish needs and designed and developed to transform philanthropy in Scotland. Inspiring Scotland is currently supporting the performance and programme management of fourteen **Early Years Public Social Partnerships (PSPs)** operating across Scottish Local Authorities. These PSPs involve public and third sector bodies co-designing services or interventions to deliver agreed social outcomes. This approach explicitly emphasises outcomes rather than activity.

Inter-Generational Wealth Transfer

4. Globally the last two decades have seen significant new wealth creation with a dramatic increase in the number of high net worth individuals across all continents. Alongside this is the significant global inter-generational transfer of wealth scheduled to occur as the 'baby boomer generation' pass on to their heirs a wealth transfer estimated to be worth \$59 trillion. The impact on the non-profit sector will be enormous. These funds will move into non-profit organisations from donors at all income levels, not just the wealthiest individuals. The recent Accenture report entitled **The Greater Wealth Transfer**⁵ suggests that organisations should begin planning now for the impact of this particularly by putting policies and structures in place to connect with this growing capacity in their regions for philanthropy.

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Traditional grant making organisations have for some time been criticised for failing to help communities and organisations to build capacity, grow and become financially sustainable.

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Community Philanthropy

5. A new international force in philanthropy is emerging driven by ordinary people working from the bottom up in their local communities rather than the traditional top down model. Community Philanthropy is the practice of communities mobilising capital of various kinds - financial, civic, social, human, political, and intellectual - with the aim of improving residents' lives over the long term. Community philanthropy organisations customise their programmes to fit community needs and internationally people are turning to community philanthropy in part because the practice leads to good development outcomes. Individual and institutional donors consider it an effective path to sustainability, growing a resource base for work on community issues. Three building blocks of community philanthropy have been identified by practitioners: the development and deployment of local assets, the building of local capacity and the building of people's trust in their local institutions and in each other. The resulting social capital strengthens civil society and creates a sense of local ownership of development processes and strengthens local organisations to effectively mobilise in ways other organisations often cannot. **The County Monaghan Fund** is one such example. Established in 2004, it was the first County philanthropy fund in the Republic of Ireland. Formed with the support of the **Community Foundation for Ireland** who gave a €100,000 grant to start the fund (but only if it could be matched locally which it was at the first meeting of the fund). €350,000 has been raised to date and resources continue to be targeted at the root cause of issues across Monaghan from defibrillator training to student enterprise programmes.

⁴ Inspiring Scotland www.inspiringscotland.org.uk

⁵ The Greater Wealth Transfer, Accenture, 2015

The Rich are Getting Richer

A 2015 report by economic think tank Tasc⁶ found that the income share of Ireland's top 1 per cent has almost doubled since the 1980s. That top 1 per cent now has 14.8 per cent of the country's wealth and 9 per cent of its gross income. The report also shows that while average incomes doubled in Ireland from 1975 to 2009, the average for the top 10 per cent more than tripled, and the average for the top 1 per cent went up fivefold. A report from Knight Frank⁷ in early 2016 predicted that some 22,000 millionaires will be created in Ireland over the next 10 years. It also revealed that more than 200 Irish people will enter the realm of the "ultra-high net worth individual" - those with investable assets of more than \$30 million by 2026.



22,000 millionaires will be created in Ireland by 2026



With a growth rate of 28 per cent, Ireland's rich are getting richer at a faster rate than in Spain (14 per cent), Portugal (18 per cent) and France (15 per cent). Ireland and the United Arab Emirates shared the distinction of creating new wealth at the fastest rate internationally, with the number of High Net Worth Individuals increasing by almost a quarter in both countries according to a report published in 2014 by consultancy firm Capgemini⁸ and the wealth management arm of banking group RBC. In 2014 alone in the UK 62,000 individuals entered the High Net Worth bracket bringing the overall total to 527,000 with a combined wealth estimated at almost two trillion pounds. UK research indicates that twenty-five years ago four-fifths of the wealthiest individuals had inherited their wealth and one-fifth had created their own wealth. However, the intervening decades have seen a complete reversal of this statistic. Irish wealth notably is predominantly first generational and more entrepreneurial than in many other developed countries.⁹ Wealth that is self-made rather than inherited tends to have a positive effect on philanthropy. Entrepreneurs are more inclined to be philanthropical than similarly wealthy individuals.¹⁰

The **Community Foundation For Ireland** recently surveyed Irish entrepreneurs concerning their engagement in charitable giving and their perceptions of philanthropy¹¹. The survey identifies Irish entrepreneurs as a key constituency in philanthropy with the capacity to engage more. It also recognised the strong entrepreneurial component to Ireland's economic growth. Where philanthropy was once seen as the preserve of families with inherited wealth and trust funds, in recent decades the emphasis has changed to entrepreneurial wealth. Western economies are now seeing modest growth as they emerge from the 2008 recession and other economies are experiencing profound and transformative growth. In 2015 in the USA philanthropic donations hit a record \$373 billion. According to the **CAF World Giving Index 2015**¹² participation levels for donating money have increased across all world economy types.



Wealth that is self-made rather than inherited tends to have a positive effect on philanthropy. Entrepreneurs tend to be more inclined to be philanthropic than similarly wealthy individuals



⁶ TASC www.tasc.ie

⁷ The Wealth Report 2015, www.knightfrank.com

⁸ World Wealth Report, Capgemini and RBC Management 2014

⁹ Bank of Ireland Wealth of the Nation Report, 2007

¹⁰ www.fidelitycharitable.org/docs/Entrepreneurs-and-giving-executive-summary.pdf

¹¹ Giving and Gaining: How Entrepreneurs View Philanthropy in Ireland, Community Foundation For Ireland, 2015

¹² World Giving Index 2015 www.cafonline.org

How the Irish Give - The Big Village Effect

The terms 'philanthropy' and 'philanthropist' tend to provoke mixed reactions in Ireland. Research commissioned by **Philanthropy Ireland**¹³ revealed that 52% of people in Ireland have never heard of the term 'philanthropy' and just a quarter know what the term means. Although the Irish see themselves as a nation of givers, the positive embrace of philanthropy only extends to smaller donations made by the majority of the population. The contrast in Ireland, between a widespread readiness to give spontaneously when asked and the low levels of personal and corporate giving in a more proactive, purposeful, engaged way, presents a major opportunity to widen the extent of planned giving and to widen the amount given among the general public and corporate donors.

Philanthropy in the Republic of Ireland – An Overview

Philanthropy and fundraising capacity are both underdeveloped in Ireland. There are just 30 active grant-making foundations in the Republic compared to more than 8,000 in the UK. Donor advised funds, pioneered by community foundations, are also at an early stage of development. With 0.7 charitable foundations per 100,000 inhabitants, the number of Irish foundations lags far behind the European average of about 20.

Although the proportion of the population giving to charity is consistently very high in Ireland the actual levels of giving (with only 0.8% of income donated to charity) tend to be low. In the UK 1.2% of income is donated and in the United States the level is 2%. It is not only what people give that is of relevance but also how they give. Giving in Ireland has been characterised by spontaneous giving channels such as responding to emergency appeals, street collections and fundraising events. In Ireland, only 15% of people give in a planned way, compared with remain 36% in the UK. Another factor influencing philanthropy in Ireland is that little is known about potential donors or those with a propensity to give. High net worth individuals prefer to stay out of the limelight and remain anonymous as research North and South attests. In the **2010 Global Giving Report**¹⁴ it states that philanthropy among the wealthy tends to be carried out at a very local level in Ireland - what they term The Big Village Effect- in the report. This is attributed to the strong sense of community that still prevails in Ireland largely facilitated by the small size of the country and its population size.

“ There is now a need for us to craft a modern Irish model of philanthropy in line with our culture and values which will motivate people to give serious and sustained funding.”
Jackie Harris

The recent economic crisis had a severe impact on philanthropy in Ireland North and South, described by one CEO of an Irish philanthropy organisation as a time when 'giving fell off a cliff'. In addition, a serious vacuum is emerging on the Island of Ireland as two extremely significant philanthropic bodies will have exited by the end of 2016 - the **One Foundation** (which finished its work in 2014 and spent approximately €85 million on projects in Ireland) and **Atlantic Philanthropies** (which will exit the Republic of Ireland in 2016 having invested \$1.2 billion). Both were 'sunset' foundations focused on spending down within a defined period and both focused on the places and personal passions of their donors. A strong feature of **Atlantic Philanthropies** was the work done in co-operation with central and local government across communities. In Northern Ireland significant work was done with **Belfast City Council** on interface tension monitoring at community flashpoints as well as support for dementia strategy development as part of the **Age Friendly Initiative**. The question which now must be asked is what model of philanthropy will replace these very significant foundations?

¹³ Research into Awareness and Understanding of Philanthropy in Ireland, Behaviours and Attitudes, 2011

¹⁴ Global Giving: The Culture of Philanthropy, Barclays 2010

Report of the Forum of Philanthropy and Fundraising in The Republic of Ireland

The Forum on Philanthropy and Fundraising, which had been appointed by the Irish government to consider ways in which philanthropy and strategic charitable giving could be stimulated in the South, launched its report in 2012. This identified an opportunity to substantially increase the level of private sector investment in philanthropy by creating a favourable environment for individual and corporate philanthropy in Ireland and developing national fundraising capacity. This it was felt, would unlock significant funding and help to create new and innovative public private partnerships to address fundamental social and economic challenges, and in addition help to fund arts and cultural initiatives. The report stated that increased investment in the sector would generate increased employment in local communities, build social capital and support the movement for national reform and national renewal. While the status of this government appointed Forum is now uncertain work has continued on the four key recommendations from the report:

- The creation of a National Social Innovation Fund.
- The establishment of a National Giving Campaign.
- Improvement of the fiscal environment and infrastructure for giving.
- Development of the fund raising capacity among the not for profit community.

Much work has been carried out to deliver these objectives with the establishment of the **1% Difference Campaign** in 2013 which aims to both raise giving levels in Ireland and encourage Irish people and businesses to give in a more sustained manner. The campaign encourages everyone in Ireland to give 1% of their income or time to a charity of their choice or to a cause they support.

The **Social Innovation Fund Ireland (SIFI)** outlined in the forum report, was founded in 2013. It was catalysed by Government to create a fund of significant size and impact (€10 million initially) to foster the development of social innovations with a potential for transformative results to the critical social issues facing Ireland. To stimulate this, SIFI has put up a €5 million challenge fund, which can be drawn down as it is matched by philanthropic contributions. This fund will stimulate philanthropic giving by offering leverage through these matched state funds. It is investment-led philanthropy with a focus on defined social returns in areas such as unemployment, poverty and health. Three programmes are currently underway from **SIFI Thinktech, Animate and the Growth** programme.

New State Agency for Philanthropic Funding Announced July 2016

An indication of new government thinking on philanthropy in the Republic of Ireland can be seen from the recent government announcement in July 2016, by the Minister for Regional Development, Rural Affairs, Arts and the Gaeltacht, outlining plans for the formation of a new state agency in the Republic to raise philanthropic funding for cultural institutions which will benefit from a targeted approach to international Philanthropic support. The agency will be independent of government but funding for its establishment will be provided by the **Department for Regional Development, Rural Affairs, Arts and the Gaeltacht**.



A sea change in philanthropic giving resulting in sustained higher levels of giving by a greater number of individuals, families and foundations is being predicted for the next three decades worldwide



Key Players in Philanthropy in Ireland –

Community Foundation for Northern Ireland

The Community Foundation for Northern Ireland connects people who care with causes that matter. For over 35 years they have been a trusted, secure means through which donors choose how, when and where they give, by helping them to set up funds, supporting them to make grants and to see the impact of their donations on local communities in greatest need. Since 1979 the foundation has awarded over £100 million in grants to transformative projects and people.
<http://www.communityfoundationni.org/>

Philanthropy Ireland

Founded in 1998, Philanthropy Ireland is the association of independent philanthropic organisations and interests in Ireland. Their mission is to contribute to and inspire an effective and robust philanthropic sector, leading to an increase in private philanthropy that delivers benefits across society.

<http://www.philanthropyireland.ie/>

The Ireland Funds

With a mission to be the largest network of friends of Ireland dedicated to supporting programs of peace and reconciliation, arts and culture, education and community development throughout the island of Ireland. Founded in 1976, The Worldwide Ireland Funds currently operate in 12 countries and have raised over \$500 million for over 3,000 outstanding organisations. The Fund is one of the largest private funding sources for innovative work across the island of Ireland.
<https://www.theirelandfunds.org/>

Giving Northern Ireland

With a mission to champion Philanthropy/Giving in Northern Ireland, focusing on High Net Worth Individuals and Corporates and to build a strong independent voice for Giving by working in collaboration, co-operation and partnership with sister organisations
<http://www.givingnorthernireland.org/>

Community Foundation For Ireland

The Community Foundation for Ireland was established in 2000 with the intention of helping to grow a philanthropic ethos within Ireland and building a perpetual fund to support charitable causes and communities in Ireland and overseas. In 1998, a paper discussing the establishment of a community foundation was produced on behalf of Combat Poverty. This led the Government to issue a challenge to the private sector to establish a community foundation. Founded by businesses, NGOs and employer organisations, the Government issued a challenge grant of £1million which helped kick start The Foundation's endowed fund. This endowed fund has grown to exceed €40million today through the support of donors to The Community Foundation for Ireland. By the end of 2015, cumulative grant-making from the Foundation to charities in Ireland reached €25million.

<http://www.foundation.ie/>

Social Innovation Fund

Social Innovation Fund Ireland (SIFI) was founded in 2013. It was catalyzed by Government to create a fund of significant size and impact (€10 million initially) to foster the development of social innovations with a potential for transformative impact on critical social issues facing Ireland. To stimulate this, it has put up a €5 million challenge fund, which can be drawn down as it is matched by private contributions. Recognising the originality and drive of Ireland's diverse social enterprise and community / voluntary sectors SIFI will provide funds to scale social innovations that will improve life outcomes and have a widespread impact on critical social problems such as unemployment, poverty and health.

The not-for-profit sector has developed innovations which can improve life outcomes and cut costs. Just like businesses, these organisations need growth capital, but there is no significant not-for-profit capital market in Ireland. SIFI's role is to fill the gap by providing 'smart money' to enable the best social innovations to scale up in order to reach as many people as possible

<http://www.socialinnovation.ie/>

Philanthropy in Northern Ireland - An Overview

The Northern Ireland Council for Voluntary Action (NICVA) has been researching philanthropic patterns in Northern Ireland for some time and the latest 2015 Individual Giving Survey indicates that:

- Over half (57%) of the sample donated money over a defined four-week period.
- The majority of the sample (81%) donated in the 12 months prior to the Survey.
- Women and those aged 55-64 years were the groups most likely to donate. Tyrone/Fermanagh, Derry and Antrim were the most charitable regions, with 60% of respondents in these areas donating to charitable causes.
- The average amount donated was £17.44 per head of population. This figure is almost unchanged since the 2013 Individual Giving Survey.
- Health remains the most popular charitable cause amongst donors in Northern Ireland while religious/faith based causes are likely to receive the largest average donations from donors.
- Over the last 4 years, there has been a steady downward trend in the proportion of people that donate gifts in kind to charity.

In Northern Ireland successive government initiatives such as the **UK Giving Campaign** and the **Giving White Paper**¹⁵ have sought to encourage a culture of giving and philanthropy. While there have been no co-ordinated high level Northern Ireland Executive-led initiatives focused on supporting the growth of giving in Northern Ireland, a number of actions which support the thrust of the Giving White Paper have been implemented. However, it is generally accepted that there is scope to increase the number of donors and levels of donation from every sector across the Province.

Giving Northern Ireland is a significant player in the philanthropy landscape of Northern Ireland and was founded specifically to champion philanthropy in the Province focusing on high net worth individuals and corporate donations. With the support of **Atlantic Philanthropies** and the **Lloyds TSB Foundation for Northern Ireland**, **Giving Northern Ireland** engages directly with wealthy individuals and their financial advisors and uses research and targeted events to raise awareness of the potential for philanthropy across the region. **Giving Northern Ireland**¹⁶ commissioned research on the pattern of giving among high net worth individuals in Northern Ireland in 2013 to determine their motivations and preferred mechanisms for giving and to develop philanthropic activities in the region. Some of the findings mirror research from the South e.g. people give in clearly defined areas of personal interest, donors give not only money but time and expertise, the main areas donated to include children, education, health, medical research and the hospice movement. One in five of those surveyed had made provision for philanthropic giving in their will. The most frequently reported value of donation was £10,000 to £20,000 and two thirds of those making cash donations also gave their time and other commitments to local causes. The research also showed a lack of awareness of a culture of giving in Northern Ireland and a strong belief that philanthropy was a private matter and not to be publicised.

¹⁵ Giving White Paper www.gov.uk 2011

¹⁶ Giving By High Net Worth Individuals in Northern Ireland, Giving NI, 2013

Vision in Philanthropy (VIP) an informal partnership of organisations with an interest in the promotion of philanthropy also published a research paper on the Philanthropy Market in Northern Ireland¹⁷ in 2011. Recommendations from that report included the need to develop a strategy to enhance philanthropy, engage donors, develop a philanthropy infrastructure, enhance corporate philanthropy and develop peer support networks in Northern Ireland.

Atlantic Philanthropies have been working across Northern Ireland since 1991 and have invested more than \$554 million in a number of very significant initiatives to support the peace process, address the legacy of violent conflict, protect and expand human and civil rights, spur economic growth through higher education, create a stronger ageing sector and transform children's services through prevention and early intervention. As a sunset foundation it will exit Northern Ireland by the end of 2020 leaving a considerable vacuum behind. In the absence of a larger pool of trusts and foundations in the Province, some matched funding will be required along the lines of the **Community First** initiative which ran in the UK from 2011 to 2015. **Community First** allowed community foundations to offer donors a 50% match funding from government which was then used to strengthen communities across the UK. A new version of the scheme is currently under consideration.

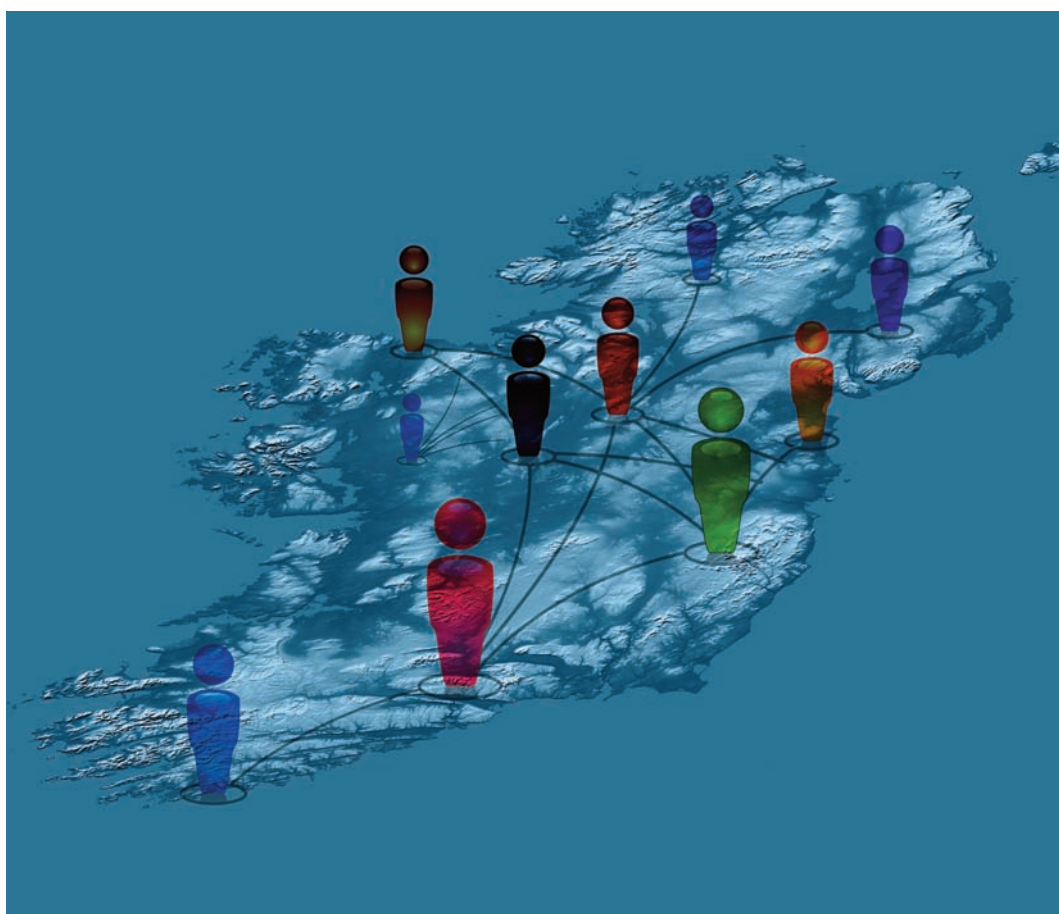
According to Kingsley Aikins of **Diaspora Matters**, networking the diasporas was a significant factor in bringing peace to Northern Ireland. New initiatives are now emerging in Northern Ireland to form international alliances with the Province's diaspora to bring funding and jobs into the Northern Irish economy. (It is estimated that there are ten million first and second generation Northern Irish people living away from the region in over 50 countries worldwide). Initiatives such as the **Belfast International Homecoming Conference** - begun in 2015- whose objective is to forge relationships with significant members of the Northern Irish diaspora to invest in the region and **Northern Irish Connections** which is a public private venture seeking to harness the economic potential of the Province's diaspora, point towards new trends in this area. Similarly, in 2015 the **Derry/Strabane Diaspora Project** was launched by the **Derry City and Strabane District Council** designed to bring engagement with the diaspora from that area.



¹⁷ The Philanthropy Market in Northern Ireland, VIP Research Report, 2011

Community Foundations for Ireland and Northern Ireland

Since the creation of the first community foundation in America in 1914, the concept of contributing resources to a permanent community improvement fund has been adopted across the globe with more than 1,800 place-based foundations now helping people to address local challenges and opportunities. Designed to pool donations into a co-ordinated investment and grant making facility they are dedicated primarily to the social improvement of a given place. The **Community Foundation for Ireland** and the **Community Foundation for Northern Ireland** play very significant roles in Irish philanthropy working as intermediaries between multiple donors and local communities. The **Community Foundation for Ireland** was set up in 2000 and has current assets of more than €40 million and has awarded grants of more than €25 million to local communities. The real strength of the Community Foundations is their skill in connecting donors to the most deserving and impactful causes. Emerging research concerning sense of place in philanthropy shows that it can be a very strong driver to the development of regional champions who wish to give back to their local community. Many examples exist of place based philanthropy such as the **Tony Ryan Fund for Tipperary**, **The County Monaghan Fund** and the **JP McManus Charitable Foundation** in Limerick. The **Community Foundation for Northern Ireland** was established in 1979 as the **Northern Ireland Voluntary Trust** before becoming the **Community Foundation For Northern Ireland** in 2002. Committed to addressing the challenges of peace building, social justice and effective community development it works in partnership with communities and local government departments and with donors local and international, helping connect them to people and projects who are transforming communities. Since 1979 the foundation has awarded more than £100 million in grants.



Local Authorities and Philanthropy in Ireland – New Collaborations

Snapshot - The Fermanagh Trust working with Fermanagh District Council

The Fermanagh Trust was established twenty-one years ago to support community and voluntary endeavour in County Fermanagh and its natural hinterland. The Trust's work has evolved over time, becoming one of the most successful county-wide community based philanthropic organisations in Ireland. The Fermanagh Trust has developed a strong working relationship with Fermanagh District Council and in most recent times Fermanagh and Omagh Council.

The two organisations have collaborated on a range of key objectives including research projects on the Wind Farm Protocol, Flags and Emblems and Shared Education in the County. The Local Authority has been very supportive of the Trust's community development/community relations work and also of the Trust's pioneering Community Energy and Shared Education strategies.

As part of the Local Authorities commitment to the work of the Trust the Council made surplus land available to the Trust in 2007 to facilitate the development of Fermanagh House, a successful social enterprise which is home to 9 charities as well as providing high quality meeting and conference space in the centre of Enniskillen. Most recently the Council leased additional land to support an extension to Fermanagh House. The new facility will open in October 2016.

Fermanagh and Omagh District Council recognise the value of having a successful local philanthropic organisation working at the heart of the community. In many instances the Trust is able to deliver innovative new projects including establishing new philanthropic funds which a statutory organisation working within its regulatory environment would find challenging if not impossible. Fermanagh has shown how partnership building can help develop local philanthropy for the benefit of local citizens.

Snapshot - The Cork Foundation and Cork City and County Councils

The Cork Foundation is a social enterprise fund fueled by donations from Cork people at home and abroad who wish to support social entrepreneurs and businesses requiring funding to deliver positive social change in local towns and villages. Established in 2013 and still in its infancy, Cork Foundation is positioning itself at the core of Cork, linking with voluntary organisations, community groups, start-ups and SMEs, local businesses, multinational companies and business leaders. Support can be financial or in the form of time, staff and skills. The Foundation uses 'sense of place' as a core driver in fund-raising and targets local Cork people, businesses and philanthropists and the Cork diaspora with a motto of 'Cork Giving Back to Cork'. The board is cross sectoral and multi-disciplined with representatives including the Chief Executive of Cork County Council, Chief Executive of Cork Chamber, academics and business leaders including John Mullins CEO of Amarengo.

The salary of the CEO of the Foundation is funded by two private donors. The current principal supporters of the foundation are Cork City and County Councils, Laya Healthcare, H and A Marketing and PR and Springboard PR and Marketing. In the past year it has also announced a number of corporate social responsibility relationships with the Construction Industry Federation, Fachtina O'Driscoll Solicitors, Amarengo Solar and Newsweaver. The Foundation is also working on a Pilot Diaspora Strategy with Cork County Council which will be launched in 2017 and is working strategically with both local authorities in the areas of diaspora, social enterprise and corporate social responsibility. Since its inception it has funded four local organisations namely the Cork Life Centre, Reimagine Cork, PMD Solutions and Northside Community Enterprises to the sum of €168,000.

An Opportunity is Emerging to Revise Philanthropy in Ireland

Could a golden age of philanthropy be emerging in Ireland? What is clear is that across the globe donors are experimenting with new funding strategies, the number of significantly wealthy individuals is growing exponentially, the diaspora are engaging more significantly than ever before with their countries of origin and people are questioning traditional foundation formats in favour of newer models. Is there an opportunity now for Irish Local Authorities to enter the philanthropy landscape and develop their own models and rules of engagement?

Smart Philanthropy and Smart Local Government: Driving Better Outcomes for Communities

Regardless of what you end up trying to do systematically, you've got to start with individuals who are open and receptive.

The laws of physics dictate that fusion generates huge amounts of energy. Irish Local Authorities, through the forging of new philanthropic partnerships, could drive innovative change and energy into the sectors. The time may also be right to begin the development of a philanthropy model which fits the Irish cultural experience. Emerging from the February conference "**Local Authorities Building Stronger Communities - the Role of Philanthropy and Alternative Funding Initiatives**" was a strong sense of the potential offered by partnerships between the sectors of Local Government and Philanthropy. Speakers highlighted the synergies and aspirations between contemporary philanthropic programmes and local government's core objectives of quality of life, economic development and social inclusion. Some Local Authorities in the Republic of Ireland and Northern Ireland are already working with philanthropic foundations and trusts such as **The Cork Foundation**, **The Fermanagh Trust** and **Atlantic Philanthropies**. Internationally a dialogue is opening between local governments and potential external donors. In Scotland, **Inspiring Scotland**, a venture philanthropy fund, is working closely with local authorities by supporting the performance management of **Early Years Public Social Partnerships**. In the US the Obama administration, with its emphasis on encouraging social entrepreneurship and bringing innovative community based programmes to scale, initiated the setting up of Offices of Strategic Partnerships at local, state and federal level to forge philanthropic-government partnerships through formalised structures. It appears that internationally more and more funders are finding such collaboration compelling. This coupled with the emergence of new models of philanthropic activity, more wealthy Irish entrepreneurs than ever before, Local Authorities connecting with the diaspora in a more strategic way and the recognition that local government skill sets could help deliver sustainable projects indicate that the same can happen here. If it can then where should Local Authorities start? Navigating this new landscape will be challenging as both philanthropy and Local Government have different institutional structures, cultures and norms that guide their behaviour. Cross sectoral partnerships carry risks. In the past a certain ambivalence existed between these potential partners and a journey of understanding must be embarked upon for projects to merge successfully. If matchmaking is to begin between the sectors it is vital to ensure clarity about the roles and responsibilities of the two sectors and the rules of engagement from the start.

Navigating the External Philanthropy Landscape - How to Start?

Networking is the Glue that Makes Everything Happen

According to philanthropy advisors networking is the glue that makes everything happen in philanthropy and should be front and centre of all activities. Local Authorities interested in beginning the philanthropic discussion and developing philanthropic partnerships will need to work externally with partners in order to begin to deliver on three critical elements:

- Demystify the sectors - this is critical so that both sides (Local Authorities and possible Philanthropic partners) understand each other and have reasonable expectations about what they are able to do.
- Convening and Facilitating - stimulate conversations among diverse stakeholders - government departments, other local authorities, foundations and possible donors to recognise the opportunities for partnership.
- Leveraging Resources - identify the resources both financial and human which can be matched and leveraged more easily between possible partners.

Navigating the Internal Philanthropy Landscape - Where to Start?

Local Authorities interested in examining the tangible benefits of philanthropic funding within their organisation will also need to realise that internally new skills sets will need to be crafted in order to develop a bespoke funding model. Several key elements for consideration include:

- Embed alternative funding strategies into all existing plans
- Start with a willingness to take a three to five-year view – the workload is significant and the process must be slow and thorough
- Realise there is much to learn – reach out to organisations such as Philanthropy Ireland to help navigate the sphere
- Identify ‘champions’ at Chief Executive level who can see the promise of philanthropic collaboration and identify and cultivate seminal staff within the organisation who are ‘context smart’
- Start with individuals who are open and receptive both internally and externally as possible partners – build personal relationships
- Consider setting up an office to catalyse and facilitate the process with a partnership manager role and status. This person will play a critical role, build bridges across cultures, be an optimist, and win stakeholder trust
- Understand that there should be a heavy emphasis on staff buy-in and capacity building
- Consider working at regional level with like-minded Local Authorities willing to pool expertise and develop innovative and replicable projects
- Begin to identify what funds raised will be used for – have a basket of projects ranging from modest to aspirational. Does the Authority want to add resources, build capacity or bring about innovative change?
- Be willing to leverage more than financial benefits from donors – knowledge and skills can be equally beneficial
- Crafting the ‘story’ of your project for potential funders is critical – context and spark are vital
- Crafting the ‘ask’ mechanism for each project is a skill which must be developed
- Identifying potential funding partners is a core skill and the power of ‘place’ is central to this
- Give early consideration to regulatory barriers that may arise, as well as building in accountability, governance and standards of effectiveness.

The Transformative Power of Giving in Ireland: Atlantic Philanthropies 1997-2016

The Atlantic Philanthropies foundation worked across a range of areas in Ireland including:

- Higher Education
- Ageing
- Children and Youth
- Reconciliation and Human Rights
- Health
- Non-profit Sector Philanthropy
- Pre-Collegiate Education and Teacher Development
- Community Development and Civic Engagement

Hallmarks of the work of **Atlantic Philanthropies** have included stimulating a knowledge economy by revitalising higher education, transforming the design and delivery of services for children and older adults, and protecting and expanding human and civil rights for those marginalised in Irish society. The key to Atlantic's impact was establishing strong working relationships with and among government and non-governmental organisation partners and a strong desire to embed the successful service models it helped fund across all areas of work. The Foundations emphasis was on long term planning, outcome evaluations, matched funding for grants and a strategic approach to their grant aid.

An example of an extremely successful joint funding venture began in 1997 when **Atlantic Philanthropies** developed a strategic co-investment initiative for Irish universities called the **Programme for Research in Third Level Institutions**. At the time the Irish Government was spending only 11% of the European average on basic research. Ireland's top researchers were leaving to work abroad. Atlantic began working with government to transform Ireland's capacity for world class research and by doing so, build a knowledge economy. Using grants to leverage government matched funding, Atlantic agreed to fund 50% of the first cycle of the **PRTL** and ultimately contributed to two more cycles for a total of \$262 million equivalent to 30% of the funding. The Irish government funded a total of \$1.3 billion to the initiative which concluded in 2015. This money delivered forty-five new centres of research which are now recognised as global centres of excellence.

Atlantic's grant making in Northern Ireland dates back to the early 1990s, and grew out of founder Chuck Feeney's personal efforts to help end political violence there. The foundation's initial grant making supported the peace process and strengthened higher education and in later years expanded to programmes focused on older adults, as well as children and youth. Atlantic's overall goal was to cement peace by improving the lives of those most disadvantaged and to help build a more equitable society that protects rights and strengthens democracy.

To help secure gains made during its years of grant making, Atlantic's final investments in Northern Ireland included a partnership with government (involving matched funding from Stormont departments) aimed at improving dementia care, fostering shared education and transforming children's services. Also, recognising the divides that still remained in Northern Ireland—despite the progress brought about by the peace settlement of 1998—Atlantic provided support to establish the **Human Rights Fund** and the **Social Change Initiative**.

Key achievements of Atlantic Philanthropies in the North include:

- 1: \$220 million leveraged, in addition to Atlantic and government investments of \$150 million, for research excellence and university infrastructure
- 2: Programmes of shared services developed at hostile “interface” communities, improving delivery of issues such as early years and parenting, cyber bullying, and youth engagement for many individuals and families.
- 3: Nearly double the number of integrated schools and pre-schools (49 to 90)
- 4: By 2013, 20% of all Northern Ireland schools (13,000 pupils) participated in regular weekly shared education from virtually a zero base in 2006
- 5: Shared education model replicated in deeply divided communities
- 6: Extensive new case law established clarifying and extending the rights of disadvantaged groups.
- 7: Enabled local communities to use international human rights standards to improve their local public services.
- 8: Nearly 500 cases of punishment beatings and shootings prevented in Belfast and Derry, and paramilitary beatings and shootings eradicated in seven of nine pilot areas
- 9: Creation of **Northern Ireland Pensioners Parliament** in 2011 has enabled more than 500 older people annually to represent their interests to government and policymakers
- 10: \$20 million from government to provide 80,000 older people with winter relief payments through the “**Can’t Heat or Eat**” campaign
- 11: Over 26,000 people collected social security benefits, totaling \$93 million, between 2007 and 2012 through the Access to Benefits project
- 12: Nearly a 19-times return on investment of benefits for older people, including housing, health and care, and community services
- 13: Grantees supported the development of the **2011 Dementia Strategy** highlighting the importance of making best-practice dementia care the norm from diagnosis to end of life, and sustaining a supportive environment
- 14: 33,000 children and their families receive high-quality, evidence-based early years care and education services
- 15: A sophisticated data tracking and measurement system to identify gaps in children’s services and improve interagency co-operation and co-ordination between government and service providers.

Key achievements of Atlantic Philanthropies in the South include:

- 1: **National Centre for Biomedical Engineering Science at National University of Ireland, Galway** transformed into a centre of excellence in biomedical engineering with approximately 100 Principal Investigators, 140 Post-doc and 180 PhD students
- 2: **Establishment of the National Centre for Sensor Research at Dublin City University**; it has generated research income of more than \$196 million and been referenced in more than 1,500 journal articles
- 3: A 14-fold increase in ageing-related researchers at the **Mercer’s Institute for Successful Ageing at St. James’s Hospital** and **Trinity College Dublin**, and over \$150 million for ageing research projects
- 4: The first and most comprehensive **Irish Longitudinal Study on Ageing (TILDA)** compiling 10+ years of data on a cohort of 8,500 Irish people ages 50+ has leveraged \$20.3 million from government and other donors and over \$5.4 million through national and international research grants
- 5: 32 acute hospitals implementing Hospice-Friendly Hospitals’ programme standards, 35 healthcare sites participating in piloting the new audit system, and nearly 3,000 staff trained to improve the provision of quality hospice/specialist palliative care
- 6: Voices of 15,000 people with dementia in nursing homes and acute hospitals amplified through peer advocacy
- 7: Ireland’s first National Dementia Strategy in 2014, transforming the way dementia is viewed and treated for 50,000 people – a number that is expected to triple by 2041
- 8: 26 Age Friendly Cities and Counties established through the **Ageing Well Network** of top executives from 75 organizations, providing age-friendly policies and services for ROI’s 500,000 older adults
- 9: 90,000 children and young people, 24,000 parents or caregivers, 4,000 professionals and 39 partner agencies benefited from 52 evidence-based programmes in prevention and early intervention
- 10: Nearly 200% increase (49% to 95%) in the number of four year olds attending pre-school, as a result of the new free universal pre-school for children offered by government since 2010
- 11: Passage of the Civil Partnership Act 2010 and the Marriage Equality Referendum in 2015
- 12: Closure of St. Patrick’s prison to 16 year olds and improved prisoner rights and prison policy such as establishment of the Office for Inspector of Prisons
- 13: 17,000 parents of Irish-born children permitted to legally remain in Ireland and significant reductions in wait time for citizenship from up to five years to six months

Navigating the Minefield - The Different Realities of Philanthropy and Local Government

Philanthropy	Local Government
We have a certain amount of flexibility about timing	We have to adhere to annual budget cycles
We see this work as a long term commitment	Local politics can change priorities
This initiative is a top priority	This initiative is one of hundreds of responsibilities
We can be selective about what we focus on	We do not have a lot of flexibility in setting priorities
We do not cover defunded services	An important programme has been cut - could philanthropy fund it?
Local Government is mysterious	Philanthropy is mysterious

(Adapted from Working with Government GrantCraft 2010)

The Philanthropy and Local Government sectors can work together very successfully as demonstrated by the work being done in Fermanagh and Cork and with the **Atlantic Philanthropies Foundation** across Northern Ireland and the Republic of Ireland. Building and sustaining good relationships will take planning, awareness, compromise and candour and a clear appreciation of the differences that exist between the two partners.

However, more important is what they could have in common, namely a motivation to solve issues by leveraging the distinctive capacities of philanthropy and the public sector.

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Notes



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