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What Makes for Charitable Giving and Philanthropy?

The Case of the Childless Elderly in Germany and
the U.S.

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Abstract

It has been suggested that the growing number of childless elderly may develop into charitable donors and pioneers in the field of a post-familial civic engagement. They may do so by giving to existing charities or by setting up their own philanthropic foundations as an alternative to consumption and bequests. The paper asks under which circumstances the childless elderly will engage in such forms of civic behaviour. This question is discussed in light of the available research on civic engagement and charitable giving in Germany and the US. It is shown that charitable giving of the childless elderly depends on the institutional regime under which they live, on their educational level, the extent to which they are integrated within personal and civic networks, on their religiosity and the state of the art of fundraising in the country in which they live.

Keywords

Keywords: Charitable Giving, Ageing, Childless Elderly, Social Capital, Philanthropy, International Comparison, Interactionism

*What Makes for Charitable Giving and Philanthropy?
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Similar to the American debate on social capital and civicness triggered by Robert Putnam (2000) and others, there is an ongoing debate in Germany and other European countries on voluntary action and civic engagement, both of which are seen as necessary contributions to democracy and to the transformation of the welfare state (Adloff 2005a: 108-30). For example, the German Bundestag launched a study commission on the future of civic activities which carried out its work from 2000 to 2002, producing several volumes of analysis and recommendations on how to foster civil society and voluntary action (e.g., Enquete 2002). Related to this debate is the revival of philanthropy, especially the revival of charitable foundations, both in public debate and in real numbers. Since the 1990s, philanthropic foundations in Germany have undergone a remarkable renaissance and a discourse on philanthropy has emerged. The number of new charitable foundations has risen, the legal framework has been substantially altered (in 2000 and 2002), and public attention has focused on foundations to an extent unimaginable even 20 years ago. The reasons for this are manifold: the decline of the welfare state, an increased trust in non-governmental organisations of public interest, and an accumulation of private wealth unprecedented in German history.

Indeed, it would appear that intergenerational transfers are a major source of household wealth. It is estimated that in Germany the intergenerational transfers from 2000 to 2010 will amount to 1.5 to 2 trillion euros (Braun 2003) and, retrospectively, inheritances of around 36 billion euros per year could be measured over recent years (Kohli et al. 2006). On the other hand, distribution of wealth is significantly unequal: during the last few years the top 5 per cent of wealthy households in Europe have received about two thirds of all inheritances (Jürges 2005). Thus, in absolute terms, class specific inequalities will further increase in the years to come (Szydlik 1999). However, it does not necessarily follow that unequal inheritances will increase the relative inequality of wealth distribution insofar as an inheritance has a relatively bigger impact on poorer households. A balancing out of unequal wealth distribution may thus occur on a relative level (see Kohli et al. 2005, 2006).

The growing number of childless elderly are viewed as an attractive source of bequests. Indeed, they can consume their wealth, give to next-of-kin, or donate a certain share to charitable causes. It has been suggested that childless donors may thus develop into pioneers in the field of a post-familial civic engagement. They may do so by giving to existing charities or by setting up their own philanthropic foundations as an alternative to consumption and bequests. Under which circumstances will the childless elderly engage in such forms of civic behaviour? This question will be discussed in light of the available research on civic engagement and charitable giving.

Seen from such a perspective it is not surprising that foundations in Germany – as age-old instruments for operating and/or funding institutions and projects for the public good – are currently seen in a positive light. But charitable giving and the establishment of charitable foundations have not become a subject of serious social scientific research and patterns of giving are to date poorly researched. However, voluntary action and the concept of social capital have become part of the German research agenda during the last ten years.

In the following sections three aspects of philanthropic action will be discussed: voluntary engagement, i.e. giving one's time and creativity, charitable giving, i.e. donating money or other resources to charitable organizations, and the establishment of philanthropic foundations, i.e. the creation of institutions of permanent giving. Comparisons will be drawn between charitable and philanthropic action in Germany and the United States and, finally, a theoretical explanation for charitable giving and philanthropy will be provided. Generally speaking, philanthropic action has a "gift character". I will follow Alain Caillé who defines the gift as "every allowance of goods or services made without a guarantee of return, with a view to creating, maintaining or regenerating the social bond" (Caillé 2000: 47).

In this article I attempt to collect and assess the scattered studies existent in the field, despite the fact that no study has directly addressed the question of charitable transfers of the childless elderly. It needs to be pointed out that while attempting to present a collection of empirical evidence and theoretical considerations no clear-cut results, however, are forthcoming.

1. Social Capital

The concept of social capital, employed by Robert Putnam (2000), refers to civil associations such as clubs and societies, informal networks, religious communities, self-

help groups, social movements, and so on. Social capital means social elements such as trust, norms, and social networks that can make society 'more successful' by allowing action to be coordinated.¹ Among the indicators that social research uses for the existence of social capital are data on the membership of associations and on voluntary civic engagement.

1.1 Social Capital in Germany

Although associations in Germany have changed, they are far from stagnating (Klein 1998: 678).² It is estimated that there are around 500,000 clubs and societies in Germany. Just under 60 per cent of the population of western Germany over the age of 15 belong to one or more associations (ibid.: 678). The number for eastern Germany in 1990 was 25 per cent, and since then the number has risen closer to that of western Germany.

The upper middle classes with higher educational qualifications are far more strongly represented in associations than people in lower income brackets and with a low level of education (Offe/ Fuchs 2001). The latter are especially underrepresented in the new civil associations such as social movements or self-help groups, and are thus less well equipped with social capital. In former times, these groups were often integrated into the associations of the classical socio-moral milieu, such as those of the labour movement or of the Catholic Church.

But the data also reveals an average increase in voluntary engagement over the past 30 years. The Volunteers Survey, for example, has recorded an increase in average activism over recent years (Rosenbladt 2000; Gensicke et al. 2005). The German Ministry for the Family, the Elderly, Women and Youth commissioned this Survey in the late 1990s. The first Volunteers Survey was conducted in 1999 and the results of the 2004 wave have recently been issued. The Volunteers Survey reports higher rates of volunteering in Germany than other studies do. Since the survey focuses extensively on all areas of voluntary action (community action is also measured but is not considered voluntary action) it might be more accurate than studies that only touch on these areas superficially. However it is also true that people who are voluntarily engaged might be over represented in this survey as they might be more motivated to answer questions relating to this field.

While in 1999 34 per cent of the population in Germany over the age of 14 were involved in volunteer work, the latest results for 2004 give a figure of 36 per cent. In 1999, 36 per cent of West Germans over the age of 14 were involved in voluntary work (in 2004: 37 per cent) while in the new federal states the figure was 28 per cent in 1999 and 31 per cent in 2004 (Gensicke 2000:176; Gensicke et al. 2005). The highest growth was recorded among people aged 60 and above. They were engaged in voluntary work with a share of 26 per cent in 1999, and in 2004 this reached a level of 30 per cent. If one only looks at the 60 to 69 age group, the rate has grown from 31 to 37 per cent (Gensicke et al. 2005: 16). This difference shows that the elderly at the age of 70 and

¹ Other definitions of social capital – such as those provided by James Coleman (1988) and Pierre Bourdieu (1983) – stress the 'private side' of social capital and its influence on patterns of social inequality. However, Putnam's definition is more established and suitable for the empirical and theoretical contexts discussed here.

² For the following see also Joas/Adloff 2006.

above volunteer less often. For instance the share of people volunteering at the age of 76 and above is 18 per cent for the year 2004. This decrease in volunteering rates by age group can often be explained by increasing health problems and the increased need for care and support.

The latest Volunteers Survey report also contains a regression analysis showing which independent variables are the strongest predictors for volunteering. In general, educational background is one of the strongest socio-structural variables explaining many of the variances. However, it is *the* most important variable for younger people between the ages of 14 and 24. Voluntary work among older people is no longer as heavily influenced by educational background. For the older generation over 60 the number of friends and acquaintances is the most important predictor for volunteering (Gensicke et al. 2005: 328). Religious commitment also has more of a place in explaining volunteering in this generation rather than among younger groups. Unfortunately, the Volunteers Survey does not distinguish between the elderly with children and the childless elderly; it only accounts for children if they are living in the household of the individual interviewed.

1.2 Social Capital in the United States

The state of civic engagement in the United States is much more difficult to describe than Putnam's diagnosis of the erosion of social capital suggests. The number of associations has risen during the last 25 years while membership numbers have fallen. Thus, the share of the American population that is active in any association has decreased (Wuthnow 2001: 666-72), and at the same time participation rates in elections have lowered significantly. However, civic engagement in general has remained quite stable. Around 45 to 50 per cent of the adult population has been involved in some form of voluntary action over the past 20 years. This is a much higher share than in the mid 1970s when less than 30 per cent of the adult population was actively involved. Rates obviously vary with educational background: people holding a high school degree volunteer with a share of 40 per cent whereas people with a college degree show volunteering rates of 60 to 65 per cent. The same pattern is true for income differentials. There are also differences between ethnic groups: whites show higher volunteering rates than African Americans or Hispanics. And, most importantly, people who regularly go to church show volunteering rates above 60 per cent whereas those who do not go to church volunteer with a share of 38 per cent (Hodgkinson et al. 2002: 391).

While a general decline of social capital is not shown, there is increasing evidence that there is a growing inequality in the distribution of social capital. Robert Wuthnow (1999) comes to the conclusion that social capital has not eroded evenly, but has become unequally distributed. Instead of erosion, there has been exclusion. "The fall in the membership of associations has always been higher among the socio-economically less privileged than among people who are already more privileged" (ibid.: 695). The encompassing study of Verba, Schlozman and Brady (1995) also points in this direction. More often than in the past members of the lower classes stand outside networks of civic recruitment. It is within such networks, either at the work place, in a union or in a religious congregation, that people are asked to participate and to volunteer. Verba and his co-authors stress that, with the unions in decline, churches represent the only places where underprivileged groups are recruited for civic action and where they can learn civic skills.

2. Charitable Giving in America and in Germany

I will now turn to charitable giving in both countries. This analysis will reveal both similarities and differences between the charitable traditions of these two nations and which can be explained by the different impact of the 'religious factor' in both countries (cf. Adloff 2007).

2.1 The USA

Charitable giving in the United States is deeply influenced by religious affiliation: those who go to church (at least once a month) give a share of their income that is three times higher than that given by people with weaker ties to their church (O'Herlihy et al. 2006: 16). Religious congregations receive the greatest share of charitable donations, which amount to around 40 per cent of the total sum. If only private households alone are included in the analysis and institutional donors are excluded, the share given to religious congregations increases to 53 per cent for the year 2002 (ibid.: 34). Furthermore, members of religious congregations give more to non-religious areas than people with no religious affiliation (Bielefeld et al. 2005: 133). The educational background of a person is one of the most important predictors of charitable giving. After checking for both income and wealth, it can be concluded that people with higher levels of educational achievement give more.

Another factor not to be overlooked is the role played by the expansion and professionalization of fundraising. Over the 20th century this profession has evolved and contributed to the broadening and democratisation of charitable giving. Hodgkinson (2002: 398) for example concludes: "The growth of the fundraising profession in recent decades helped to expand giving beyond the wealthy to the population more broadly." This is important, as the very fact of being asked for a contribution is one of the best predictors of charitable giving. However, being the member of an association and being active in it are by far the most important influences on giving behaviour. People actively involved in associations make donations twice as often as non-members and they give two to four times more (O'Herlihy et al. 2006: 17).

As far as the United States are concerned, it has been confirmed that different generations show different patterns of charitable giving (Steinberg/Wilhelm 2003: 3ff.). After controlling wealth and income, which are higher at a certain age, the effects of belonging to a particular generation can be still observed. The generation born before 1945 is more generous than that born in the years after. These data support Robert Putnam's (2000) thesis that there is a civic generation in the United States.³ Another interesting aspect is that, according to one study, married people give a higher share of their income than the unmarried even when checking income after tax. Furthermore, people with children give more than the childless (Jencks 1987: 326f.).

To conclude, charitable giving is first of all inherently connected to volunteering and networks of participation, and participation in religious congregations has been determined as the greatest influence on this type of behaviour (Schervish/Havens 1997: 247).

³ The possibility that this is an age effect, however, cannot be excluded in total. See Bielefeld et al. 2005.

2.2 Germany

During the last 15 years several studies on charitable giving conducted in Germany have reached very different conclusions. This data is only partially available since most of the research was carried out by private organisations active in the field of market research. These particular research institutions do not give out much information to the broader public.

The Federal Statistics of Income Taxes shows that 28 per cent of all taxpayers declared tax deductibility for charitable giving and the total amount adds up to 2.8 billion euros in donations. The actual total sum must obviously be higher (Buschle 2005). On average 0.27 to 0.28 per cent of income is donated; the givers are men with a share of 47 per cent and women with a share of 53 per cent. Similarly to donors in the United States, people with children give more often and give larger sums than the childless. The same is true for religious affiliation: people paying church taxes give more to other causes too. Thus, financial burdens do not lead automatically to a decreased amount of charitable giving. Both the participation rate and the quota given are higher in West Germany than in East Germany: East Germans give away 0.16 per cent of their income, West Germans 0.3 per cent. 26 per cent of the unmarried contributors range between the age of 30 and 40, and they donate only 18 per cent of the total sum. The older generation (above 65) make up 16 per cent of all donors, but their share of the total sum of contributions is 30 per cent. However, the patterns of giving within the older generation are also rather unequal. Very few of them give very much, which makes for a high average and a low mode.

The working group 'Spenden in Deutschland' (Giving in Germany) interviewed more than 5,200 people over the telephone.⁴ 49.5 per cent of those interviewed had contributed to charitable causes over the previous 12 months. One major finding was that both the educational as well as the religious background had a decisive influence on patterns of charitable giving. People between 45 and 59 years of age were the most active donors.

Thus, both in the United States and in Germany socio-demographic features such as income, education, gender, religious affiliation, and civic engagement seem to influence the question of whether or not an individual donates to charitable causes (cf. Adloff 2005b).

Priller and Sommerfeld (2005) analysed the aforementioned Volunteers Survey which also contains some variables on charitable giving. Correlations similar to those identified for the United States were found in the German case. A higher than expected participation rate of 63 per cent is reported here. The survey also contains questions relating to the amount of money donated. Three categories can be distinguished as follows: donations of up to 100 euros, donations between 101-500 euros, and those amounting to more than 500 euros. Since the last category is open, estimating the total sum donated would be rather speculative. But it can be said that the better educated, the religiously committed, women and the elderly donate money to charitable organisations more often than other groups.

The survey shows that religious affiliation is such a strong predictor of charitable giving that most of the differences between East and West German giving

⁴ See www.spenden-in-deutschland.de.

behaviour can be traced back to religious differences. People with religious affiliation participate in charitable giving with a share of 69 per cent, and people with strong ties to their church show rates of giving of 80 per cent and more (ibid.). A close relationship between volunteering and giving can also be observed in Germany. Even members of an association who do not volunteer give more often to charities than non-members. And the more intensively they volunteer, the more they give. Volunteering rates vary dramatically with religious affiliation: for example, East Germans with a strong church affiliation show volunteering rates which are twice as high as those of people with no religious affiliation (Braun/Klages 2001: 53).⁵ However, data on German volunteering and charitable giving is rather approximate and does not allow for exact differentiation between Protestants, Catholics and the religiously unaffiliated. There is a strong connection between educational background and giving behaviour; people with a high school degree are much more likely to give than people with a lower educational background. The survey also shows that the elderly give more often than younger people do. In addition to this, while with growing household incomes the total rate of people giving and the absolute amount of money given increases, the share of the household income given does not necessarily increase.

Priller and Sommerfeld (2005) also analysed the 2002/2003 European Social Survey with regard to patterns of charitable giving. The ESS does not include the question of how much someone gave to a charitable organisation but instead the information of whether an individual actually made a donation or not during the previous year. This means that participation rates for various countries can be extracted. According to the ESS data Germany shows a participation rate of charitable giving of 32 per cent. The Nordic welfare states show higher participation rates: Sweden, 44 per cent; Norway, 41 per cent; and Denmark, 34 per cent. The Netherlands rank highest with a rate of 45 per cent. It would seem that inclusive welfare states do not crowd out private charitable giving. In comparison, the more limited welfare states of the Mediterranean with their strong family regimes (cf. Kohli 1999, 2004) show a remarkably lower participation in charitable giving: Greece, 9 per cent; Italy, 11 per cent; and Spain, 15 per cent. Post-communist countries such as Poland (12 per cent) and Hungary (6 per cent) also show a low rate. The United Kingdom shows a rather high rate with 39 per cent of the adult population participating in charitable giving. Austria, with a participation rate of 37 per cent, is a very interesting case since it has no tax deductibility for charitable contributions. It seems that cultures of giving do not correspond to overall patterns of state activity or economic incentives. Nor is the pattern of giving with regard to gender homogeneous. In Ireland, Slovenia, Poland and Greece men give more often than women do whereas in the Scandinavian countries the share of donations given by women is significantly higher than that of men.

The ESS allows for discrimination between age groups participating in charitable giving with differing shares. Priller and Sommerfeld distinguished between people between the age of 14 to 34, 35 to 64, and 65 and older. It is striking that in all

⁵ Perhaps most of the differences between American and German levels of volunteering and giving have their roots in the different levels of religiosity. In 1991, 45 per cent of Americans went to church at least two to three times a month, 23 per cent even went once a week (Wuthnow 1999: 335). The fact that 50 per cent of Americans regularly volunteer can be explained by their high participation rates in religious services and religious associations. After controlling memberships in religious congregations the United States can no longer be ranked higher in terms of volunteering rates than most European countries (Curtis/Grabb/Baer 1992, 2001). Similar relations can be presumed to be valid with regard to charitable giving.

countries, except the Netherlands, people between the ages of 35 to 64 participate the most in charitable giving. Younger and older people give less often. This contradicts the findings of the Volunteers Survey in which the elderly show the highest rate of participation. Unfortunately, elderly people without children cannot be identified within the ESS database; it is only possible to identify whether or not children live in a certain household. Furthermore, Priller's and Sommerfeld's study remains at the descriptive level, and does not include multivariate controls.

3. Philanthropic Foundations

The following figures provide a comparison between philanthropy in the United States and in Germany. The New York Foundation Center lists more than 66,000 grant making foundations holding assets of 477 billion dollars with a spending of 30.3 billion dollars in 2003 (Foundation Center 2005). The five biggest foundations hold a share of 15 per cent of the total assets of the sector. However, most of the American foundations have small endowments.

In Germany around 15,000 to 18,000 philanthropic foundations exist, most of them rather small. During the 1980s the number of newly established foundations per year was around 150 while over the last 5 to 10 years about 500 to 800 new foundations have been set up each year.⁶ It is not easy to estimate the assets held by German foundations since they are not required to declare either assets or expenses. But it can be said that most of the foundations hold only small assets: in 2001, 50 per cent of the foundations had assets below 250,000 euros (Sprengel 2001). Clearly, individuals tend to set up small foundations while corporations and state agencies usually establish larger foundations. The German Parliament's Study Commission on Voluntary Engagement estimated that the financial contribution of the foundation sector to the total income of the German non-profit sector is only around 0.3 per cent.

While foundations often play a role in the process of building up a lasting and influential family dynasty among the wealthy (cf. Odendahl 1990), the act of setting up a foundation can also be seen as an alternative to having a family: both institutions deal directly with intergenerational inheritance and the future and both are meant to prolong one's life into the future of coming generations (see Hansert 2003).⁷ This is inherent in the social and also in the legal definition of a foundation. According to the German Civil Code of 1900, private autonomous foundations are "legal persons, characterised by assets, destined to serve a specific statutory purpose *in perpetuity* as laid down by the

⁶ Cf. 'German Association of Foundations': www.stiftungen.org.

⁷ In 2001 Psychonomics, an institute for market research, conducted a study in inheritance in Germany based on 500 interviews with inheritors and 500 interviews with testators (see Schulte 2003). Three groups of testators were identified: those having several children, those with one child, and the childless. People without children tended to view their inheritance less in terms of family property than people with children. Around half of the interviewed childless testators said that they did not see their wealth as something which was owned by a family. Furthermore, the question was asked whether testators were tending towards leaving their wealth to favoured individuals or whether instead they would use up their own wealth. Both questions were quite positively answered by the childless: 46 per cent wanted to give to favoured next-of-kin or others; 54 wanted to consume their wealth, thus following the life-cycle savings model (see Kohli 1999: 97, also Stutz/Bauer 2003). People with children approved of these two solutions only at the rate of about 20 per cent. Unfortunately, the question whether or not testators were planning to leave a bequest to charitable causes was not asked.

founder(s), and granted legal personality without members or owners by an act of government” (Strachwitz 2001: 136). For the childless, setting up a foundation can be a way of ensuring one’s name lives on, which would not be the case if one’s wealth was used up or bequests were made to next-of-kin. In the past the statutes of charitable foundations often mentioned that the founder had no children. Thus in theory at least, being childless favours the establishment of a foundation. Furthermore, it has been argued that foundations connect the individual to the broader public and the (imagined) common good (cf. Alexander 2001): a mere kinship link between a wealthy person and his or her social environment (as with inheritance) is broken up in favour of more deliberate and universal relations.

3.1 The German ‘StifterStudie’ – A Study of Founders

In the autumn of 2003 the Bertelsmann Foundation carried out a study of individual founders. To begin with, 22 in-depth interviews were conducted, then in early 2004 all founders who had set up an independent foundation after 1990 received a questionnaire (see Timmer 2005a, 2005b below for details). The basic data on these founders was supplied by the German association of foundations: of the 1,660 founders who received the questionnaire, 306 of them had died. More than 500 of the remaining founders sent the questionnaires back which makes up a rate of return of 46 per cent. Most of the founders set up his or her foundation in their own lifetime while in the past foundations were often established by testament. The largest group of founders was made up of people between the ages of 60 and 69. 70 per cent of the interviewed founders were men; most of the founders, (70 per cent), were married and most of them had children. However, there was a strong minority of childless founders and their share in the sample was 42 per cent which is high in comparison to the German average where 14 per cent of people above 50 years old have no children.

The German founders came from high educational backgrounds: 37 per cent had a diploma from a university or a technical college; 20 per cent held a doctorate. The largest occupational group consisted of entrepreneurs with a share of 44 per cent. More than half of these owned a company with more than 50 employees. 52 per cent of the German founders said that the assets of the foundation came from entrepreneurial activity, 28 per cent earned the money as employees and 25 per cent used a bequest or a gift as an endowment. 14 per cent of the founders described themselves as coming from an upper class background, 62 per cent from the bourgeoisie or middle classes, 13 per cent from the petit bourgeoisie or the lower middle classes, and 10 per cent from a worker’s household.

The private wealth of the founders was as follows: 20 per cent of the interviewed individuals had assets worth more than 4 million euros; 17 per cent between 2 and 4 million euros; 40 per cent between 250,000 and 2 million euros; more than 20 per cent up to the amount of 250,000 euros. The last figure shows that setting up a foundation is not necessarily a prerogative of super-wealthy citizens. Indeed, both community foundations and private independent foundations emerge as holding assets though at a comparatively low level.

Among the motives of the founders were, ‘serving the common good’ and ‘duty’ which ranked much higher than ‘gaining influence’ or ‘self-fulfilment’. However, personal interests are also highly important. Fulfilling a rewarding task, being content,

and feeling connected to the recipients of grants were the three most important expectations linked to the establishment of any foundation.

Most of the founders, 82 per cent, said that there was more than one reason and very specific circumstances which concretely motivated them to establish a foundation: the intervention of fate for example, such as an illness, motivated 24 per cent; an unexpected bequest, 26 per cent; the need to organise one's own inheritance, 27 per cent; or the inheritance of a family company, 7 per cent. Often, being without an heir prompted thinking about the establishment of a foundation. The childless reported more than others that the foundation is something they give to posterity. However, at least 43 per cent of all founders said that this was an important motivation for them. During their lifetime many founders rejected becoming publicly recognised figures and 45 per cent of them wanted to stay anonymous. What is interesting is that 65 per cent reported that they have no friends or acquaintances involved in voluntarism.

What is important to all founders is maintaining control over the resources they have: 53 per cent declared that they wanted to be the ones to decide what happens to their money and they do not want to give it away to anonymous charities or even the state via taxes. Ideas of sustainability and perpetuity were important to 71 per cent of all founders. The enduring fulfilment of a fixed purpose motivated them to choose the foundation as a legal entity. In contrast, donations are one-off transfers which are neither repeated nor lead to a lasting 'making of transcendent sense'.

Most of the foundations set up over the last few years tend to be rather small: 43 per cent of the interviewed individuals said that their foundation was endowed with less than 100,000 euros and only 7 per cent of the established foundations held more than 2.5 million euros. Consequently, 49 per cent of the founders hoped to receive donations for the projects they fund or additional contributions to the assets of the foundation. 44 per cent say that they plan to donate to their foundation after death through their wills. Many foundations hold assets up to the amount of 307,000 euros, the maximum sum allowed for tax deductibility which was increased by law in 2000. Thus, 41 per cent of the founders who set up a foundation in 2000 or after said that they chose the legal form of a foundation over other forms of charitable giving because it received tax privileges.

3.2 The BIS-Study: Privileged Milieux and the Common Good

In connection with the report on poverty and wealth published by the German government, the BIS (Berliner Institut für Sozialforschung) was asked to study privileged milieux as a basis for social hierarchies. Part of the project was to focus on the voluntary action and giving of wealthy citizens. The aim of the question posed was to establish under what circumstances private wealth is given for public purposes and to assess the value this may have for society (Schulze et al. 2004).

The project conducted in 2002 was the first qualitative study of German founders using open interview questions and a specific content analysis: in 2002, 14 founders, one patron and one chairman of a charitable association were interviewed. The 14 founders represented 19 charitable foundations. The foundations held assets between 50,000 and 25 million euros. Following an article by Steffen Sigmund (2000) the hypothesis that was followed was that founders as a social type are characterised by bourgeois entrepreneurship, individualism and a certain sense of mission. The motives of gratitude towards society, altruism, the wish to influence social processes, and prestige were all expected to be important. These hypotheses were quite strongly

supported. Furthermore, the researchers discovered that setting up a foundation was closely linked to both certain normative family traditions requiring a commitment to the common good and to circumstances in life, such as retirement, problems with finding a successor for the family company or a crisis often related to an illness. It emerged that some founders either did not want their offspring to inherit their entire estate or they believed their offspring did not need the inheritance.

Many of the interviewed said that giving back to society is the obligation of those who had the fortune to earn or inherit substantial wealth. The following words of a founder are illustrative and reminiscent of Andrew Carnegie's point of view: "It is not a sin to become rich; it is only a sin to die rich." This, of course, also legitimises wealth and social inequality. Gratitude and the desire to repay society seem to be some of the major motives according to this study. But founders are also aware of the fact that they receive something: e.g. recognition and prestige. In addition, self-fulfilment and a sense of purpose in life are also motivating factors.

Most of the founders interviewed had a large amount of social capital at their disposal which only increased by being used. It was needed in the daily work of the foundation, because most of the work was done voluntarily and founders relied heavily on social networks. Next to financial capital, social capital seems to be the most important resource for the work of a foundation without which grant making or operational processes were impossible.

When asked what circumstances favoured or hindered the development of foundations, founders replied that demographic changes as well as wealth may contribute to the spread of foundations. As an inhibiting factor a German 'culture of social envy' was mentioned. The wealthy often think that the majority of people envy them and they are therefore disinclined to demonstrate their wealth by setting up foundations. Wealthy peers also often disapprove of philanthropy. The interviewed founders wished for a culture that appreciates wealth on the one hand and has a commitment to the common good on the other, and the United States was often depicted as a model for such a culture.

Two typical attitudes towards the state can be distinguished: the first type of founder has a liberal self-consciousness and wants to reduce state activity to its core functions. When the state retreats from various fields of action this type of founder sees a rich source for his or her own activity. The other type of founder is more benign towards the traditions of the European welfare state and does not want the state to give up its whole array of activities.

This split within the German foundation community was also identified by a research project on the roles and visions of foundations in Europe launched by the LSE in 2001 (see Adloff et al. 2007). The section on Germany showed that the field of foundations can be divided, on the one hand, between a liberal branch which is distant from the state, and on the other, a corporatist sub-sector working in close contact with state agencies. In Germany a liberal sub-sector that puts emphasis on independence from the state has been evolving over the past 20 years. The share of foundations belonging to the social-corporatist sector – and which stem from the late 19th century tradition – has shrunk in Germany. Thus, it is argued that we are experiencing a new self-consciousness among founders and foundations as private and independent actors who are claiming the right to take part in the process of defining what the common good is.

4. How to Explain Charitable Giving?

In the following sections some of the possible explanations for charitable giving will be discussed. It will be suggested that it might be more fruitful to analyse the contexts of interaction and organisation than the personal profiles of individuals.

4.1 Altruism as a Feature of Personality or as an Organisational Category?

Over the last 20 to 30 years we have witnessed a rediscovery of the concept of altruism according to which the altruist is the counter-weight to the utilitarian egoist prevailing in economic theory. The work of the Oliners (1988) on people who rescued Jews from the Nazis and the work of Titmuss (1997 [1970]) on blood donation have been significantly influential in this respect. In short, the various psychological approaches in this field seem to have a limited range of available explanations; the features of an altruistic personality are simply not easy to identify. However, many studies show that interactions between the ego and the social environment are more important in assessing whether altruistic behaviour is a possibility (Monroe 1994: 888).

A different approach is presented by Kieran Healy (2000, 2004) in his studies of altruism in an international comparison. In his study of blood donation regimes in Europe he posed the question: what explains the fact that, for example, 14 per cent of adults in Luxembourg donated, whereas in France only 44 per cent of adults did so? Are the French more altruistic than the Luxembourgers? Healy shows that the organisation and institutionalisation of blood donation regimes is decisive. Different regimes have a different approach towards the population and different methods for finding and activating potential donors. Not only do the motives vary but also the institutional setting of collecting blood; he thus concludes: "Poor organisation – rather than selfish motivation – kept people from giving" (Healy 2000: 1642).

Another research project on organ donation in the United States also showed that altruism is highly institutionalised (Healy 2004). Different organisational capacities explain the differences between rates of organ procurement among the various states. The rates depend on the capacity of organisations to be present in hospitals and to get in direct contact with the relatives of the deceased. Healy concludes that altruism is not only a capacity of individuals but is also embedded in organised environments which provide structures for the opportunity to be altruistic and help to create and to shape this behaviour.

4.2 An Interactionist Micro-Model of Philanthropic Action

To be connected to associations and social networks shows a willingness to interact and creates the duty to do so at the same time. Paul Schervish, one of the leading scholars in the field of philanthropy, puts it like this: "our conclusion is that charitable giving derives from forging an associational and psychological connection between donors and recipients" (Schervish 2000: 10). The willingness to donate rests on involvement in networks of face-to-face relationships, which allow for identification with the interests, needs and the suffering of others.

It is of course easier to identify with causes that have direct implications for one's own life as is the case of giving to religious communities, schools, universities or cultural institutions (Schervish/Ostrander 1990: 78). Giving not only reinforces the social bond and therefore horizontal solidarity; giving also has the potential to create hierarchical relations by demonstrating one's own rank. Randall Collins (1991) for example sees in the charitable contributions of the rich a strategy for becoming part of high society and a way to legitimise their economic status. It is particularly the case for elites that donations and charitable foundations are vehicles for their self-definition and their expression of identity (Silber 1998: 143; cf. Adloff 2006; Ostrower 1995).

A theoretical model which deals with questions of philanthropic action should rely on an interactionist micro-model of action (cf. Sokolowski 1996; Fine/Harrington 2004). Individual philanthropic attitudes are, according to such a model, more the result of such actions than the reason for them. Social bonds and patterns of interaction are therefore better predictors of philanthropic activity than individual profiles or attitudes (Sokolowski 1996: 273). Motives for action are mostly generated in contexts of action and they are constantly re-framed through social actions (Joas 1992: 236f.). According to Sokolowski (1996: 274) the reason people voluntarily engage is "because someone showed them the way to a socially worthy deed". People participate in social networks either because they are motivated by people close to them or through organisational recruitment. In their study on political participation in the United States Verba, Schlozman and Brady (1995) point out that there are generally three possible reasons why people do not engage in voluntary action: either they lack the resources, or they definitely show no interest, or they stand outside recruitment networks, such as networks of friends, the work place or the church. In the United States, as has already been noted, churches are the most important places for learning civic skills and for civic action.

When people are integrated into social networks and are directly involved the related motives are reinforced: "this microstructural model of philanthropic behaviour can be illustrated as an expanded spiral that originates in social ties, and leads to participation in philanthropic activities which change the participant's attitudes which, in turn, motivates him or her for further participation" (Sokolowski 1996: 275). This is the reason why small groups (families, friends, and colleagues) build up the basis for voluntary action and charitable contributions. Small groups are the structural basis of civil society (Fine/Harrington 2004), and they offer opportunities for joint action, be it oriented towards solidarity or – and it is important to recognise this as well – to maintaining hierarchical boundaries. In group processes problems are defined and duties for action created, and under certain circumstances this may also be true for virtual communities such as television audiences (cf. Wenzel 2001).

Conclusion

To sum up, the indicators are quite clear: those who are well equipped with resources such as social capital and are highly integrated tend to give; those who have fewer resources show a decisively lower tendency to give. Social capital is a decisive factor influencing the level of volunteering and charitable giving. Low levels of social capital can be assumed for the lower income brackets and for people with a lower educational background. Social capital is one of the most important predictors for volunteering

among the elderly: the more friends and acquaintances an elderly person has the more likely it is that he or she will give to charitable causes. However, few elderly people make large donations to charities which distorts the patterns of charitable giving.

Charitable giving is highly influenced by the level of religious commitment. Religious people give more and volunteer more than the non-religious. In turn, the level of volunteering influences the amount and level of charitable giving.

The ESS data indicates that there is no crowding out between government activities and charitable giving. Modern gift economies differ from each other but do not follow a simple logic of zero sum games. There is no evidence that low government spending corresponds with high levels of charitable giving and vice versa.

Setting up philanthropic foundations is more or less still an elite phenomenon. Most founders have a bourgeois background, are wealthy and have a way of life which is characterised by entrepreneurship, individualism and philanthropic family traditions. Within this social milieu, establishing foundations is attractive for those who do not have children, both as a means of ensuring one's name lives on and as a way of organising an inheritance. Childless families do not always see their wealth as a family property and that may incline them towards the setting up of a foundation; specific circumstances such as illness contribute to this inclination.

Finally, altruistic attitudes and behaviour are fostered and nurtured by organisations. Asking for contributions, i.e. fundraising and creating a relationship of trust between a donor and a grant recipient or intermediary organisation creates motives for giving. Thus, the contexts for interaction are highly important and these may also contribute to an expansion and democratisation of charitable giving.

Philanthropy is not primarily made up of individuals taking altruistic decisions; it is set up through micro processes which have connections to broader societal contexts. Social relations are embedded in institutional and organisational environments that help create certain normative and cognitive interpretations. Groups and organisations create civic altruism and value commitments. Similar to patterns of intergenerational giving in different family regimes, variations in the field of charitable contributions are mostly due to differences in the organisation of such behaviour; institutional regimes, for example, create different normative obligations (cf. Kohli 2004: 274).

Thus, charitable giving of the childless elderly depends on the institutional regime under which they live, on their educational level, the extent to which they are integrated within personal and civic networks, their religiosity and on the state of the art of fundraising in the country in which they live.

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