

## **The Management and Organisation of Philanthropy: New Directions and Contested Undercurrents**

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The steadily maturing academic scholarship on philanthropy and philanthropic institutions (cf. Jung, Phillips and Harrow, 2016; Wiepking and Handy, 2015; Ma and Konrath, 2018) is the focus of this Special Issue. As philanthropic endeavours take on global problems or fill social spaces of public provision, many vacated or unattended by governments, philanthropy's organisational and managerial dimensions become increasingly important (Anheier and Daly, 2006; Hammack and Heydemann, 2009; Sulek, 2010). Normative, prescriptive and instrumental definitions of philanthropy thread throughout the literature. They project perspectives that range from hypercritical rejection (e.g. McGoey and Thiel, 2018; Eikenberry and Mirabella 2018; Thompson, 2018) to world-saving welcome (Bornstein, 2007; Brown and Green, 2010; Perry and Mazany, 2010; Saura, 2017). Contestation of philanthropy's meanings and rationales (Daly, 2012; Moran and Branigan, 2016) also illustrate the variety of historical and cultural trends in societies which differing philanthropic choices and actions exemplify. Scholars are thereby challenged to explore whether or how the balance of advantage and disadvantage presented by philanthropic action can be theorised and empirically assessed.

Meanwhile growing attention to managerial and organisational considerations in philanthropy is found in other disciplinary discourses, including anthropology, biology, demography, economics, geography, history, political and policy sciences, and sociology (for example, Farley, Goss and Smith, 2017; Pill, 2017; Pollard, Datta, James and Akli, 2016; Scocpol, 2016; Scaife and Williamson, 2014). We consider that the applied disciplinary perspective of Management and Organisation studies provides valuable insights into philanthropy's engagement in societies, its levels and forms of delivery, its ambitions and its results. This is especially so if philanthropy from organisational perspectives is considered a coalition concept, comprising the components of gift, promise and task, all of which have organisational and managerial questions at their heart. For example, the tasks of philanthropy (seemingly less heroic than promising or giving), requires scrutiny through managerial and organisational study lenses. Those tasks include philanthropy's collaboration choices, organisation life planning, mergers, leadership and people management models, asset planning from investment to disbursement, and risk and reputation management (Maclean, Harvey, Gordon and Shaw, 2015). Although inter-disciplinarity seems valued as a philanthropy studies characteristic (Katz, 1999; Nickel, 2018) it seems sparse in execution; while Drezner (2017) sees it as both a benefit and a hindrance to philanthropy scholars and practitioners.

This Special Issue aims to:

- provide an informed understanding of the importance of the study of management and organisation in philanthropic institutions;
- articulate and critique the directions in which management and organisational research perspectives on philanthropy in its institutional settings are heading and
- explore the implications of organisation and management literatures for philanthropy's developing and future roles and conceptualisations in societies and communities, whether as resources benefactor, bridge or barrier.

'Philanthropic institutions' are those whose primary purpose is as a *provider* of resources – 'treasure, time, talent' - for public benefit, acting privately for public purposes. These are predominantly understood by scholars as trusts and foundations (Scherer, 2017). For this Special Issue they also include those entrepreneurially-driven and functioning, those operating as Donor-Advised Funds within private investment firms (Colinvaux, 2017), and smaller entities within commercial firms. Also more specialised structural forms, such as the *waqf*, longstanding and new forms of endowed institutions in Muslim societies (Moumtaz, 2018), and the Australian privately operating Trustee Companies (Cham, 2016). By considering philanthropic institutions as resource providers and enablers, we are excluding a primary focus on resource-seeking non-profit organisations.

A series of broad themes and literature directions enable a range of understandings on which developments in philanthropic institutions' management and organisation are embedded and mainstream and which developments remain as undercurrents, whether experimental, fringe, gaining credence or facing rejection.

These themes include power relations among stakeholders, from prominent global donors (Partzsch, 2017) to advocacy, and workforce challenges when seeking consensus building among unequal actors (Maclean and Harvey, 2016; Kohl-Arenas, 2017). Relative power imbalances affect institutions' strategizing (Patrizi and Thompson, 2010); and assessment of successes or failures (see for example Anheier and Leat's 2019 identification of foundations' 'benign fallibility'). Illegitimate actors and organisations also seek legitimacy from philanthropic institutional involvement (Cederström and Fleming, 2016 ; Kuldova, 2017). The literature's emphasis on elite philanthropists and executives (Saunders-Hastings, 2017; Mandler and Cesarini, 2017), and their institutional ambitions (Glass and Pole, 2017) raises questions concerning the contributions of middle managers, staff and volunteers, their characteristics such as race and gender (Liddell, 2007) and relative power. Meanwhile, assumptions and practices regarding 'efficient donors and meritorious receivers' (Roohi, 2018) make and re-make the philanthropic task, more as professionalising, impactful and streamlined rather than as a messy, risky set of activities. Paradoxically, given philanthropy's expression as 'love of mankind' (Sulek, 2010), it is unclear whether philanthropic institutions themselves exemplify love in their intra- and inter-organisational actions and processes, for example, sustaining trustworthy relationships and offering compassionate leadership (Tasselli, 2018).

Notwithstanding argument that foundations are themselves institutional entrepreneurs (Quinn, Tompkins-Stange and Meyerson, 2014), separate categorisation of entrepreneurial philanthropy denotes or suggests institutional progression. Here, wealthy entrepreneurs devise and implement innovative solutions to pressing needs, rather than respond passively to causes which others designate (Gordon, Harvey, Shaw and Maclean, 2016). Philanthropy's attraction to 'grand challenges', with its accompanying inter-organisational paradoxes (Jarzabkowski, Bednarek, and Cacciatori, 2018), is especially marked here; where, in the complex mix of business and philanthropic endeavour, the world-making nature of such entrepreneurs emerges (Harvey et al, 2011).

Further themes for consideration include philanthropic institutions' identity development, and the progression of institutional hybridity, visible in the emergence of social enterprises (cf. Mair, Mayer and Lutz, 2015). Typological studies inter-relate with institutions' chosen identities; also suggesting structures more or less helpful for completing particular philanthropic tasks (Jung, Harrow and Leat, 2018). Philanthropic institutions may be less subject to the identity pressures placed generally on non-profits (Johansen and Neilsen, 2016), while allying to other civil society areas, and being variously embedded in different governmental regimes (Wijkström and Einarsson, 2018). In state and government organisations especially, changing relations with philanthropic institutions heighten demands for cross-sectoral collaboration (Healy and Donnelly-Cox, 2016); allied to calls for enhancing philanthropic institutions' adaptive capacities in rapidly changing circumstances, such as conflict and post-conflict contexts (Cannon and Donnelly-Cox, 2015). Finally, academic interaction with philanthropic (especially institutional) practice, through research, is growing. Understood as engaged scholarship, collaborative academic-practice inquiry, to generate useful organisational knowledge (Barge and Shockley-Zalabak 2008), its contributions to managerial and organisational development and change remain elusive.

Questions for exploration in the management and organisation literatures that could be addressed by contributors to this Special Issue include but are not limited to

- What is the importance of leadership, people management and /or organisational design in achieving philanthropic institutions' purposes?
- Why, to what extent and how has strategic management thinking and practice affected philanthropic institutions, with special regard to their effectiveness, knowledge management, impact and legitimacy?
- Where, why and how has philanthropic institutions' growth in professionalisation occurred; and with what effects on theory and on institutions' accomplishments?
- To what extent is organisational hybridity invigorating to philanthropic institutions?
- Why, how and with what effects on collaboration theory and practice is inter-organisational collaboration a growing feature among philanthropic institutions?
- How is organisational success and failure in philanthropic institutions theorised?
- How, why and to what degree has engaged scholarship and research enhanced management and organisation understanding and change in philanthropic institutions?

## Paper Submission Information

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**Dr John Healy** is Deputy Executive Director of Genio in Ireland. He oversees programmes to improve social services in disability, mental health, dementia and homelessness and leads the organisation's work in Ireland in the Service Reform Fund, a €45m public/private collaboration. He is an adjunct assistant professor at the School of Business at Trinity College Dublin, where he researches social innovation, philanthropy and the implementation of reforms in complex social service systems. He has professional experience of advising large, philanthropic grant-making programmes promoting social innovation, human rights and public health across the US, Europe, Asia and Africa.

**Dr Filip Wijkström** is Director of the Stockholm Centre for Civil Society Studies, (SCCSS), and Associate Professor in Business Administration, Department for Management and Organization, Stockholm School of Economics, SSE. (*Handelshögskolan i Stockholm*). Filip's primary research interests are the role of civil society, nonprofits, philanthropy and social movements in society, and the governance and different modes or organisations in this sphere. Contributing prominently to doctoral programmes, he currently holds two national grants for research on the nonprofit governance of welfare and the study of transnational governance of the global university field. A Co-ordinating Member of the Standing Working Group of EGOS, '*Organizing in and through Civil Society*', Filip is a co-editor of the *Nomos* book series on international civil society, on the International Advisory Board for *Voluntary Sector Review*, and on the Senior Editorial Board for *Nonprofit Policy Forum*.

**Dr Marian Iszatt-White.** After a successful career in financial risk management, latterly as Group Treasurer of Top 100 plc Enterprise Oil, Marian undertook her PhD research at Lancaster University's Centre for Excellence in Leadership, conducting an ethnomethodologically-informed ethnography of leadership in the learning and skills sector. She is now a Lecturer in the Department of Entrepreneurship and Strategy, and Director of the School Doctoral Programmes. Her primary research interests relate to the practice turn within leadership, and particularly the discourses and identity work through which leaders 'square the circle' between the demand to

perform emotional labour and the need to appear (and feel) authentic. Marian has previously guest edited a number of SIs on leadership topics and regularly reviews for key journals in the field, including *Leadership*, *Management Learning* and *IJMR*.

**Professor Charles Harvey.** Charles Harvey is Professor of Business History and Management at Newcastle University Business School and Director of the Centre for Research on Entrepreneurship, Wealth and Philanthropy (REWP). He holds a PhD in International Business from the University of Bristol. He is author of numerous books and articles in the fields of strategy, leadership and management. His research focuses upon the historical processes that inform contemporary business practice, entrepreneurial philanthropy, and the exercise of power by elite groups in society. He has drawn on and developed the theoretical position of Pierre Bourdieu in his research on business elites, networks and philanthropy conducted with Mairi Maclean and others. Recent publications are in the *Academy of Management Review*, *Business History Review*, *Human Relations*, *Organization Studies*, *Organizational Research Methods*, and *Theory, Culture and Society*.

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