Philanthropic Foundation Networks in the Arts

Is institutional philanthropy curating the arts in Australia?

Sharon Nathani (Swinburne University of Technology)

1. **Abstract**

This research examines institutional philanthropy supporting the arts in Australia. Support is growing (McLeod 2018), and philanthropy is 14 per cent of arts organisations’ budgets (Perpetual Trustees 2019), forming an important revenue source. The research explores how individual decisions, goals and strategies affect funding decisions asking if institutional philanthropy curates the arts, and whether networks facilitate this. Critical and pluralistic perspectives on philanthropy such as hyperagency (Schervish 2003), the role of elites (Ostrander 2007) and philanthrocapitalism (Bishop & Green 2006) are considered as ways of exerting influence on the arts. A critical realism lens was applied to 32 semi-structured interviews. Five hundred and forty foundations and 430 arts organisations receiving funds were identified through archival documentation from arts organisations and philanthropic funders further identifying networks and common characteristics. The research reveals common characteristics, networks, values and approaches to strategy relating to goal setting and objectives and appreciating the arts as vital to society. Motivations for giving are deeper than peer identification and status signalling (Ostrander 2007: Ostrower 1995: Odendahl) and more considered than the critiques of philanthrocapitalism (Bishop & Green 2006) and high net worth philanthropy assume (Giridharadas 2019); McGoey (2016); Reich (2018)). Adding to our understanding of hyperagency in institutional philanthropic funding for the arts, this research reveals nuanced relationships between philanthropy and recipients. It demonstrates a strategic philanthropy approach (Brest) supporting causes which individual actors are passionate about. It is the first Australian study of its kind on institutional philanthropic funders and the arts.

1. **Main text**
2. **Introduction**

This research considers institutional philanthropic funders supporting arts and culture in Australia. The key research question is: *Is institutional philanthropy curating the arts?* which necessitates an exploration of the arts, philanthropy, and institutional philanthropy, and an understanding of curation and influence. While curation often refers to the choosing or selecting, organising, and maintaining a selection of artworks, in the context of this research the term is taken to mean having the power to choose what arts and culture to fund or what not to fund. Funding from institutional philanthropic funders can make the difference between going ahead or shelving theatre, music, opera, and dance performances, literary magazines, and poetry publications, festivals, or programs at collecting institutions such as art galleries and museums, and libraries and heritage organisations. Therefore, philanthropy acts as a proxy in creating and supporting arts and culture in Australia.

Institutional philanthropic funders are trusts and foundations set up by individual donors as structured giving vehicles with trustees, boards, missions, purpose, and objectives. They may be set up in perpetuity and can be sub-funds of special giving vehicles known as Public Ancillary Funds (PuAFs), Private Ancillary Funds (PAFs) or testamentary trusts which are discussed in more detail below.

The research examines institutional philanthropic funders in Australia through their relationship to beneficiaries and grant recipients in the arts and cultural sector seeking to understand the relationships *between* institutional philanthropic arts funders and whether there are linkages and interconnectedness. It examines whether institutional philanthropic funders share funding ideas, and if they are inspired by peers and colleagues about potential grant recipients. It interrogates the nature of these relationships and networks between founders, trustees and staff of institutional philanthropic funds. In addition, the research reflects on arts organisation donor circles and stewardship events as means of facilitating connections and growing relationships. The research seeks to understand the nuances of the influence of institutional philanthropy on the arts and asks whether philanthropy is stepping into the role of ‘patron’ previously held by the state (Chartrand & McCaughey 1989; Throsby 2001). It considers whether patronage determines who and what is funded or who and what is not funded and whether institutional philanthropic funders curate the arts in the context of hyperagency (Schervish 2003).

On the recipient side of the equation, the focus of this study is arts organisations eligible to receive philanthropic grants in Australia with tax charitable status and Deductible Gift Recipients approved by the Australian Tax Office (ATO) or Register of Cultural Organisations (ROCO). The study is limited to those arts organisations because of legal structural constraints on institutional philanthropic funders as to what types of organisations they can support, based on charitable and DGR status, thereby excluding for-profit arts entities such as publishing houses, fashion design businesses, individual artists, or filmmakers and other organisations operating under the umbrella of the “creative industries”.

1. **Australian context**

In 2019-2020 cultural and creative activity contributed $122 billion to the Australian economy (an increase of 27.1 percent over the last ten years) (Bureau of Communications, Arts and Regional Research (BCARR) 2022). Prior to COVID-19 the arts and cultural sectors employed eight percent of the workforce (Australia Council 2015) and generated significant value through volunteer services which in 2019-2020 was valued at $1.1billion (BCARR 2022). Despite this significant contribution to the economy, the arts do not have their own federal government ministry. Federal Government support for significant arts organisations is relatively stable (Office for the Arts 2021; Travkina & Sacco 2020). But small to medium arts companies face challenges (Caust 2019), having lost capacity due to reduced Australia Council (Australia’s central arts funding authority) funding (Browne 2020), and COVID-19. Because of significant lockdowns during COVID-19, by March 2020 less than half of arts businesses were operating (Browne 2020) and a quarter of arts workers had stopped working by May 2020 (Daley 2021).

Australia is a relatively wealthy country. The Australian Bureau of Statistics (ABS) recorded the average net worth for all Australian households in 2019–20 as $1.04 million (AUD) (ABS 2022). The OECD Better Life Index (2023) ranks Australian household income and net wealth above the OECD averages for these indicators and the Credit Suisse Global Wealth Report 2022 ranked Australia fourth in terms of mean wealth per adult, and first in relation to median wealth per adult. Despite this statistical abundance, there is a cultural cringe regarding overt wealth in Australia. “The tall poppy syndrome” (Mancl & Pennington 2011; Peeters 2004) alludes to where people do not wish to be seen as ostentatious or standing out from the crowd, for fear of negative scrutiny or being cut down to size. This can lead to potential philanthropists deciding “not to stick their head above the philanthropic parapet” (Breeze 2021). Philanthropy is seen as the province of the “elite” or the super wealthy, even though Australia has a growing number of community foundations and collective giving circles which include people with the capacity to give at any level (Scaife & Williamson et al. 2012)

Philanthropy in Australia is regulated by laws originally based on the Charitable Uses Act 1601 from the United Kingdom. The first Australian Charities Act was enacted by the Australian Federal Parliament in 2012 to establish the Charities and Not-for-profits Commission (ACNC) as the regulatory body for charities. This was followed by the Charities Act 2013 defining charity and charitable purposes. There is no legal definition of a foundation in Australia (Justice Connect 2018; McGregor-Lowndes & Williamson 2018) and there are 65,000 charities in Australia, and confusingly, institutional philanthropic funders are included amongst them. Institutional philanthropic funders in Australia control large assets, with the philanthropic contribution to the arts being small relative to government funding. However, philanthropy is growing steadily and is imbued with significance because it is tolerant of risk (Anderson 2013; Moran 2018) and is also discretionary. Available information on institutional philanthropic funding for the arts and culture in Australia is based on tax office data (McGregor-Lowndes, Newton & Marsden 2006; McLeod 2018).

There is a lack of conceptual typologies for institutional philanthropic funders in the academic literature specific to Australia (McGregor-Lowndes & Williamson 2018). However institutional philanthropic funders can be categorised into four main types: Private Ancillary Funds (PAFs), Public Ancillary Funds (PuAFs), Testamentary Trusts, and Other charitable trusts.

Private Ancillary Funds are charitable funds with an endowed corpus usually of at least $500,000 (McLeod 2018), and usually in perpetuity established by high-net-worth individuals and families. PAFs are subject to audit, compliance, granting and reporting requirements. PAFs demonstrate a higher rate of support for the arts and culture than other charitable trust types (McLeod 2014). As of 2020, PAFs have approximately $7.6AUD billion in funds under management (McGregor-Lowndes, Balczun & Williamson 2021). PAFs must distribute 5% of their 30 June value to beneficiaries meeting certain tax requirements (Ward 2016; Scaife et al. 2016). This type of structure was first introduced in 2001 (Scaife et al. 2016). In June 2001 there were 21 PAFs while in 2020 there were just over 1800. Because of this growth, PAFs are a significant part of the Australia philanthropic sector. In 2019-2020 PAFs distributed approximately $60 million dollars to cultural organisations (McGregor-Lowndes, Balczun & Williamson 2022). The total distributed by PAFs to cultural organisations up to 2020 is more than $383 million.

Public Ancillary Funds (PuAFs) differ from PAFs in that any member of the public can donate to them (Scaife et al. 2016). Donors to PuAFs can contribute to the general fund or set up their own sub-fund stating their preference or recommendation as to who receives their grants. This is similar to the “donor-advised” funds in the US (McLeod 2018). In 2020, there were 1373 PuAFs in Australia, holding just under $4 billion in endowed funds (McGregor-Lowndes, Balczun & Williamson 2022). PuAFs have a lower distribution rate than PAFs at 4%, and arts and culture is a much lower priority area (McLeod 2018). PuAFs gave just under $13 million to cultural organisations in 2019-2020 compared to $60 million from PAFs (McGregor-Lowndes, Balczun & Williamson 2022).

Testamentary trusts created through Wills and bequests may also be set up as a PAF (McGregor-Lowndes & Williamson 2018). There is a lack of empirical data on “other charitable trusts” in Australia which are charitable vehicles set up through a deed document. There is little information on their number, size, corpus, who they grant to, what they are interested in, and how they operate (McGregor-Lowndes & Williamson 2018).

1. **Philanthropy literature in relation to funding the arts and curation**

Philanthropy, “the private giving of time or valuables (money, security, property) for public purposes” (Salamon, 1992, p. 10), can benefit society by addressing the root causes of societal problems (Anheier & Leat 2013) or filling gaps left by government or the market (Glass & Pole 2017; Moran & Stevenson 2013; Schmid & Bar Nissim 2016; Youde 2018). Where market failure has led to an erosion of richness in the arts in Australia (Pennington & Eltham 2021), this has been mitigated to by philanthropic support for the arts, particularly amongst institutional philanthropic funders (McLeod 2018). The Support Report tracking changes in giving trends in Australia notes that for the arts “the fall in Government funding (was) matched exactly by the rise in donations” (McLeod 2018). Philanthropy fills gaps the welfare state had previously covered (Breeze 2021; McLeod 2018) but is now criticised for doing so. Critics of philanthropy insist that institutional philanthropic funders represent unaccountable concentrations of wealth and power (McGoey 2016; Reich 2018). Yet, philanthropy plays an important role in supporting innovation in the arts. It provides risk capital for untested programs (Anderson 2013; Brest 2012; Ferris 2016; Moran & Stone 2016; Moran 2018) allowing space for thinking and incubation time to develop ideas, innovation, experimentation, and significant works of art, music, and theatre.

The autonomy of institutional philanthropic funders provides opportunities for independent and pluralistic choices in giving (Brody & Tyler 2010), endowing them with power through their capacity to choose what to support. Philanthropy can be thoughtful and strategic when institutional philanthropic funders set clear goals, use empirical evidence to support their giving, consider the costs, risks, and benefits to judge the effectiveness of their giving (Brest 2005). The pluralism of philanthropy allows for the amplification of voices with diverse values and passions (Ferris 2016). Pluralism in philanthropy allows institutional philanthropic funders to approach funding recipients from different angles or perspectives. Working as agents of change, philanthropic foundations can counter deep seated mistrust of their power despite perceived connections to business and private sector wealth through “ostensibly social goals” (Moran & Stevenson 2013, p.124).

In the arts, these goals include diversity of voices, support for regional arts practice, promotion of cultural education, participation and support for indigenous arts and artists. Institutional philanthropic funders can develop and grow relationships, negotiate with multiple parties, mobilise resources, and advocate to government (Moran & Stevenson 2013). A pluralistic approach can support and refute the counter arguments suggesting philanthropy is not good for democracy (Reich 2018; Reich 2016).

As an investment for good (Bishop & Green 2008; Frumkin 2006), philanthropy benefits society by encouraging a vibrant civil society (Anderson 2013) and making a difference (Katz 2005; Shaw & Gordon et al. 2013). Philanthropy also provides the space and opportunity for grant recipients to leverage funding for further support through matched grants (Daley 2021).

On the other hand, while people may consider philanthropy as a benevolent manifestation of wealth, and the term derives from the Greek “love of humanity,” modern philanthropy is not without critics (Arnove 1982; McGoey 2012; Reich 2016; Roelofs 2015). Since the growth of institutional philanthropy in the United States of America doubts have been raised as to motivations, legality, and benefits (Giridharadas 2019). Criticism of philanthropy has manifested in both popular recent scholarship (Callahan 2017; Giridharadas 2019) and academic work (McGoey 2016; Reich 2018). But the issues raised that the wealthy use philanthropy to set their own agendas, further their own interests, receive favourable tax benefits, and support organisations and causes which benefit themselves or their own communities are not new (Arnove 1982).

In Gramscian terms philanthropic foundations have been criticised as a tool for maintaining capitalist hegemony (Hossler & Jenness 2019; Roelofs 2007; Roelofs 2015), hand in hand with domination (Lears 1985) or manifesting as consent given by the masses to the dominant group (Gramsci 1973). Cultural hegemony is where the dominant culture uses the arts to normalise its dominance (Mulcahy 2010) so philanthropy could be seen to be supporting particular arts organisations and programs as a way to maintain ideological power or symbolic and cultural control through promulgating cultural norms and values imposed by the dominant bourgeoisie (Kohl-Arenas 2015). Only organisations which do not seek funding from those philanthropic funders can maintain independence and autonomy. Those who spread their financial reliance across various alternative resources and do not shape their programs to the funders’ imperatives avoid being agents of cultural hegemony (Sherer, Suddaby & Rozsa de Coquet 2019). Using the arts and culture as an instrument of hegemonic control discourages challenges to the invisible power of elites and provides a reminder of the benefits of the current social order (Cobb 2015), preserving the current balance of power and status quo.

Potential recipients of philanthropic funding might reshape their work to seek favour and design it to reflect outcomes and objectives they perceive might meet the needs of funders. This could be to preserve reputation, to avoid controversy or to maintain presumed moral standards. More radically, arts organisations might eschew philanthropic support to be free to create work without potential constraints and to maintain authenticity, integrity, and the capacity to criticise and air their own political and aesthetic views. This is central to the role of the arts in society as a forum for political, cultural, and social dissent and critique. However, where an arts organisation might not have the economic or financial freedom or capacity to reject funding, this could lead to it participating in maintaining cultural hegemony.

The theoretical constructs of elite philanthropy (Ostrander 1993; Ostrower 1995; Ostrower 1998), elite donor motivation (Breeze 2013, Ostrower 1995) and hyperagency, (Schervish 2000) philanthrocapitalism (Bishop & Green 2008), effective philanthropy (Katz 2005) and strategic philanthropy (Brest 2005) are relevant to funding of the arts due to the high proportion of arts funding traditionally coming from institutional philanthropic funders and the propensity of elite and high net worth donors to support the arts (Hay & Muller 2014; McLeod 2018; Ostrower 1995; Schervish & Havens 2001).

Ostrower’s (1995) pioneering qualitative study of wealthy New Yorkers focused on why the wealthy give. For those donors in the study, philanthropy supported their beliefs, values, and convictions, emphasising individualism and private initiative. Philanthropy was both a social institution and a mark of class status, symbolising personal success and affluence (Ostrower 1995). The more recent Giving Australia 2016 report (Baker, Barraket & Elmes 2016) supports the idea of philanthropy as a signaller of class status by showing that wealthy donors focus on peers as the prime audience for their philanthropy. Philanthropy is also important for donors in establishing a sense of identity and *“*a means for turning ‘riches’ into a ‘richer’ life” (Schervish 1994; Odendahl 1990; Ostrower 1995; Breeze & Lloyd 2013).

Ostrower (1995) also noted the importance of personal involvement in motivating wealthy donors to give, to achieve a sense of fulfilment through supporting their own convictions and beliefs. Breeze’s (2013) study of high-net-worth donors found that donors express a preference to give to organisations addressing direct needs, rather than the arts and culture, but paradoxically actually direct their funds to the arts, (Breeze 2013) which could be viewed as adhering to the class and status motivations presented by Ostrower (1995) and Ostrander (1993). Elite donors find an advantage in supporting the arts and culture as it is an integral part of donors’ lives and aligned with their interests (Odendahl 1990; Ostrower 1995). They support arts and culture to build status and reputation and network density among their peers (Bassens, Van Heur & Waiengnier 2018) and view philanthropy as a way to support their own elite culture, elite institutions and create or share social, cultural, or economic capital (Grenfell & Hardy 2003).

Schervish’s concept of hyperagency (2003; 2005; 2006) includes “the capacity to make choices largely within the rules and resources that are socially given, (where) hyperagency is the capacity to be a creator or producer of those rules and resources” (Schervish 2003 p.2)**.** Schervish postulated that high-capacity donors want to make a transformative difference to the area they support, and that their defining and distinguishing trait is hyperagency (Schervish 2005) which he further defined as individuals having the capacity to produce the outcomes they desire, the ability to create and produce rules and resources and the capacity to create their own “social matrix” (Schervish 2003). Hyperagency provides an understanding of the scope for philanthropists to use their institutional giving vehicles to set directions or agendas for, or in fact curate the types of art and culture which might be produced.

Hyperagency can also be where donors exert disproportionate power and use philanthropy to secure and maintain privilege and control (Odendahl 1990). By supporting particular works and artists, hyperagents can direct and influence cultural life and activity. In seeking favour with hyperagents or institutional philanthropic funders, artists might modify what they might have created to fit with the tastes and preferences of these funders leading to artistic output and presentation of particular works which suit and please the philanthropists commissioning it, but this is not necessarily a negative thing. However, Ostrander (2007) suggests that donor control exerted by high-net-worth donors can be problematic if beneficiary organisations lose their focus, discretionary judgement, and voice in relation to best deciding how to use their limited resources.

Where hyperagency has been criticised is in its hijacking of philanthropic practice when philanthropists seek to overlay their own managerial, business, or entrepreneurial skills into the non-profit sector. Hyperagency can distort the role of the state by emphasising priorities that reflect the interests of philanthropists and encourages redirecting government resources to areas championed by philanthropy (Freeland 2012; Moran 2018) or destabilise or question government priorities (McGoey 2016). In the arts, this is observed through support for flavour of the month arts companies, or those seen to be promoting national pride or current political trends (such as highlighting multiculturalism (Australia Council 1990), promoting equity and diversity (Australia Council 2020), social inclusion or disability (Australia Council 2018). The new Australian cultural policy “Revive” announced in January 2023, is based on five pillars, of which the first “puts First Nations first” (Commonwealth of Australia 2023; Prime Minister of Australia 2023).

Philanthrocapitalism, a term coined by Bishop & Green in 2006, can also be seen as a form of hyperagency. Philanthrocapitalism is contemporary wealthy actors taking a business-like approach to philanthropy (Moran 2014). It suggests that philanthropists seek solutions to big world problems (social and environmental) using market-based solutions (Bishop & Green 2015), but critics of this type of approach argue that “through embracing neoliberal ideals, philanthrocapitalism entrenches and accentuates wealth and power inequalities” (Haydon, Jung & Russell 2021, p 334).

Contemporary philanthropists are also interested in strategically engineering impact, outcomes, and structural change through their giving and attempt to deliver “strategic philanthropy” (Katz 1999; Brest 2005). Strategic philanthropy enables philanthropists to be more effective with their giving (Schambra 2008). These various critiques of philanthropy as an overreach of power, creating cultural hegemony or being an outlet for hyperagency or vanity projects are valid in some cases. However, these critiques may also detract from the good that philanthropy can bring to society and the fact that institutional philanthropy favours the arts (McLeod 2018; McLeod 2017) and is an important resource in a tightening fiscal environment (Rubio-Arostegui & Villarroya 2022), given Australian arts organisations report that 14% of their income comes from philanthropic sources (Perpetual Trustees 2019).

1. **Methodology**

Thirty-two semi-structured interviews were undertaken between July 2020 and February 2021. The interviews used the lens of critical realism, a theoretical approach to philosophical questions sitting between positivism and interpretivism (Lincoln et al. 2011). Critical realism allows for acknowledgement that the world is real – but that how people understand what happens and what they believe to be true may be coloured by their experiences and participation within community, society, and the economy. Critical realism was developed by Bhaskar in 1975 (Blundel 2007) as a response to the scientific approach of positivism and the more interaction-based paradigms of interpretivism. Critical realism accepts that the world may exist outside our experience of it, and that there are things which can be explained by how they are perceived and that are the result of the social environment. In the philanthropy context, critical realism recognises that institutions, organisations, and institutional philanthropic funders exist within the social, taxation and legal structures of society. Yet, institutional philanthropic funders may also act in ways which influence outcomes and create differing realities for grant recipients – or those who are unsuccessful. Applying critical realism to this research accepts that while the entities which fund the arts and culture exist in a social, political, and economic environment, reality in the organisational relationships being studied is created subjectively (Easterby-Smith, Thorpe & Jackson 2015) by the perceptions and experiences of the actors involved.

Interviews were conducted via Microsoft Teams and ranged from 22 to 55 minutes. Participants were trustees, founders, and staff of institutional philanthropic funders from across Australia, representing well established foundations and newer ones and reflecting a cross section of family foundations (usually PAFs, testamentary trusts, subfunds of PuAFs) and other trusts. There was an equal mix of male and female participants aged from late thirties to late seventies. Twelve interviewees were from Victoria, eight from New South Wales, and four each from South Australia, Queensland, and Western Australia.The proportion of interviewees to location reflects population sizes and mirrors the historic growth of foundation establishment around the country, with most institutional philanthropic funders located in Victoria and New South Wales.

1. **Findings**

The interviews explored networks and relationships, particularly learning and advice networks, peer mentoring and reciprocal funding relationships amongst institutional philanthropic funders of the arts in order to ascertain levels of communication, collaboration and influence. The interviews uncovered formal and informal networks and common characteristics of institutional philanthropic funders of the arts based on values, goals, strategies and passion.

The common characteristics of institutional philanthropic funders of the arts demonstrated a values-driven approach to giving to the arts. Institutional philanthropic funders might have articulated particular interests in specific artistic genres or styles, but they also want to see outcomes beyond a performance or a one-off presentation of the art. This reflects the pluralist perspectives of philanthropy introduced earlier which present the motivations for philanthropic funders as being related to reaching outcomes for public benefit or the public good (Jung 2020), funding for the benefit of society (Anheier & Leat 2013), investing for good (Bishop & Green 2008; Frumkin 2006), providing risk capital (Anderson 2013; Moran 2018) and supporting experimentation (Reich 2016). For example, Foundation 13 said that “*if you (…) look at our vision and mission, it’s about creating a more equitable society and empowering people”* while Foundation 16 is *“interested in the arts, in a flourishing arts community in Australia”.*

The institutional philanthropic funders of the arts and culture in the sample interviewed understand the societal impact and the importance of presenting new creative ideas into the public domain. They are interested in “*where arts and culture can be a catalyst for social change”* (Foundation 13)and believes *“a better, more creative and hopefully just society” (*Foundation 22).

These institutional philanthropic funders of the arts also recognise the significance of supporting the arts in regional areas to create greater access for communities which have faced barriers attending or participating in arts events. They are interested in underfunded areas such as photography and literature and in providing opportunities for more diversity in the arts through supporting writing by authors from non-English speaking backgrounds or works from First Nations artists. Thus, institutional philanthropic funders of the arts use the arts to enact or convey their own values relating to access and accessibility, excellence, creativity, imagination, education, authenticity, and integrity. Institutional philanthropic funders of the arts believe in the intrinsic and intangible value of the arts and the ability of the arts to contribute to community by increasing wellbeing, social cohesion, connectedness, and hope. This reinforces and aligns with the view that institutional philanthropic funders “harmonize individual objectives with an idea of the common good” (Adloff 2015). Our knowledge about institutional philanthropic funders is extended through this research because while Adloff (2015) contends that institutional philanthropic funders view their intervention in the common good as sacrosanct, the institutional philanthropic funders interviewed in this research understand their own fallibility and the potential to err in their decision making. But they embrace the possibility of failure and their capacity to take on risk.

An example of this is not just supporting an arts organisation taking an orchestral experience out to children in regional Australia, but actively fostering music education and learning instruments in schools for those children in order to achieve a further outcome – of a better education experience overall. Some institutional philanthropic funders of the arts have used a strategic planning process to identify the outcomes they wanted to achieve, and therefore identified music education as the vehicle to facilitate their objectives. Institutional philanthropic funders of the arts also desire “*to be a catalyst for change”* Foundation 3*.* This demonstrates a strategically wider framing of their impact area than just granting to the arts.

A commitment to values underpins how institutional philanthropic funders approach their funding decisions. The institutional philanthropic funders act on either explicit or implicit mission statements or strategies.

Some interviewees expressed that they felt challenged by questions from the researcher about philanthropic strategy, particularly those with smaller family foundations, but all of them could clearly articulate what the focus of their funding was. In a sense, they had internalised their strategic approach, even if they had not written a formal strategic plan. Here are two contrasting views on strategy: *“I would say that being strategic has been the most impactful part of our philanthropy”* (Foundation 15) and *“This is really disorganised and messy” (*Foundation 16).

Institutional philanthropic funders of the arts are at different stages in their giving journeys, depending on the age of the philanthropic vehicle they are using, and the experience and level of involvement of the directors, founders, and trustees. However, the findings reveal that they feel that they have a role to play in promoting their values, whether these include supporting innovation, commissioning new works, or providing a platform for international touring. Others may not yet have fully articulated the level of impact they would like their institutional philanthropic vehicle to achieve at this stage. Nevertheless, they understand that they are on a journey towards developing strategies around their giving and why they have particular areas of focus. The institutional philanthropic funders interviewed identified thirty-five goals and outcome areas of interest ranging from youth engagement to preservation of heritage art forms like opera. Adhering closely in their giving to their stated objectives is also an example of effective philanthropy (Katz 2005), or strategic philanthropy (Brest 2005; Haydon, Jung & Russell 2021). This form of values-based giving, forming their own goals and objectives, reinforces the view that "philanthropy allows donors to speak to the world about what they believe is valuable" (Frumkin 2006). Strategic philanthropy is a process of determining goals, developing a plan to achieve them, taking into consideration costs, risks, and benefits, and then evaluating whether these goals have been achieved (Brest 2005). Institutional philanthropic funders of the arts are taking steps to act strategically with their funding and consider their investment and support of the arts to be moving towards clearly articulated and measurable outcomes and objectives. The research has uncovered new insights into this, and it is particularly true of the institutional philanthropic funders interviewed who are seeking educational outcomes, those who seek to build the liveability and amenity of their communities and regions and those seeking excellence in the arts which they support. This extends our knowledge and understanding of institutional philanthropic funders of the arts in Australia as it takes us beyond donor motivation (Baker, Barraket & Elmes 2019; Bekkers & Wiepking 2007; Breeze 2021) and into observation of *actual* giving practises.

Conversely, strategic and effective philanthropy also presents an opportunity for arts organisations to position themselves strategically to receive funding once they understand and grasp what outcomes and objectives potential institutional philanthropic funders might be seeking where funders undertake a staged process of problem setting, direction setting and implementation (Kramer 1990).

Many of the interviewees vehemently rejected the idea that they could possibly be influencing or curating the arts. They were initially averse to this suggestion and reticent to accept it. However, their responses to questions about influence revealed layers of nuance relating to having good relationships with arts organisations, participating actively on boards or donor circles, and having access to key staff. Strong involvement based on open relationships provides opportunities for institutional philanthropic funders to voice opinions, provide direction or in fact, influence how an arts organisation might operate, or make particular programming choices.

Some institutional philanthropic funders acknowledge that without their funding input, many arts institutions or programs would not have eventuated, for example stating that “*there is no question in my mind that the (…) Fund has been hugely influential. I mean the [arts venue] doesn’t exist without it.*” (Foundation 1), and *“as a result of (our support) a number of those writers have now been staged. So that wouldn’t have happened otherwise”* (Foundation 14).

Influence can be subtle. Other examples include the staging of a particular play which had been suggested by a theatre company as a possible production. One institutional philanthropic funder had a strong emotional response to reading the novel the play was based on and was keen to see it adapted (noting that the adaptation was at the theatre company’s initiative). While the theatre company may have been intending to produce the work anyway, support from that institutional philanthropic funder enabled the production to go ahead giving that production priority over other possible programming options. This example of support for a particular play also underscores the subtle power of arts organisations themselves in terms of how what they present to potential funders is a form of curation or self-selection. Without arts organisations or artists offering ideas to institutional philanthropic funders, there would be nothing to fund or support – so the arts organisations could in fact recognise that they can be more assertive in setting the direction they wish to go in – they just must find the supporters who will go along with them on that journey.

Some institutional philanthropic funders see themselves as catalysts for change in the arts and having an impact on arts programming, both direct and indirect. They understand their own connections with arts programmers and artists both here and overseas and are able to facilitate bigger picture thinking. They also understand their own role in sparking ideas and developing new programs through their suggestions. Foundation 15 “*see ourselves as … being game changers and … being at the forefront nationally and internationally. So … who we collaborate with internationally and nationally … and where we put our money and how we make things happen … absolutely that impacts what audiences are seeing here*”.

Another foundation describes their catalytic role in bringing a program to life and that without their support the program would not have been developed. They said: *“we might have sort of like, you know lit the bonfire (for the program)*” (Foundation 22).

Some readily admit their influence but point out that it is not around programming. Rather it relates to encouraging beneficiary organisations to think bigger, to scale up programs, to create better relationships and partnerships, or to think outside the square. For example, one institutional philanthropic funder asked to view the demographic information of young people participating in a youth orchestra. When the institutional philanthropic funder saw that all the participants were from “leafy eastern suburbs”, they were inspired to fund a scholarship to enable participation of performers from disadvantaged neighbourhoods to also participate. Institutional philanthropic funders use their influence to help arts organisations think bigger and more strategically about how they approach funding or leveraging support from other potential funders.

Institutional philanthropic funders do have some say in both artistic decisions and the development of organisational structure in arts organisations. By sitting on arts boards, institutional philanthropic funders have direct influence on the appointment of artistic directors and chief executive officers. Board roles offer an exclusive position of power which many institutional philanthropic funders are fully aware of, particularly when *“The fact I am on the board as well right obviously gives me a slight degree of influence” (*Foundation 22), and “*we are in conversation with them all the time anyway for various reasons … because I am on the board*” (Foundation 16).
There is nuance as to how institutional philanthropic funders of the arts are involved with the organisations they support. They are aware of the power that they might exert, and they acknowledge a level of influence in structural issues such as endowments, and staffing, particularly in relation to fundraising or establishing endowments for longer term financial security. For example, *“the most significant giving … which ah, I think has demonstrated high impact was … matching for the endowment”* (Foundation 27) and “*we donated a million dollars to establish the endowment fund. Well, that’s a significant impact from the organisation’s perspective*” (Foundation 19)*.*

Some of the institutional philanthropic funders expressed their pleasant surprise that arts organisations were now seeking their opinions (as their funding and relationships had grown) and were actively asking for input into organisational decisions. A manifestation of the development of the funder/recipient relationship in which the considerations of the institutional philanthropic funder are considered, or their feedback sought and heeded, ensures that the relationship remains positive and will continue. While the interviewees insisted on their arms-length approach from curation in terms of selecting art works or programs, many expressed a sense of satisfaction in being on close speaking terms with the artistic and executive leadership teams and have noted a change as their giving grows. Foundation 26 noted “*we certainly get asked for our opinion about things which is interesting. We didn’t at the beginning but now quite regularly we are asked what we think.*”

Institutional philanthropic funders are aware of their influence, and they are aware that power comes with responsibility. Foundation 9 stated: *“you’re on a very big issue when one talks about what’s the power of the philanthropist.”* Some institutional philanthropic funders acknowledge this within their organisational structure by articulating clearly what they are seeking from grant recipients at the grant application stage and being transparent around eligibility and the focus of their funding leading to a less arduous process for applicants who can see more clearly whether they fit the funding criteria. Clarity reduces the pressure on grant applicants to adapt their applications or programs to meet perceived needs and desires of the institutional philanthropic funder. It also leads to a reduction in wasted time for the institutional philanthropic funder in that they will have fewer irrelevant applications to read and shortlist. The interviewees were very aware that giving away money demonstrates a form of power, and that philanthropy creates a special level of interaction with one’s local community. While many were keen to eschew their own power or influence, there was broad agreement that there are institutional philanthropic funders in the sector who wield great power by virtue of the amounts they distribute, or through their longevity and experience in the sector. Some of these were namechecked by the interviewees or held up as being the types of institutional philanthropic funders that they aspired to emulate over time.

What was surprising however, was that some of these larger institutional philanthropic funders who had been held up as exemplars also refuted the idea that they were the ones with power – and that they simply respond to community by funding the applications come across their desks which meet their criteria.

There is an acknowledgement of the power of the philanthropist, but an apparent desire to mitigate the appearance, extent and range of their influence. Institutional philanthropic funders are also aware that the final decision of where to put their funds rests with them alone (within the parameters of their constitutional and legal structure). *“[I]t is not for us as the philanthropist to tell the artist what to do, our job is to enable the artist to do what they wish. But it is our right to determine what we want to do” (*Foundation 9).

1. **Conclusion**

This research explored institutional philanthropic funders of the arts and their influence on arts and culture. It presents a significant contribution to theory about philanthropy and institutional philanthropic funders by

Firstly: identifying and understanding common characteristics of trusts and foundations which create formal or informal networks to support funding decision making in the arts; secondly, presenting a new conceptualisation of how trusts and foundations which support the arts and culture curate the arts and culture created by artists and arts organisations in Australia; thirdly, demonstrating how the priorities of philanthropic funders shape arts and culture; and finally, presenting evidence of formal and informal knowledge networks among trusts and foundations relating to funding decisions about arts and culture

This research contributes to both theory and the practice of institutional philanthropic support for the arts in Australia. This section outlines the contribution of the research to policy, practice, and theory.

The purpose of the research has been to demystify the institutional philanthropic arts funding sector where arts organisations have seen philanthropy as an unapproachable or unwelcoming behemoth given “*many donors hide behind family offices, wealth advisors, and publicists. They give anonymously through their donor-advised fund*” (Putnam-Walkerly 2020 p.25). What this research shows is that the people involved in philanthropic trusts are highly engaged with what they do. They are extremely interested in and enamoured of the arts and are keen to develop meaningful and communicative relationships with their grant recipients.

This research will assist potential beneficiaries in understanding how institutional philanthropic funders think and operate, and it provides a snapshot of the institutional philanthropic funding sector which will be useful for the sector as a whole. Understanding how institutional philanthropic funders work and how they approach various issues such as strategy and effectiveness in their giving, can provide insight for their peers through recognising similarities in approach, style, and challenges. For arts and cultural organisations this research provides insights into ways to access and develop approaches to trusts and foundations which will result in more successful grants. For philanthropic organisations it illustrates shared experiences across the same areas of interest but also provides a point from which to extrapolate how institutional philanthropic funders approach their giving across various other spheres of interest (for example homelessness, health, social and community well-being).

The research illustrates how institutional philanthropic funders evolve through a similar life cycle from keen and awe-inspired to focussed and clear in their direction, purpose, and objectives, articulating clear goals and desired outcomes. These institutional philanthropic funders move over time from personal inspiration for their giving to more formal mission and vision statements with rigorous internal processes.

This up to date and Australian perspective on institutional philanthropic funders while focussing on the arts will be of use to all charitable and not for profit organisations who seek to better understand the institutional philanthropic funder ecosystem and network, particularly as most of the institutional philanthropic funders interviewed do not fund exclusively in the arts. Accordingly, their arts funding is a snapshot of how they apply strategy and consideration to the disbursement of all of their charitable giving. This is therefore of relevance to the broader charitable and not-for-profit sector. While the focus of the research has been on the arts, the institutional philanthropic funders interviewed had broad giving portfolios across a wide range of charitable issues and causes. In addition, as there is a growing interest in professional development in the non-profit field, with several schools of philanthropy and social impact established in Australia, the UK and the US, this research will add to the academic literature which these institutions can draw on.

Ostrander (2007) noted that when donor control grows, beneficiaries have less to say about how best to use donated resources. While the research did not show an overwhelming tilt towards institutional philanthropic funders exercising power over their grant recipients in the arts, there was a strong element of engagement and involvement. Institutional philanthropic funders demonstrate a level of familiarity with artistic directors and chief executive officers of arts organisations and consider it normal and acceptable for institutional philanthropic funders to be involved in discussions around arts organisations’ plans for growth, and future ambitions. Particularly when institutional philanthropic funders approach arts organisations with their own ideas or ambitions – there was a sense that these approaches were both welcome and inspiring. The research has reconfirmed that even in an institutional setting, personal enjoyment and satisfaction is a common goal, reflecting Ostrower’s (1995) findings that philanthropy is enjoyable and conveys pleasure and emotional and intellectual involvement.

What the research has found which is new about institutional philanthropic funders and their support for the arts is the funders’ sense of it being appropriate for them to bring their own ideas to arts organisations and that their ideas would be welcome. The research has found that through the deep and trusting relationships that passionate institutional philanthropic funders have developed with their arts organisation beneficiaries and recipients, that it there is room for discussion, suggestion and dare one say, curation - of ideas, strategies, business plans or staff or business development.

Finally, this research extends our knowledge and understanding of institutional philanthropic funders of the arts in Australia beyond donor motivation through observation of their actual giving practises in the Australian context, illustrates that institutional philanthropic funders of the arts develop and aim for clearly articulated and measurable outcomes and objectives from their giving and discovers that the opportunity to signal social status (Ostrander 1995) is not a key motivator for support for the arts and culture in Australia within the sample interviewed. Through their choices and interventions or involvement in funding the arts and culture such as those presented above, institutional philanthropic funders express or demonstrate the hyperagency (Schervish 2003) of their founders and trustees. Although they might view themselves as acting independently to the state, these institutional philanthropic funders are not articulating their need for power through their giving as suggested by Ostrower (2007). that the institutional philanthropic funders interviewed respect the expertise and years of training and artistic practice of the leaders of the arts organisations they support. Trustees, founders, and staff of institutional philanthropic funders of the arts in Australia recognise that they are not experts and that they do not have the same artistic sensibility and skills as their arts and culture beneficiaries. Therefore, this research does not accord with Adloff (2009) and Ostrower (1995) who suggest that participation in philanthropy, and hyperagency emanates from ego or the desire to extend influence. Institutional philanthropic funders of the arts in Australia do have influence, but they do not “curate” the arts as such. Institutional philanthropic funders believe that they have a role to play in providing expertise and opinion (in addition to money) through their strong relationships with their beneficiary organisations. This research has demonstrated how philanthropy in the arts in Australia is where values meet passion. It has shown that institutional philanthropic funders love the organisations they support and the work that they produce, and they believe that through their giving to the arts they are making a useful and positive contribution to society, general well-being, and education.

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