Célia Schlithler, Marcos Kisil and Tatiana Otani Correia

LOCAL SOCIAL INVESTORS

Disclosing the Profile and Characteristics
IDIS is a civil society organization of public interest (CSOPI) founded in 1999, with the purpose to promote the engagement of people, families, companies and communities in strategic social actions that transform the reality, contributing to reduce social inequality in Brazil. Therefore, offer to social investors innovative and efficiently ways to apply their resources in social projects. The mission of IDIS is “Promote and structure private social investment as a tool for the development of a more equitable and sustainable society.”

This publication, produced based on accumulated experiences and learning, was produced during the DOAR Program performance, whose objective is encouraging social community investment. The DOAR Program began in 1999 and allowed the construction of community development approaches that integrate the action technologies used by IDIS nowadays. The methodology employed based on the premise that the management of private resources used for public purposes in a community can be improved if the local actors organize themselves into social networks, and if the talents and resources are leveraged to serve the social demands of the community.

To know more about IDIS, visit: www.idis.org.br

This publication had Interamerican Foundation support, an independent organ of the United State’s government, that offers grants to non-profits organizations and from community bases from Latin America and Caribe to develop innovative, sustainable and participative programs. The Foundation finances primarily partnerships between base organizations and non-profits organizations, companies and local governments, designated to improve the quality of low profit people and to fortify the democratic participation, responsibility and practices.

To know more about Interamerican Foundation, visit: www.iaf.gov
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PRESENTATION

The Institute for the Development of Social Investment (IDIS) is a civil society organization of public interest (CSOPI), committed to the efficient, effective and efficient use of private resources for a more equitable and sustainable society. Since its founding in 1999, IDIS has accumulated experience by supporting various social investors, whether it be for individuals, families or companies. One of these initiatives is the DOAR Program, which helps investors to take their communities as their main focus of action.

The DOAR program began in 2000 and enabled the construction of community development methodologies that integrate the technologies of today’s social actions used by IDIS. The basic methodology employed follows the premise that the management of a community’s private resources used for public purposes can be improved. For this, it is important that the participants of the community organize themselves into social networks and that the talents and local resources are harnessed to meet the community’s social demands.

Since the beginning of the program, IDIS proposed that these methods should be put into practice through training of the community leaders for the role of social development agents. This training was given through periodical workshops, technical support and reference bibliography. The program resulted in the creation and strengthening of six pioneering organizations, working in the São Paulo districts: Botucatu, Guarulhos, Limeira, Penápolis, Santa Barbara D’Oeste and São Jose dos Campos.

In 2007, the six organizations participated in the extension phase of the DOAR program. This phase included the IDIS Survey on the Profile of the Local Social Investor, the scope of this publication, and was held in the municipalities of Guarulhos, Limeira, Santa Barbara d’Oeste and São Jose dos Campos.

To undertake this work, IDIS was supported by the Interamerican Foundation and members of the DOAR Program from each of the cities that have established connections with local universities. The field work was done by students of these universities, with the technical supervision of Enfoque Pesquisa de Marketing, a partner of IDIS in various surveys. IDIS thanks all who contributed to this research so that its publication would become reality.

Pleasant reading!

Célia Regina Belizia Schlithler
Director for IDIS Community Development

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INTRODUCTION
by Tatiana Otani Correia

The private social investment carried out by companies has been the target of several investigations and studies, contrary to what occurs with regards to the so-called “individual giving”. There is still little systematic knowledge on that subject. Realizing the lack of such information in the country, and inspired by a study conducted by the Community Foundation Silicon Valley on giving and volunteering\(^1\) - which is already in its second version - the Institute for the Development of Social Investment (IDIS) promoted a survey on the profile and characteristics of local social investors.

Between the months of August and September 2007, four cities of the state of São Paulo, participants of the DOAR Program (Guarulhos, Limeira, Santa Barbara d’Oeste and São Jose dos Campos) were analyzed. The objectives of the study were:

- gather data on the volume of private resources locally contributed;
- heighten knowledge about the profile of local individual givers, assessing their motivations and perceptions with regards to social actions;
- identify the main causes perceived as priorities for private support.

To carry out this study, IDIS counted on the support of organizations participating in the DOAR program in these municipalities - the Institute for the Development of Limeira (IDELI), the Institute for the Development of Sustainable Social Development (DESS Institute), the GATIS Institute - Management and Coordination of Social Investment and Viva Guarulhos. Moreover, with the local universities: the Instituto Superior de Ciências Aplicadas (ISCA/Faculties), Faculdade Comunitária de Santa Bárbara – Anhanguera Educacional, Instituto Superior de Educação (UNIVAP) and the Centro Universitário Metropolitano de São Paulo (UNIFIG) were established. Field work was performed by students from partner universities, on a voluntary basis, with technical supervision by Enfoque Pesquisa de Marketing, also responsible for processing and analyzing the results.

\(^1\) COMMUNITY FOUNDATION SILICON VALLEY. Giving Back the Silicon Valley Way. 2002 Report on Giving and Volunteerism in Silicon Valley.
This publication aims to go beyond a mere presentation and analysis of the obtained data. The intention is to provoke thinking about the profile of individual givers and their significance to the sustainability of civil society organizations (CSOs), since they are the main recipients of donations.

**What is Private Social Investment?**
Private social investment is the voluntary and strategic allocation of private resources, either financial, currency, human, technical or managerial, for the public benefit. To have an impact and to promote social transformation, such investment depends on focused studies, creative planning, pre-defined strategies, careful implementation and monitoring of the results.

Thus, before presenting the survey results, the first chapter provides an analysis of the development of philanthropy from the summary of the introductory chapters of the book *Community: focus of philanthropy and private social investment*, by Marcos Kisil², who elaborates an essential historical recovery for an understanding of the findings of the survey.

The two following chapters show the results of the study, presenting a profile of givers and their motivations for giving, and then comparing them to other existing surveys.

The final chapter discusses the importance of individual giving for civil society organizations. Mostly founded by the initiative of residents of the communities, these organizations develop actions without which the consequences of social inequalities in Brazil would certainly be even worse. This chapter provides information and suggestions for CSOs to better exploit this great asset, which is the individual giver or, as IDIS prefers to call them, “local social investor”.

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I – DEVELOPMENT OF PHILANTHROPY
by Marcos Kisil

The concept of philanthropy is sufficiently old to be taken as a constituent element of today’s societies. This may be due to an intrinsic value of humanity: solidarity, which is the need to mobilize the other in order to help, depending solely and exclusively on the personal will of being supportive. This is a quality that is valued in virtually all religions and cultures, hence giving meaning to various natural gifts or talents, skills and assets, which, individually, each man is possesses.

As a first approach, philanthropy may represent initiatives of a segment of civil society that, given the need of human beings and of their inability to access resources, programs and services of government responsibilities, is organized in an alternative system to provide those goods and services through private resources allocated for public benefit. This posture may take on an additional feature to the inefficient role of the State and may bring up an aspect of charity towards the excluded. It can also contribute for the State to avoid fulfilling its responsibilities.

However, there is a second interpretation for philanthropy. It is when it gains a wider and more strategic meaning and is taken as “private social investment” (see more on this concept in page 6). Within this view, it seeks to build another alternative system to the situation of exclusion of human beings, either represented by social, economic, political or cultural marginalization. This approach uses private resources for public benefits, hence seeking to transform society. It uses creativity in their programs and projects, it tests models that help to make the goods and services more accessible, it builds relationships between different sectors and social groups, it generates human and social capital and influences public guidelines. Its commitment is with the change of society and with the change of the status quo.

Both approaches are part of the historical evolution of the concept of philanthropy in our society influenced by western Christianity, as we shall see below. However, little is known about how philanthropy or, more recently, how private social investment is manifested within the community. The importance of this issue has not been properly explored as well as how its relation to the sustainable development of a community needs to be valued by researchers and entities working in the sector.
The study presented here is an effort to better know local social investors within their community, their role, their motivations and the way by which they decide the allocation of their resources.

**From philanthropy to private social investment in Brazil**

The *Irmandade da Santa Casa de Misericórdia de São Vicente* (The Brotherhood of St. Vincent’s Holy House of Mercy), founded in 1543, was the first entity created in the country in order to care for the destitute. It was based on a type of philanthropy that embraced solidarity and mercy, prevalent in the Catholic Church since the Middle Ages.

There are countless other examples (both in education and caring for the needy and disabled people) that show that caring for the immediate needs of individuals was always the charity focus of the givers with some religious influence. This generated a model of philanthropy dependent on the church, and it spread into society.

This model prevailed in the Brazilian society for several centuries and even today it influences philanthropic actions. This explains certain groups’ resistance in abandoning the traditional word “charity” and making use of the word “philanthropy”. Although there are etymological differences between these two terms in the Portuguese language, they were used as synonyms. Philanthropy was associated with assistance-type actions, without a transforming structure of reality.

Consequently, that term assumed a political significance, which would be associated to the paternalistic practice of traditional groups who held authority and power and who would use it to create dependency between donors and beneficiaries, in order to maintain the status quo of a ruling class over the underprivileged. Hence, such denomination was abandoned by society’s progressive groups.

In the last quartile of the twentieth century, however, the Catholic Church played an important role in the resistance to the military regime, in particular through one of its more progressive lines. Inspired by the Liberation Theology and in agreement with the Human Rights guideline, that line supported the current rise and development of the Ecumenical Movement.

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3 IVAMOTO, H. S. Meio milênio de ciência, filosofia e arte misericordianas.

4 ANTONIAZZI, A. Leitura sociopastoral da Igreja no Brasil (1960-2000).
Community groups, created and influenced by the Church, began to support the union movement and other social movements of various origins. Little by little, they shifted from resistance to the regime to participative vindicating actions for the caring of social needs.

With the return to democracy in 1985, and with the promulgation of the Constitution of 1988, conditions were obtained for the development of a civil society less submissive to the State, more participatory and organized for social transformation. In the 1990s, significant initiatives emerged within social organizations. Herbert de Souza, Betinho, with his capacity for mobilization, called on society and each Brazilian to participate in the “Participatory Action against Hunger, Misery and in favor of Life”, remarkably and contagiously arousing the sense of solidarity and volunteering throughout the national territory. Abounding other such initiatives have taken place since then.

Many of them were promoted by civil society, with the support of enterprises and entrepreneurs. The phenomenon was particularly strengthened in the 1990s, and has become a movement in itself, called “Corporate Social Responsibility”, in which businesses and entrepreneurs take on roles as transforming agents of society, under a triple responsibility in their business: to be economically viable, environmentally sustainable and socially responsible⁵.

The entry of entrepreneurs with their culture of results and professionalism enabled a new understanding to philanthropy, which within that scenario began to be viewed as private social investment. And the process was remarkable in Brazil: successive studies show the growth of national participation of those involved in social and environmental development⁶.

⁵ SELKINGTON, J. Cannibals with forks: the triple bottom line of the 21st century business.

Community: Focus of private social investment

The term “community” has been used by sociologists to characterize a fundamental form of primary grouping. Tönnies defines community from a dialectical perspective, as opposed to the definition for society.²

The basis of his rationale is the contradiction that exists in every individual who seeks to identify with the people around him by adopting points of common reference, at the same time that he seeks to establish his own personality through his own differentiation. So the “community” would be the place of “collective identity”, while “society” would be the place for “Individual personality”.

Such a proposition could be set forth, although significantly reduced, through the following pun: in a community, the individuals are united, despite everything that separates them; in a society, they are separated, despite everything that unites them.

Like many other terms that have their use widely propagated, the concept of “community” has different interpretations. In general, the idea of shared identity remains. The community can then be understood as a group of people intimately linked by common values and behavior, in such a manner that if could be seen as part of a single body and relatively homogeneous.

In other words, the community would be made up of men and women who display very effective union and solidarity, not resulting from formalized agreements with defined purposes, but from an almost completely emotional identification with the whole.

For Weber, community refers to a social relationship when and insofar that the attitude in social action (...) rests on the participants' subjective feeling of belonging (affective or traditionally) to the same group.⁸

Most authors agree with the synthesized Weberian idea in the expression “Feeling of us”. While the communities are not homogeneous and may contain internal divisions, the feeling of belonging that characterizes its members gives them a common

⁷ TÖNNIES, F. Community and civil society.

⁸ WEBER, Max. The theory of social and economic organizations.
sociocultural identity, as well as the opportunity to maintain relationships that transcend the demands of many other groups.

It is possible identifying two types of identity that are useful to address a community: the “territorial identity” and “project identity”, contained in the idea of community development. The “territorial identity” is one in which individuals or social groups more easily recognize themselves as belonging to the same community. Individuals identify themselves with the places where they are born, grow up, go to school, have their family, ultimately, where they socialize and interact, forming social networks with their relatives, friends, neighbors, civil society organizations and government authorities. The identity matures as people participate in processes of social mobilization and engage with local problems and their potential solutions, taking on a participatory approach in the decisions and exercising their citizenship. Thus, each individual develops, over time, a sense of belonging to their community, from their own life story.

The second type of identity should occur with the very project of development sought by the community. The “project identity” between individuals and entities represents an important degree of maturity of a community. That is because the collective identity is built to the detriment of different identities created individually. It is in this overcoming of individualism that the basic condition for the existence of a community project comes about.

Thus, individual givers can and should achieve their desire of participating in the life of the community, becoming involved with the collective initiatives focused on the common good.

**What is known about Communitarian Philanthropy**

Despite the long history of Brazilian philanthropy, there is practically an absolute lack of information in how it manifests itself at a communitarian level and its value for community development. Studies on the situation of local philanthropy are scarce and where they do in fact exist, absolutely punctual, they do not allow generalizations for the Brazilian society.

The Institute for the Development of Social Investment (IDIS) conducted a series of surveys in the various communities that later joined the DOAR Program in order to understand what was meant by philanthropy, what was known about local
philanthropy, who were their leaders and what was the impact caused to the local society.

These surveys showed that Brazilian cities or municipalities have no information about their own philanthropy, how it is organized, who are its major players, what is the amount of resources given privately for public benefit, how much it represents in the budget of different social sectors and what its impact for improving the community’s quality of life. Among the findings are:

- the local philanthropists have no historical information on private social investments. The total value of local philanthropy is practically inexistent data in the Brazilian communities;

- local businesses, which voluntarily give goods or services to the communities in which they operate, do not properly record these values;

- the entities receiving the contributions also have great difficulty in accounting the resources received, especially when they are physical goods (other than money), services and volunteer work of its collaborators;

- in short: it is unknown how much is given, nor how much is received;

- givers act casuistically. They accept the invitation to give without paying full attention to the benefits that the community would have with the contributions. In addition, they give to those who call first, or divide their giving among the various entities they usually support;

- contributers prefer the entities that are run by people with whom they have kinship or family ties. Thus, transferring to such entities the trust they have in their relatives or friends;

- givers choose to support activities that care for children, elderly and disabled people - whether by providing basic needs (food, clothing, shelter), or by building physical spaces such as kindergartens, hospitals and philanthropic asylums;
• the behavior of a giver is rarely seen as a “social investor”. Generally, his participation ends with the contribution. The giver does not act as an investor, one who follows up on his investment to see whether it is being properly used, whether it generates the expected benefits, or if it brings about a real transformation of reality;

• givers generally act isolatedly. They do not look for synergy with the community groups that may be interested in the same causes;

• rarely is there a sense of professionalism within the act of giving. It is done empirically, and without any technical support to find out whether it is being used as best as possible with the limited resources;

• as a general result of the situations described, the contributions make local philanthropy rather inefficient (with waste of resources) and ineffective (not substantially altering a situation or social reality, or - even worse -- helping to maintain the status quo).

• Seeking to better know this universe, IDIS also identified certain characteristics of civil society organizations (CSOs) that have services financed by resources of the community’s contributors. Among them are:

• isolated performance and unaware of the work done by other organizations operating in the same areas;

• unaware of any potential for collaboration and synergy that they could have, if they acted in the same community and depended on the same sources of resources;

• lack of training for professionals and volunteers involved in providing services;

• lack of articulation. Although they are an organic part of their communities, the CSOs are not organized as a network or as a sector.

Consequently, they often compete in situations where collaboration ought to be the natural attitude.
Many CSOs have already outgrown - or are overcoming - the difficulties pointed out. But there are still many Brazilian communities where this scenario is common.

The community’s social problems and multiple needs are partly cared for by the authorities, who are unaware of what it means to be part of a local system (in which resources are voluntarily invested by the public and private sector) and therefore should perform synergistically to further the social benefit.

In that sense, the IDIS surveys have found that private resources are casuistically distributed, little strategic, hence meeting the isolated demands. They do not establish the community priorities that have to be worked on.

In addition to this, there is the unconcern with the sector’s efficient management and its professionalization. The CSOs are usually administered by volunteers or by “good-hearted” individuals, who are not always prepared to assume certain administrative functions or responsibilities and techniques, which demand a minimum of training and professionalization.

On the other hand, the government agencies and departments are unaware of the private sector’s huge potential, which could be coordinated for the benefit of public actions.

Such reality of the communities can be overcome by the desire of their leadership to pursue the common good, either with private resources or public resources. To that end, the communities need to create mechanisms for coordinating inter-institutional articulations, activate and arouse its citizen participation, inform and develop community leaders and create their own sustainable development projects.
II– PROFILE OF THE LOCAL SOCIAL INVESTOR
by Tatiana Otani Correia

The survey methodology advocated by the Institute for the Development of Social Investment (IDIS) was quantitative, and it included personal interviews with residents from the municipalities of Guarulhos, Limeira, Santa Barbara d’Oeste and Sao Jose dos Campos, these questions were systematically conducted at busy street points. 957 people were interviewed; residents from those municipalities and people over 18. The results of this survey provide valuable information, which enables to delineate the profile of the local social investor in the interior of the state of Sao Paulo.

Who is the local social investor?
The survey shows that 74% of the respondents are donors and that despite the balance; the donors are, for the most part, females (56%). Guarulhos presented the highest percentage of donors - 88%, which may be related to the fact that it has the largest GDP among the municipalities surveyed (the tenth largest in the country and third in the state).

The study Donations and volunteering in Brazil - a poll, conducted nationwide by the Institute for Studies of Religion (ISER), in 1998, indicates a percentage of 80% of donors in the country, a figure close to the result of the present survey. When compared with the survey data inspiring the present study, held in Silicon Valley (USA) in 2002, it is apprehended that there is room to expand the number of donors, given that in this region 96% of the residents declare that they practice or have already engaged in some kind of donation. Another survey by the Center for Civil Society,

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University of KwaZulu-Natal (South Africa), elaborated in 2005, also displays a strong giving culture. In this country, 93% of the population engages in some type of giving. Regarding the profile of the social investor, the IDIS Survey indicates that the donors are, by and large, from class A and B (about 40%), which enables to infer that the greater resource availability of such classes influences the act of giving.

The results also show that the higher the educational level, the greater the propensity for individuals to make donations. Donors with incomplete higher education added to those with complete higher education represent 59% of the sample. There is a correlation between age and predisposition to donating. Donors are, on average, 40 years old, and more than half are over 35 years of age (56%). The age factor might be directly linked with the individual’s income and educational level.

Another interesting detail is that most donors (77%) have resided more than ten years in the city, which shows the relevance of the established link with the local community.

<table>
<thead>
<tr>
<th>Profile of the Donators</th>
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</thead>
<tbody>
<tr>
<td>Women</td>
</tr>
<tr>
<td>Class A/B</td>
</tr>
<tr>
<td>Educational level</td>
</tr>
<tr>
<td>Complete Higher Education</td>
</tr>
<tr>
<td>Incomplete Higher Education</td>
</tr>
<tr>
<td>Age</td>
</tr>
<tr>
<td>Over 35 years of age</td>
</tr>
<tr>
<td>Average 40 yrs. of age</td>
</tr>
<tr>
<td>Time residing in the city</td>
</tr>
<tr>
<td>Over 10 yrs. 77%</td>
</tr>
</tbody>
</table>


A recent research, conducted by the Charities Aid Foundation (CAF) and the National Council for Voluntary Organizations (NCVO), in the United Kingdom, assessed the profile of individuals more likely to donate to social organizations. The study indicates very similar results to those found in the IDIS Survey. Women are the ones who donate most, especially married and middle-aged women (45-64 years), and who are among the most affluent 25% of the population.

11 CHARITIES AID FOUNDATION & NATIONAL COUNCIL FOR VOLUNTARY ORGANIZATIONS. UK Giving 2007 – Results of the 2006/07 Individual Giving - Survey on charitable giving with special reports on gender and causes.
**Ways of Giving**

The IDIS Survey enabled identifying the main forms of donations, considering the following alternatives: donations to churches; giving funds, goods to social organizations and individuals; donations to events and campaigns, and volunteering. According to the survey, a great part of the donations are made for churches (52%) and social organizations (43% in cash and 37% in goods and products). Volunteering also deserves to be highlighted, as 24% of the interviewees declared being volunteers. This was an expected result because, as the ISER study pointed out, the higher the frequency to religious cults, the greater the propensity to donating, whether in goods or money\(^{12}\). Churches, besides counting on a large percentage of donors, receive the main share of donations.

<table>
<thead>
<tr>
<th>Ways of Giving</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Giving to churches</td>
<td>52</td>
</tr>
<tr>
<td>Giving money to social organizations</td>
<td>43</td>
</tr>
<tr>
<td>Giving goods to social organizations</td>
<td>37</td>
</tr>
<tr>
<td>Giving goods and money to needy individuals</td>
<td>35</td>
</tr>
<tr>
<td>Giving to charitable events and campaigns</td>
<td>26</td>
</tr>
<tr>
<td>Giving time</td>
<td>24</td>
</tr>
</tbody>
</table>


The percentages of this table do not sum up to 100%, because the individual could choose more than one alternative (multiple answers).

Most of the donations benefit organizations from the municipalities pertaining to the donor’s residence, as the graph below illustrates. Only donations for events and campaigns are intended for organizations from other locations or nationwide. This is so given that this type of action is publicized in the media, consequently the information reaches a larger number of people in various regions.

\(^{12}\) **LANDIM, Leilah & SCALON, Maria Celi.** Doações e trabalho voluntário no Brasil – uma pesquisa.
How much was donated?
Regarding the value for the last donation held, it was found that most of the donations are between 10 and 50 Reais (Brazilian currency), varying contingent on the type. Slightly more than 45% of donations in money for social organizations included values of that order. The number of people unable to answer that question was substantial, whether due to the difficulty to remember or to estimate the value, in the case of goods.

Donors customarily practice monthly donations, mainly for churches (81%) and social organizations (79%). Donations for events and charitable campaigns are usually carried out once a year.
The annual average value of donations made to churches was of 336 Reais. However, the money donations and well as goods and products to social organizations were of 207 and 238 Reais, respectively. Compared with other forms of donation, they indicate a higher average annual value, determined on the frequency with which they are put into practice.

<table>
<thead>
<tr>
<th>Forms of Giving</th>
<th>Annual Average Donations (in Reais)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donations to Churches</td>
<td>336</td>
</tr>
<tr>
<td>Money Donations to social organizations</td>
<td>207</td>
</tr>
<tr>
<td>Donations of goods to social organizations</td>
<td>238</td>
</tr>
<tr>
<td>Donations of goods and money to needy individuals</td>
<td>189</td>
</tr>
<tr>
<td>Donations to charitable events and campaigns</td>
<td>119</td>
</tr>
</tbody>
</table>


It would be difficult to compare the annual amount of donations evaluated in this survey using data from other countries or even from other national surveys, given that many variables should be considered, whether they are methodological or related to cultural aspects and of local context.
Nevertheless, for the sake of information, it is worthwhile citing that the average value of individual donations from the residents of Silicon Valley is 2,300 US dollars per year\textsuperscript{13}. The Silicon Valley is a highly developed region of the United States, concentrating several technology-based companies, hence representing a higher annual average value of donations than other American regions (which is of US$1,620)\textsuperscript{14}. Moreover, in the US there is a philanthropic culture and tradition, and an environment with favorable tax incentives for individual donations.

The ISER survey, held in 1998, raised an average value of donations in Brazil of 158 Reais per year. Since this value is outdated by eight years, to compare it with data assessed in the IDIS Survey, monetary correction is necessary. Correcting the numbers for January 1999 to December 2007 by the IGP-M (General Index of Prices-Market) the amount of 158 Reais would equal today 396.04 Reais. The IDIS Survey found an average value of donations per year corresponding to 388 Reais, very close to the corrected result of the study by ISER. For each municipality surveyed, the values in descending order were: Sao Jose dos Campos (496 Reais), Limeira (368 Reais), Guarulhos (342 Reais) in Santa Barbara d'Oeste (325 Reais).

**Volunteer Work**

The volunteer is that "citizen who, motivated by the values of participation and solidarity, donates his time, work and talent, spontaneously and unpaid, to causes of communitarian social interest\textsuperscript{15}.” The data by the IDIS Survey reveals very positive information about this type of engagement.

As mentioned earlier, the study indicates that 24\% of the individuals interviewed declare themselves as volunteers, a higher percentage than that presented by the ISER\textsuperscript{16} survey (1998), which indicated 22.6\% of people devoting their time to help social organizations or individuals outside of their personal relations. Out of those, 16\% worked as volunteers in organizations. But as there was no major change in these

\textsuperscript{13}COMMUNITY FOUNDATION SILICON VALLEY. Giving Back the Silicon Valley Way. 2002 Report on Giving and Volunteerism in Silicon Valley.

\textsuperscript{14}SAME.

\textsuperscript{15}CARDOSO, Ruth; OLIVEIRA, Miguel D.; FRANCO, Augusto de & LOBO, Thereza. Solidarity Community: Strengthening society, promoting, promoting development.

\textsuperscript{16}LANDIM, Leilah & SCALON, Maria Celi. Donations and volunteer work in Brazil – a survey.
percentages, it can be said that the State of Sao Paulo is very close to the national average of volunteers.

The comparison with the rate of volunteers from the United States, a country with a philanthropic and volunteering tradition, enables to infer that Brazil is not far from achieving this. Data from 2006 point out that 26.7% of the North American population (61.2 million people) engaged in this type of work. Americans in that year pledged 8.1 billion hours to volunteering. There are regions where the percentage of volunteers is even higher, as for instance the state of Utah, where 45.9% of the population engages in this activity\textsuperscript{17}. Silicon Valley also stands out. Survey data show that, on average, 49% of the residents donate 13.8 hours per month to volunteer activities\textsuperscript{18}.

In Brazil, a successful initiative that uses the potential of volunteerism is the Pastoral da Criança (Community-based organization for children). Founded in 1983 by Dr. Zilda Arns Neumann and the then archbishop of Londrina, Dom Geraldo Majella Agnelo, the goal of the Pastoral da Criança is to combat infant mortality, especially that caused by diarrhea.

Thanks to the mobilization of a legion of 250 thousand volunteers, organized in Community networks of solidarity, in 2004 the Pastoral cared for 1.8 million children monthly. In the communities in which it operates, the mortality rates among children from 0 to 1 yrs. of age are 60% lower than the national average, with an investment of only R$1.37 per child per month.

If the work by the volunteers were accounted for economically, from a salary of 260 Reais (proportional to 24 hours of monthly dedication), the generated value would be of 68 million Reais, which represents twice the budget that the Pastoral receives through partnerships with businesses and other institutions\textsuperscript{19}.

\textsuperscript{17} CORPORATION FOR NATIONAL & COMMUNITY SERVICE, Office for Research and Policy Development. Volunteering in America: 2007 State Trends and Ranking in Civic Life.

\textsuperscript{18} COMMUNITY FOUNDATION SILICON VALLEY. Giving Back the Silicon Valley Way. 2002 Report on Giving and Volunteerism in Silicon Valley.

\textsuperscript{19} Text Volunteering mobilizes 23% of Brazilians, 65% of the companies claim they support volunteering by their employees, published in 2006 in the Portal do Investimento Social (www.idis.org.br)
The IDIS Survey found that on average, the volunteers devote 10 hours monthly and that 15% of them devote more than 20 hours per month, as illustrated in the chart below.

The citizens of Limeira are those who most dedicated volunteer time (on average, 13 hours/month), with 29% donating more than 20 hours monthly. Since 2000, IDIS monitors the state of affairs of the community development in the districts of the DOAR Program and therefore does not evaluate this fact as surprising.

In the book *Community: Focus on Philanthropy and Private Social Investment*, Marcos Kisil confirms the philanthropic vocation of Limeira, a city that displays spontaneous demonstrations in the three sectors, endowed with a history of pioneering in assistance and social services and with strong engagement by local entrepreneurship. When DOAR came to that city, the surveying of assets showed that 93% of the companies practiced some kind of social action and that 45% of these companies had employees who engaged in volunteer work.

![Volunteer Time Distribution Chart](chart.png)

According to the IDIS Survey, the activities developed by volunteers are quite diversified. More than half (54%) works directly with the people attended by the organization and 43% participate in events and campaigns. Limeira also stood out on account of the large percentage of volunteers who provide support to the administration of institutions: 32%, a figure found to be well above the average in the survey (17%). This type of volunteering activity demonstrates a greater commitment by the individual to the organization, as well as to its sustainability.

The city also has the highest percentage of volunteers who participate in activities organized by the companies in which they work (19%), a fact explained by the vast interaction and involvement of the local business community.

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The percentages of this table do not sum up to 100%, because the individual could choose more than one alternative (multiple answers).

<table>
<thead>
<tr>
<th>Type of Volunteering Activities</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Works directly with the individuals cared for by the organization</td>
<td>54</td>
</tr>
<tr>
<td>Participates in events (festivities, bingos), campaigns, groups</td>
<td>43</td>
</tr>
<tr>
<td>Provides support to the organization’s administration</td>
<td>17</td>
</tr>
<tr>
<td>Participates in the organization’s council and/or directory</td>
<td>13</td>
</tr>
<tr>
<td>Divulgation and fundraising</td>
<td>11</td>
</tr>
<tr>
<td>Participates um activities promoted by the company in which they work</td>
<td>8</td>
</tr>
<tr>
<td>Other activities</td>
<td>5</td>
</tr>
</tbody>
</table>

III– WHAT MOTIVATES VOLUNTEERING?
by Marcos Kisil

Given the scarcity of information in Brazil with relation to the purposes and practices of givers, in order to understand these mechanisms it becomes necessary to use information generated outside the country concerning this issue, particularly the studies carried out in the United States.

Based on the reality of American givers, Prince and File submitted, in 1994, what they called the “seven faces of philanthropy” used to classify the givers’ behavior. The authors identified seven archetypes of givers - the devout, the communitarian, the retributer, the heir, the socialite, the altruistic and social investor - demonstrating important similarities with the findings by the IDIS Survey, as will be seen in this chapter.

The first is the archetype of the devout. Frequently seen in the communities, he represents those who value the religious influence in their lives. This giver believes in the need “to do good” because this is the will of God. Giving, therefore, would be one of the ways to do good. The giver with this profile assumes a charitable character of his contributing and performs philanthropy through the church or entities linked to it. He sees giving as a tithe, which must be paid on a regular basis. Normally, it is an individual who participates in the activities of his parish, his church, but does not worry with the fate of the resources.

The second one is the archetype of the community, who believes he has a role in improving the community. This giver seeks to meet the immediate needs that appear and has difficulty in distinguishing between cause and effect. He believes that his solidarity can be easily acknowledged by his co-citizens, which strengthens his image and, possibly is good for his social, political or purely commercial insertion.

Often, he is, at the same time, donor and recipient of resources, seeing that he supports organizations that he is a part of. Givers with this profile act as philanthropists within a closed system, donating to organizations in which they participate, without any strategic actions, simply giving prestige to the services rendered by the organizations supported.

PRINCE, Russ Alan & FILE, Karen Maru. The seven faces of philanthropy: a new approach to cultivating major donors.
The third archetype is the retributer, whose contributions are seen as a “return”. In this case, the giver was at some point beneficiated by some entity and decides to repay in kind through the contribution. This is a very common practice in the U.S., where a number of individuals donated to the universities they studied or to hospitals where they or any member of their family were cared for. There are also the givers who were assisted by an organization, whether secular or religious, at difficult times in their lives and, after overcoming such drawbacks, they believe they have a personal debt that must be paid by giving.

The fourth archetype is the heir. While there it is still difficult to understand how the compromise of philanthropy moves on from one generation to the other, there are donors who believe in a family tradition of giving. It is common to see families who administer civil society organizations for several generations. In such cases, keeping the organization becomes a family obligation and therefore a “heritage” that should be taken on by each generation. This obligation also means contributing with money.

The fifth archetype is that of the socialite, the individual who gives because he thinks of it as enjoyable. This giver finds it interesting promoting charitable events, which are real parties. Thus, while at the same time funds are being raised, it is amusing. They are usually people who work with exclusive social circles and hold “actions among friends”. The parties are important because they serve to mobilize resources that will be channeled into social issues. This type of giver does not work in the organization’s day-to-day, nor is he a member of the organization that he supports, devoted exclusively to the collection of funds.

The sixth archetype is that of the altruist. For him, “to do good” means to feel good. The altruist giver believes in and involves himself with the cause that he supports. Usually, he is modest and prefers to remain anonymous. He gives as he believes he has a moral obligation, for a personal value that he needs to express, or because he believes in the cause or the project. This kind of giver keeps anonymity because he does not expect any public reward. For him, the reward is his inner well-being. Usually, he is not active in the organizations that he supports. The altruist is more concerned with the causes than with the organizations for which the resources are used.

The last archetype is that of the investor. While all the other archetypes can contribute to the benefit of society, only the investor is the one who cares systematically with the impact generated by his giving. For him, knowing the social problem in question,
seeking the best strategies and processes, knowing what results must be achieved and what the impact of his contribution is crucial in his decision to give.

Such archetype is still a minority within Brazilian society, but their presence needs to be multiplied. This is more present among the entrepreneurs, which was already expected, since they are individuals with experience in business management and who identify with the possibility to view this as professional management also for their contributions. For these givers, each contribution is seen as an achievement. They really want to, through their resources, innovate and transform society. Hence, they actively participate in civil society organizations, in order to inspire, participate and monitor their investment.

These are people who do not play the role of a passive giver, but an active investor. They are concerned with the strategic planning, with management and with the evaluation of results. They value professionalism and, consequently, surround themselves with people who understand the issue and seek partnerships.

This, incidentally, is a very important element: the givers-investors do not work alone. They learned to work in a business by relating to suppliers, customers, associations, networks and also building consortia with other companies for a particular project. Thus, they believe that these elements must be pursued in social entrepreneurship. And believe that this strategy brings sustainability to any idea; hence, they do not see the sustainability in the resource they invest in but rather in the ability of sound management of their resources.

While these models of philanthropists serve to describe the American reality, the experience of the Institute for the Development of Social Investment (IDIS) shows that they are equally found in the Brazilian reality.

But who are the givers in Brazil? The following are the data collected in the IDIS Survey on the motivational factors of givers, associating them with archetypes listed above.

**Motivating factors of givers**

Initially, the respondents were asked about their motivations behind the act of spontaneously giving, then, in a stimulated manner (providing alternatives). The main motivation presented in a spontaneous manner by the interviewees was the possibility of doing something to improve the living conditions of people and helping others
In Santa Barbara d’Oeste and São José dos Campos, that is the main factor motivating givers, cited by 68% and 70% of the respondents, respectively.

This percentage of givers may be related to three of the archetypes presented in this chapter. It can be said that, among them are the altruistic givers, who perform good deeds to feel good and meet a domestic value; the community giver, who believes in his role to improve the community; and the retributer giver, who gives in order to repay something that he received.

<table>
<thead>
<tr>
<th>Motivation to give</th>
<th>Spontaneous response</th>
<th>Stimulated response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do something to improve the living conditions of people / helping others</td>
<td>57</td>
<td>77</td>
</tr>
<tr>
<td>Religious motivations</td>
<td>17</td>
<td>41</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>15</td>
<td>49</td>
</tr>
<tr>
<td>Perform with participation</td>
<td>13</td>
<td>49</td>
</tr>
<tr>
<td>Identification to a cause</td>
<td>6</td>
<td>25</td>
</tr>
<tr>
<td>Trust in a certain social entity</td>
<td>2</td>
<td>23</td>
</tr>
</tbody>
</table>


The percentages of this chart do not add to 100%, because the individual could choose more than one alternative (multiple answers).

The second type of more frequent motivation in Brazil is on account of religious reasons (17%). That stimulus may be associated with the archetype of the devout donor, who donates for religious reasons.

Thirdly in the spontaneous survey, there is the personal satisfaction as part of the motivation for giving. This factor was cited by 15% of those interviewed and may include in its group the socialite giver, who donates for considering this a pleasant action. By linking the motivations of givers to the archetypes of the “seven faces of philanthropy” it was not possible to identify the heir giver in the spontaneous data study.

In the response to stimulated questions, besides the motivation related to solidarity/helping others (77%) there were referrals to practicing citizenship (49%), personal satisfaction (49%) and religious reasons (41%).
All the motivations were cited more when offered as alternatives to the question. This fact may suggest that most givers want “to do something” but do not usually think about their motivations for giving, because they give new meaning to the act of giving when presented with a hypothesis.

It seems that the individual giver does not see himself as a local social investor. Probably, he ignores this conception, but would like to be part of it. There is therefore a great opportunity for social organizations: to stimulate local volunteering as investments in a more equitable and sustainable society.
This chapter presents the significance of individual giving in the perspective of civil society organizations as well as data collected by the IDIS Survey about how the contributors discovered the organizations and causes they support, what areas are considered a priority and whether they follow up on the contributions.

The importance of givings for the Civil Society Organizations (CSOs)

All social organizations must be aware of their potential sources of financing, such as: enterprises, individuals, foundations/institutions, government, projects to generate income, religious institutions and holding special events. To submit a proposal for a particular source of funding it is necessary to study it, understand its characteristics, benefits, challenges, and identify the resources needed for establishing the partnership. Celia Cruz and Marcelo Estraviz\textsuperscript{22} show an interesting analysis on the theme, by addressing all these variables for the different sources of financing.

As this publication deals with individual givings, only the characteristics of what constitutes such a source of funding will be broached. It is expected that the study on the profile and motivations of individual givers contribute for the development of strategies for mobilizing resources for CSOs.

In assessing the weight of individual contributions within the budget of social organizations, it is seen that they are a significant source to ensure its sustainability. A survey by the Johns Hopkins University along with the ISER\textsuperscript{23}, in 1999, shows that 14% of the third sector in Brazil receives funding through individual giving. Comparing this to the amount invested by companies (3.2%) and with government contribution (14.5%), the importance of this feature is clear - though most of the resources (68%) correspond to the organizations’ revenue.

In considering the contributions of individuals we must understand that there are different types of individual givers and, as for each source of funding there is an

\textsuperscript{22} C\textsc{ruz}, Célia Meirelles \& \textsc{Estraviz}, Marcelo. \textit{Captação de diferentes recursos para organizações sem fins lucrativos}.

\textsuperscript{23} \textsc{Landim}, Leilah \& \textsc{Scalon}, Maria Celi. \textit{Doações e trabalho voluntário no Brasil – uma pesquisa}.
appropriate strategy for resource funding, it is vital to structure an action plan according to the type of giver chosen.

- **Sporadic giver** - is the giver who contributes eventually, when he is triggered by the organization or when he is faced with some information that motivates his supporting the organization. This type of giver can be divided into two subtypes: the simple one, who gives once, casually, generally low values; and the special one, who is part of the network leaders of the organization and, although rarely giving, contributes significant amounts. To cultivate and motivate this type of contributor is not expensive, seeing that it is important to maintain contact and request his help only when the organization needs it.

- **The frequent giver** - is the giver who continuously contributes. To attract his attention, the organization uses direct marketing tools, as mailing list or telemarketing. This giver requires more attention, whether in developing tools for his membership or to keep him involved with the CSO. Hence, the organization requires a specific team to contact him, seeking not only to win him over, but keeping him loyal. Reaching this type of giver is more expensive than the other sources of funding.

Despite the representativeness in the financing of social organizations, givings from individuals are not aimed as a source of resources for a great part of the entities. This is mainly because the individual giving is considered a slow form and high cost of funding. Often, the organization considers it as “much work” for “little resources”. However, it is worth while noting that such information does not correspond to all types of individual givers because, as shown above, the sporadic giver demands a smaller investment of time and resources.

On the other hand, individual contributions legitimize the actions of the CSOs. As Cruz and Estraviz conclude, “if these people give money and hours of their work, it means that we have a representative body, which extrapolates the original idea of the four or five founders and ensures that entity the possibility for adding more new endeavors, creating active councils, developing volunteers that defend and consequently render loyal contributing members”\(^24\).

Moreover, when considering this source of funding, the organization reduces its risk because, as it obtains the membership of a “loyal” group of givers, the departure of a part of them does not affect their finances, given that such loss does not represent a large amount of resources.

If compared to other sources of funding, the individual contributions have the following advantages:

- the resource can be used with greater freedom by the organization because it is not associated to any specific project or purpose. It can be used to finance the operational cost of the organization, which usually does not happen with other sources of funding;

- the giver can be a multiplier agent because he will defend the cause and invite people from his relationship circle to be contributors of the organization;

- the requirement is lower than with other types of givers and at the same time, there is a greater involvement of the giver;

- the response is usually faster;

- the contributions are long-term, which is the case for frequent givers;

- there is the possibility of contributing with time (volunteer work);

- individual volunteers support bold causes, (HIV/AIDS, disabled individuals, sexual exploitation of children, among others).

**Surveyed numbers**

The IDIS survey identified information on how the first contact of the volunteer with the social organization came about. Most volunteers got to know the organization by friends and relatives (41%), followed by a first contact through telemarketing (36%).

The fact that the first contact was through indication by people from their personal relationships demonstrates that the decision to give requires a relationship of trust. As in those cases the individual does not know yet the organization, he supports the establishment by relying on the analysis of the friend or relative. Perhaps the organization supported does not represent exactly the issue with which the individual
identifies with, but this may be a next step for the volunteer. This finding shows the importance of “word-of-mouth” on disclosure of the organizations.

<table>
<thead>
<tr>
<th>1st contact with the social entity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indication by relatives and friends</td>
<td>41</td>
</tr>
<tr>
<td>Telemarketing</td>
<td>36</td>
</tr>
<tr>
<td>TV campaigns and other communication medias</td>
<td>14</td>
</tr>
<tr>
<td>Visiting the place</td>
<td>2</td>
</tr>
<tr>
<td>Did not respond</td>
<td>8</td>
</tr>
</tbody>
</table>


The percentages of this chart do not add to 100%, because the individual could choose more than one alternative (multiple answers).

Although the telemarketing appears in the survey as an effective tool for obtaining contributions, the OSC must take special care to choose such a mechanism. It should consider whether it is worth it, because it is a mechanism with a high operational cost, without mentioning that the giver is not informed that part of his contribution pays the costs of this operation.

This may affect the reputation of the institution, because the giver believes that the full value of his contribution will be earmarked for the organization’s actions. This mechanism can also cause the feeling of the individual’s “invasion” of privacy and, depending on the approach of the operator; the use of information for bringing awareness to the possible contributor can pass on a negative image of the organization, which may not be in agreement with the reality.

Research has shown that, unfortunately, the number of people who got to know the organization through a visit is still small. This type of getting close to the individual is good for the organization because it may provide greater involvement and engagement of the volunteer. It is known that the greater the experience of the giver, the more this first contact is vital to the decision of supporting a particular organization.

**Priority areas**

It was also sought to identify priority areas and the key public benefited by individual contributions. According to the survey, 63% of people give to social welfare, which includes organizations that work with various assistance practices (nurseries, shelters, care for people with disabilities, asylums etc.).
Next, the following appear as priority areas: health (25%), community development (14%) and education (12%). The area of community development presented a significant increase when compared to data generated by other studies such as that of ISER. In this study, the area appeared with only 1.3% of the preference by givers. The same survey reinforces the social assistance as the preferred area of individual contributors, receiving 50% of the contributions.

<table>
<thead>
<tr>
<th>The area that receives more contributions</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Assistance</td>
<td>63</td>
</tr>
<tr>
<td>Health</td>
<td>25</td>
</tr>
<tr>
<td>Communitarian development</td>
<td>14</td>
</tr>
<tr>
<td>Education</td>
<td>12</td>
</tr>
<tr>
<td>Defense for human rights and for minorities</td>
<td>5</td>
</tr>
<tr>
<td>Culture</td>
<td>4</td>
</tr>
<tr>
<td>Sports</td>
<td>2</td>
</tr>
<tr>
<td>Generating work</td>
<td>2</td>
</tr>
<tr>
<td>Did not respond</td>
<td>8</td>
</tr>
</tbody>
</table>


The percentages of this chart do not add to 100%, because the individual could choose more than one alternative (multiple answers).

Children and Adolescents (72%) are the most benefited by the contributions, followed by the elderly (35%).

<table>
<thead>
<tr>
<th>Public attended</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children and adolescents</td>
<td>72</td>
</tr>
<tr>
<td>Elderly</td>
<td>35</td>
</tr>
<tr>
<td>Young people</td>
<td>23</td>
</tr>
<tr>
<td>Families</td>
<td>22</td>
</tr>
<tr>
<td>Adults</td>
<td>21</td>
</tr>
<tr>
<td>Women</td>
<td>12</td>
</tr>
<tr>
<td>All Publics</td>
<td>3</td>
</tr>
</tbody>
</table>


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25 LANDIM, Leilah & SCALON, Maria Celi. Doações e trabalho voluntário no Brasil – uma pesquisa.
The percentages of this chart do not add to 100%, because the individual could choose more than one alternative (multiple answers).

**Monitoring of the activities of the organizations**

When asked about the monitoring of contributions made, 74% of the individual givers claim to know their fate. This percentage is high and shows the desire they have to really make sure that their resources make a difference. On the other hand, it demonstrates a concern of the CSOs in the “accountability” of the resources they receive from society.

Most of those interviewed who know the destination of their contributions received the information through the organization itself (87%). A small portion of the contributors learned through the dissemination conducted by the media and in the organization’s site.

<table>
<thead>
<tr>
<th>How was it informed</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>The organization informed</td>
<td>87</td>
</tr>
<tr>
<td>Divulgation by communication means</td>
<td>13</td>
</tr>
<tr>
<td>The organization’s site</td>
<td>4</td>
</tr>
</tbody>
</table>


The percentages of this chart do not add to 100%, because the individual could choose more than one alternative (multiple answers).
**FINAL CONSIDERATIONS**

The data collected by the IDIS Survey on the Profile of the Local Social Investor show that individual givers of the São Paulo cities surveyed do not yet see themselves as local social investors. Although 74% of them claim know the destination of their contributions, few are concerned with finding the best strategies to confront a social problem and to monitor the impact generated by their contributions.

The contributions of individuals already are constant and frequent. Over 80% of the givers contribute monthly to churches, and 79% to civil society organizations. Most donors (77%) live in the municipality for more than 10 years where they contribute, which shows the importance of the link between the giver and the local community.

The average annual value is of R$ 388.00. And the more supported areas are: welfare social assistance (63%), health (25%), community development (14%) and education (12%). Children and teenagers are the target of 72% of the givers and 35% of the resources are for actions aimed at the elderly.

The individual givers do not only destine money and goods to organizations they support. Nearly a quarter of the respondents (24%) claim doing volunteer work, donating on average 10 hours per month. In these activities, more than half of the volunteers (54%) work directly with the people attended by the organization and 43% participate in events and campaigns. Only 17% of the volunteers support the administration of organizations - a type of voluntary action that demonstrates greater commitment by the volunteer to the organization and its sustainability.

The characteristics of the individual giver, cited above, enable to infer that there is a high potential for developing the habit of giving effectively to local social investment. And that is where there is a great opportunity for civil society organizations: to encourage local donations as investment in a more equitable and sustainable society.

The Institute for the Development of Social Investment (IDIS) has continuously encouraged local social investment, through projects that mobilize people so their contributions are always effectively targeted; the communities with which they relate. This line of work is present in both projects for individuals and families and for businesses and communities.
In the case of communities, the methodology includes the strengthening of belonging and the construction of a collective project for local development focusing on assets, factors that turn a town into a community. This methodology is applied to the training projects for Community Development Networks and had their bases in the formation of CSOPI located in cities where this survey was conducted.

Thus, it would not be inexpedient to say that such findings may have a relationship with the existence of CSOPIs. The destination of resources to social organizations (conducted by 43% of givers) and to community development (which is the focus of contributions, 14%), for example, may be influenced by the work of these OFISCs. But, certainly, such statement would have to be confirmed by means of furthering the effective surveying and conducting other surveys in cities where there are no organizations with the characteristics of the OFISCs.

Another essential factor to be considered is the location of the four cities in the state of São Paulo, the richest of the country, which probably determines the amount value given by individuals. However, the IDIS experience in community projects developed in small municipalities in a state of great social disadvantage has shown that solidarity is present in all. By simply investing in the shared view and focused on the community assets, such solidarity becomes the collective construction of projects in promoting local development.

It is also worth noting that the contributions made by individuals are now an important source of funding for organizations. This type of donation has the advantage that the resources may be freely used (including for financing the operational costs of the institution) and that by promoting the involvement of givers with the organization, it usually becomes a disseminator of the cause among their friends, relatives and acquaintances. Moreover, as each individual contribution does not usually represent a large volume of resources for the organization, when a donor retires, it will not drastically affect the finances of the institution.

IDIS hopes that this study will contribute to the development of local social investment. And it encourages the implementation of additional study on this subject.
ADDENDUM

Secondary data of the municipalities under study

The economy of the municipalities surveyed

<table>
<thead>
<tr>
<th>Economic comparative of the cities surveyed</th>
<th>Guarulhos</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S. J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population*</td>
<td>1,072,717</td>
<td>249,046</td>
<td>170,078</td>
<td>539,313</td>
</tr>
<tr>
<td>GDP (in millions of reais)**</td>
<td>18.195</td>
<td>3.514</td>
<td>1.908</td>
<td>17.680</td>
</tr>
<tr>
<td>GDP per Capita (in reais)**</td>
<td>14.928</td>
<td>13.003</td>
<td>10.435</td>
<td>30.014</td>
</tr>
<tr>
<td>Average income from formal employment (in reais – December 2002) ***</td>
<td>1,080</td>
<td>915</td>
<td>821</td>
<td>1,534</td>
</tr>
</tbody>
</table>

(*) Censo IBGE – 2000
(**) IBGE - 2004
(*** Ministério do Trabalho / Reais - 2002
Sex

- Women are major donors, specially in São José dos Campos.

There is a correlation between greater purchasing power and the habit of donating.

- We noted that in Sta. Bárbara the biggest proportion is at working class (classe C).
- In Limeira 51% of givers come from upper and middle class (classes A/B).
Age donors tend to be older, which is also related to their greater purchase power.

Donors have resided in the city longer.

Donors
Proportion of donors in the population

- 74% who answered declared to be a donor
- Guarulhos, which has the higher GDP of the four municipalities, and Limeira (which has a lower GDP and less working income than SJC, dos Campos),

The last in kind donation goes from R$ 10 to R$ 50,00

- The majority didn't answer, probably because they don't know the exact value they donated

P.3 – How much did you give in your last donation? - MA (Spontaneous)
The most common forms of donation are in kind (money) and products. However volunteering (the donation of time) represents 14% to 27%
### Amount that was given annually

P.5 / P.6 – How much do you donate to .... In a year? - MA (Spontaneous)

<table>
<thead>
<tr>
<th>Category</th>
<th>St. Bárbara</th>
<th>Average R$</th>
<th>S. J. C.</th>
<th>Average R$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donate to the Church</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donate money to social entities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donate goods and products to non profit organizations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donate to events and social campaigns</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donate to those in need</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![Donation Distribution Chart]

- **Until R$20**
- **From R$21 to R$100**
- **From R$101 to R$200**
- **From R$201 to R$500**
- **More than R$500**
- **Don’t know/didn’t respond**
The amount that was given to the Church and to social entities was higher

- Church and non-profit organizations → the annual amount is high (the higher evaluated) because the donation is frequent
- Social campaigns have a lower value because normally occurs once a year

<table>
<thead>
<tr>
<th>Average</th>
<th>R$</th>
</tr>
</thead>
<tbody>
<tr>
<td>336</td>
<td></td>
</tr>
<tr>
<td>207</td>
<td></td>
</tr>
<tr>
<td>238</td>
<td></td>
</tr>
<tr>
<td>119</td>
<td></td>
</tr>
</tbody>
</table>

- Donate to the Church
- Donate money to social entities
- Donate goods and products to non-profit organization
- Donate to events and social campaigns
- Donate to those in need

<table>
<thead>
<tr>
<th></th>
<th>Until R$ 20</th>
<th>From R$ 21 to R$ 100</th>
<th>From R$ 101 to R$ 200</th>
<th>From R$ 201 to R$ 500</th>
<th>+ than R$ 500</th>
<th>Don’t know/didn’t respond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donate to the Church</td>
<td>23</td>
<td>20</td>
<td>20</td>
<td>13</td>
<td>16</td>
<td>8</td>
</tr>
<tr>
<td>Donate money to social entities</td>
<td>16</td>
<td>33</td>
<td>19</td>
<td>21</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Donate goods and products to non-profit organization</td>
<td>14</td>
<td>28</td>
<td>13</td>
<td>13</td>
<td>9</td>
<td>23</td>
</tr>
<tr>
<td>Donate to events and social campaigns</td>
<td>33</td>
<td>30</td>
<td>11</td>
<td>8</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>Donate to those in need</td>
<td>20</td>
<td>27</td>
<td>16</td>
<td>11</td>
<td>4</td>
<td>22</td>
</tr>
</tbody>
</table>
### Amount donated in a year

<table>
<thead>
<tr>
<th>Category</th>
<th>Guarulhos</th>
<th>Average R$</th>
<th>Limeira</th>
<th>Average R$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donate to the Church</td>
<td>31</td>
<td>316</td>
<td>14</td>
<td>282</td>
</tr>
<tr>
<td>Donate money to social entities</td>
<td>14</td>
<td>202</td>
<td>26</td>
<td>264</td>
</tr>
<tr>
<td>Donate goods and products to non profit organizations</td>
<td>14</td>
<td>261</td>
<td>31</td>
<td>151</td>
</tr>
<tr>
<td>Donate to events and social campaigns</td>
<td>34</td>
<td>128</td>
<td>40</td>
<td>82</td>
</tr>
<tr>
<td>Donate to those in need</td>
<td>21</td>
<td>189</td>
<td>30</td>
<td>159</td>
</tr>
</tbody>
</table>

- **Until R$ 20**
- **From R$ 21 to R$ 100**
- **From R$ 101 to R$ 200**
- **From R$ 201 to R$ 500**
- **+ than R$ 500**
- **Don’t Know/ didn’t answer**

P.5 / P.6 – How much do you give per year? MA (Spontaneous)
The amount of time dedicated to volunteer turns around 6 hours per month or 10 hours maximum

- In Santa Bárbara, which has the lowest GDP of the four municipalities, the donation of time is also smaller (less hours)

![Histogram showing the distribution of volunteer hours per month in different municipalities.]

**P.7 – How many hours per month do you spend doing volunteer work?** One answer (Spontaneous) Based on: do some type of volunteer work (*) small basis

The majority spend their time volunteering with people and/or in community events

- The volunteers in Limeira are the most active

<table>
<thead>
<tr>
<th>Volunteer type of activity</th>
<th>Total</th>
<th>Guarulhos</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S. J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work with the public assisted by the non profit organization</td>
<td>54</td>
<td>53</td>
<td>56</td>
<td>37</td>
<td>58</td>
</tr>
<tr>
<td>Participate in events (such as a party, bingos), campaigns</td>
<td>43</td>
<td>41</td>
<td>60</td>
<td>53</td>
<td>40</td>
</tr>
<tr>
<td>Gave administrative support</td>
<td>17</td>
<td>17</td>
<td>32</td>
<td>14</td>
<td>11</td>
</tr>
<tr>
<td>Participate on the board</td>
<td>13</td>
<td>16</td>
<td>10</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>Fundraising</td>
<td>11</td>
<td>12</td>
<td>15</td>
<td>15</td>
<td>6</td>
</tr>
<tr>
<td>Corporate activities</td>
<td>8</td>
<td>6</td>
<td>19</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>8</td>
<td>5</td>
<td>-</td>
<td>1</td>
</tr>
</tbody>
</table>

**P.8 – What type of volunteer activity do you do? MA (Spontaneous)**
The decision to donate to a non profit organization is influenced mainly by family or friends or telemarketing.

<table>
<thead>
<tr>
<th>First contact with the non profit organization</th>
<th>Total</th>
<th>Guarul.</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S. J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through a family or friend recommendation</td>
<td>41</td>
<td>45</td>
<td>40</td>
<td>22</td>
<td>40</td>
</tr>
<tr>
<td>Telemarketing</td>
<td>36</td>
<td>32</td>
<td>50</td>
<td>71</td>
<td>27</td>
</tr>
<tr>
<td>TV or other media campaigns</td>
<td>14</td>
<td>15</td>
<td>7</td>
<td>4</td>
<td>18</td>
</tr>
<tr>
<td>Visit to the site</td>
<td>2</td>
<td>-</td>
<td>1</td>
<td>-</td>
<td>11</td>
</tr>
<tr>
<td>Didn't respond</td>
<td>8</td>
<td>9</td>
<td>6</td>
<td>4</td>
<td>10</td>
</tr>
</tbody>
</table>

P.9 – How did the first contact with the cause or non profit that you donated happen? - MA (Spontaneous)

Children and adolescent are the more target public

<table>
<thead>
<tr>
<th>Target public assisted by the non profit you donated</th>
<th>Total</th>
<th>Guarul.</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S. J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data in %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children and adolescents</td>
<td>72</td>
<td>76</td>
<td>64</td>
<td>81</td>
<td>59</td>
</tr>
<tr>
<td>Seniors</td>
<td>35</td>
<td>39</td>
<td>24</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>Youth</td>
<td>23</td>
<td>26</td>
<td>17</td>
<td>22</td>
<td>15</td>
</tr>
<tr>
<td>Families</td>
<td>22</td>
<td>19</td>
<td>26</td>
<td>16</td>
<td>33</td>
</tr>
<tr>
<td>Adults</td>
<td>21</td>
<td>25</td>
<td>17</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Women</td>
<td>12</td>
<td>11</td>
<td>12</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>All publics</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

P.11 – What is the public assisted by the non profit you normally donate? - MA (Stimulated)
### Social assistance organizations receive more donation

<table>
<thead>
<tr>
<th>Programmatic area that receive more donation</th>
<th>Total</th>
<th>Guarul.</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S. J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data in %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Assistance</td>
<td>63</td>
<td>61</td>
<td>62</td>
<td>74</td>
<td>68</td>
</tr>
<tr>
<td>Health</td>
<td>25</td>
<td>27</td>
<td>26</td>
<td>24</td>
<td>21</td>
</tr>
<tr>
<td>Community development</td>
<td>14</td>
<td>15</td>
<td>10</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Education</td>
<td>12</td>
<td>13</td>
<td>16</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Minority and civil rights</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Culture</td>
<td>4</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Sports</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Income generation</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Didn't respond</td>
<td>8</td>
<td>10</td>
<td>6</td>
<td>7</td>
<td>4</td>
</tr>
</tbody>
</table>

P.12 – To which programmatic area do you normally donate? - MA (Stimulated)
In the municipalities with higher GDP, there is a more control about where the donation goes

- The donors in Santa Bárbara, maybe because they donate more through telemarketing, follow less where the money goes. The individual initiative to donate should generate higher involvement.

Solidarity is the driving force of a spontaneous donation

### Motivation for an spontaneous donation

<table>
<thead>
<tr>
<th>Data in %</th>
<th>Total</th>
<th>Guarul.</th>
<th>Limeira</th>
<th>Sta Bárbara</th>
<th>S.J. Campos</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do something to improve someone's life/ help the poor</td>
<td>57</td>
<td>54</td>
<td>53</td>
<td>68</td>
<td>70</td>
</tr>
<tr>
<td>Religious motivation</td>
<td>17</td>
<td>19</td>
<td>13</td>
<td>6</td>
<td>16</td>
</tr>
<tr>
<td>Personal satisfaction</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>Citizenship duty</td>
<td>13</td>
<td>17</td>
<td>8</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Personal connection with the cause</td>
<td>6</td>
<td>7</td>
<td>5</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Trust on the organization</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>2</td>
<td>3</td>
</tr>
</tbody>
</table>

P.13 – Do you know what the organization did with the money you donated? UA (Spontaneous)
P.14 – How did you get to know what the organization did with your donation ? - MA (Spontaneous)
BIBLIOGRAPHY


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