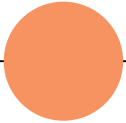


As of 20 April 2017

# REDEFINING GIVING



## FUTURE TRENDS IN GIVING 2025

A report produced by NVPC Knowledge and Advocacy  
Futures of Giving project  
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**With gratitude to the project Advisors:**  
Dawn Yip- Director and Principal Consultant, Soulbreath Consulting  
Dr Jared Poon- Lead Strategist, Centre for Strategic Futures, Prime Minister Office



*"Giving is essential and integral to every human being.  
When you deny a person the ability to give or you assume a  
person cannot give, you take away something of his humanity"*

—Philip Ong,  
Senior Director, Office for Citizen Engagement  
Ministry of Culture, Community and Youth



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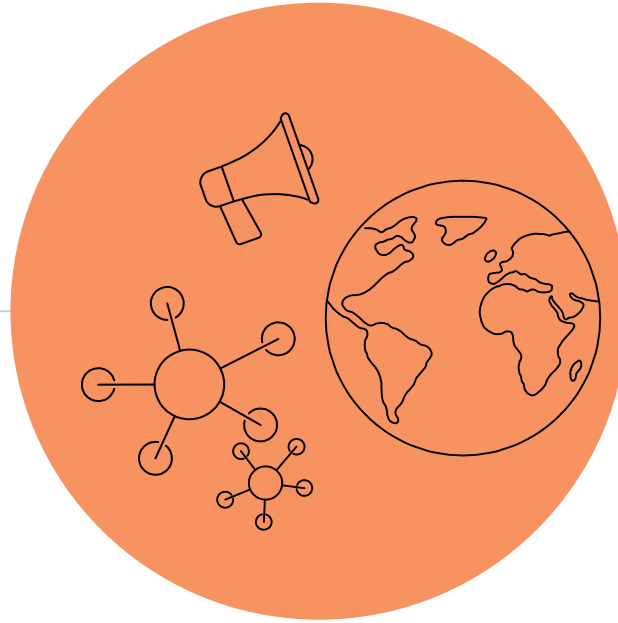
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Sharifah Sakinah Ali Alkaff  
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*Senior Consultant, National University Hospital and SLS Alumni*

Wally Tham  
*Founder, Standup4SG*



# REDEFINING GIVING

*“That day, something changed in us. Our shared moment of sorrow bonded us. Now, we don’t have to struggle to find words to define the Singapore spirit or to say what being Singaporean is.”*

–PM Lee on the passing of the late Mr Lee Kuan Yew





# WHY REDEFINE GIVING?

2015 was a watershed moment in Singapore history. The nation celebrated our 50<sup>th</sup> anniversary with year-long activities that celebrated the Singapore spirit and identity. But perhaps the clearest expression of this Singapore spirit was displayed five months earlier. In March 2015, the nation came together to pay our last respects to the Man who built modern Singapore.

We grieved and we gave. In every corner of Singapore, under the glaring sun and the pouring rain, we saw the best of Singapore. Hotels provided free chairs and refreshment, strangers gave out umbrellas and bottled water, the usually anxious and busy Singaporeans queued patiently and gave way to elderly and expectant mothers, taxi drivers offered free rides home.

These were small, spontaneous acts of giving, almost invisible against the 'traditional' notion of top dollar philanthropy and hours of dedicated volunteering efforts. But the moment was defining for one reason: Singaporeans never seemed to run out of things to give, or people to give to. Giving was and is a natural expression of who we are.

## How giving has changed over time

Over the years, we sense that the nature of giving in Singapore is changing. While we traditionally referred to volunteerism and philanthropy as the main ways of giving, this definition seems rather limiting.

Direct and ‘everyday’ acts of giving as witnessed, or what we call informal volunteerism, is on the rise. We celebrate everyday heroes in our midst—the migrant worker who saved a child hanging off a balcony, or the group of strangers who banded together to lift an overturned truck.

There are more givers today whose mindsets, motivations and behaviours differ vastly from previous eras. Over the past decade, NVPC’s Individual Giving Survey (IGS) traced the increase of volunteerism rate in Singapore from 1 in 10 in 2000, to 1 in 3 in 2016.

Informal volunteering is on the rise, as people give directly instead of going through traditional institutions. The causes that people give to remain largely the same—children, elderly and the disabled—but *what* they decide to give is changing. Increasingly there is a greater preference for skills-based volunteerism, opening up new possibilities of giving in the workplace.

The public, private and people sectors—each of which is experiencing significant shifts—are also converging at the margins. The ‘fourth sector’ is on the rise, running the gamut of social enterprises, B-corps and other entities invested in marrying social and business impact. Social purpose organizations, highly organized ground up movements (GUMs) and social intrapreneuring are also emergent signals of change (*The Straits Times*, Mar 2016).

Other important players have also emerged and strengthened the giving landscape. Intermediaries are playing a growing role to bridge the needs between ‘supply’ and ‘demand,’ while pockets of ground-up efforts, have also proliferated at the interstices.

The key drivers of these new local dynamics stem from changes at the global level. Some changes are gradual and inevitable, such as population ageing and generational shifts. Others are sudden and disruptive, like technological advancements driving the Fourth Industrial Revolution (Schwab, 2016).

We are witnessing history in the making. We are bracing ourselves for the inevitable political volatility arising from Brexit and the Trump presidency, and warily living through the new global war on terror against ISIS. On the economic front, world economies prepare to face the prospect of trade protectionism even as we undergo a period of prolonged global economic uncertainty, estimated by pundits to last until the end of the decade (Kose, 2017).

But even as we brave new perils, we remain hopeful of new promises. The generation of value-driven

millennials, already the largest generation in Singapore workforce today, are leading the way as we enter the digital economy. They live, move and work in ways so vastly different from previous generations. However their desire to connect with each other and with the humanity at large is stronger than before (Deloitte, 2017).

Can technology—often the culprit that disconnect us from each other—also be the means to reconnect us through giving? Can Giving—as this Report’s opening quote suggests—define who we are and elevate our humanity to a new level?

We live in exciting times where the question of what defines us rings more true than ever before. To redefine giving is to redefine who we are—as a nation, as humankind.

# WHY IS IT IMPORTANT TO TALK ABOUT GIVING NOW?

The non-profit sector is often characterized as “firefighting” and reacting to changes, possibly a consequence of its focus in tackling immediate needs in the community. However social issues today are becoming more complex and defy easy solutions from any one player. The sector needs to be more strategic and collaborative in our interventions, demanding better foresight and agile planning. Instead of being fixated with battling present short-term challenges, we need to anticipate what lies ahead of us and ride the waves of change to develop sustainable solutions to long-term social challenges.

Does an ageing Singapore spell a greater burden for society, or could the elderly be a fount of experiences and resources? Could the rise of informal giving spell the death of non-profits and what does this mean to us? How might we leverage social media and technology to reshape giving?

There are endless possibilities of how giving could evolve into in the next 10 years. Already we see some signals and signposts emerging from pilot projects and experimentation at the margins—microvolunteerism, time banking, retailization of giving among many other exciting developments. These signals could gain momentum in the next few years given a supportive ecosystem, and could even scale to provide innovative solutions to existing problems.

Against the backdrop of global forces and the changing context of giving today, these trends and signals call for a reexamination of what giving means today and how we can collectively redefine giving to navigate these changes.

# THE FUTURES OF GIVING PROJECT

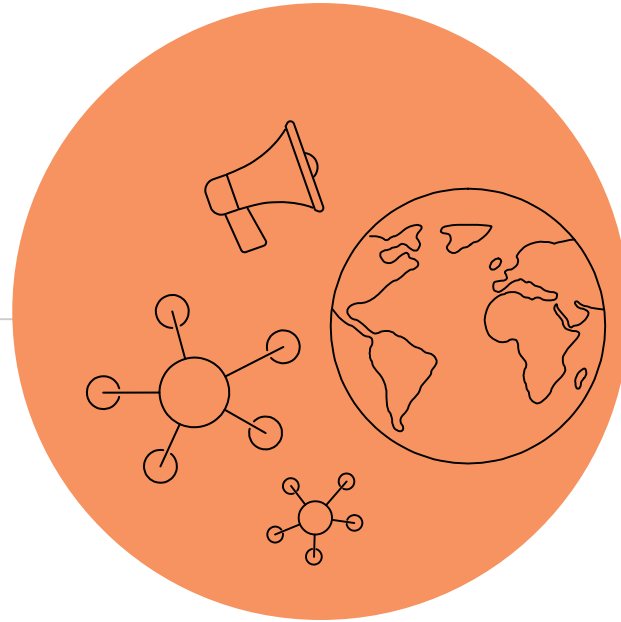
The Futures of Giving project is the manifestation of our insatiable curiosity and our first foray into co-creating the future with our stakeholders. We cannot do this alone. NVPC’s flagship survey, the Individual Giving Survey, traced how giving has changed over time since 2000. But to anticipate what is on the horizon, we need to tap into the sector’s collective intelligence and turn our gazes towards the future. We cannot do this alone.

The report is a culmination of a series of 44 in-depth conversations from October to November 2016 with thought leaders on the Futures of Giving in Singapore. These thought leaders are part of our Futures of Giving Expert Panel and comprise leaders from NPOs, corporates, the government and the academic community.<sup>1</sup>

The fieldwork comprises two components—in-depth interview and focus group discussion. In both engagements, the topics of discussion encompassed the following: (1) the current landscape of giving; (2) key trends that could impact giving in Singapore in the next 10 years; (3) implications of these trends on the giving sector; and (4) a vision of Singapore as a Giving Nation.

<sup>1</sup>Please refer to **Acknowledgement** for the full list of Expert Panel

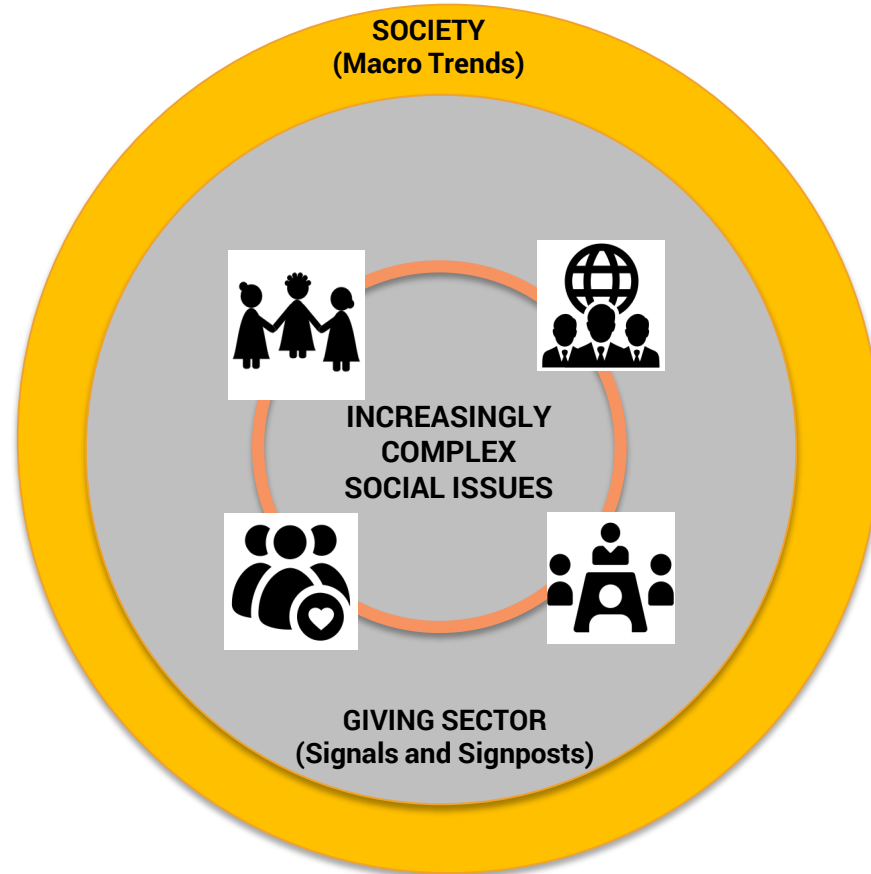




# EXECUTIVE SUMMARY

# CASTING A VIEW TOWARDS THE FUTURE

As of 20 April 2017



The changing context of Giving today

Trends that could affect the Giving Sector in future

2016

2025

# MACRO TRENDS

## What could shape us in the next 8 years?

### Digital Disruption

- Cyber-warfare
- Immersive experiential tech
- Cloud computing
- Big Data & IOT
- Digital payments

### Demographic Treasures vs Pressures

- Riding the silver wave
- Growing millennial workforce
- Fluctuating talents

### Urbanity & Environment

- Smart mobility
- Land scarcity
- Resource scarcity
- Environmental crisis

### A New Social Contract?

- Shifting cultural identity
- Increasingly divided society
- Growing civil society
- A welfarist Singapore?
- More consultative government
- Decreased trust in government

### Geopolitical Uncertainties

- Rise of global causes and threats
- Changing global powers
- Regional instability



### Changing Nature of Work

- Man vs Machine
- Freelancing culture
- Sharing economy

### Economic Restructuring




- Declining GDP growth
- Growing income inequality
- Millionaires boomtown



# MACRO TRENDS

## What could shape us in the next 8 years?





As of 20 April 2017

<p>Demographic Treasures vs Pressures</p> 	<p>The demographic structure in Singapore is expected to continue changing in the next 10 years. Rapidly aging population and talent migration will continue to shape the population dynamics, while millennials—already the biggest segment in today’s workforce—are a potential force for change.</p> <p>How should we engage the new generation of givers and how will their needs change the way we give? How would immigrants change giving in Singapore?</p>
<p>A New Social Contract?</p> 	<p>Social dynamics in Singapore are changing. A ‘new’ civil society is taking root, characterized by evolving values, changing markers of identity and vocal public debates. Meanwhile, the Singapore government seems to adopt a more consultative posture.</p> <p>Amid divisive threats to social cohesion, could giving re-patch the social fabric? Will an increasingly vocal society give birth to more community-driven actions?</p>
<p>Changing Nature Of Work</p> 	<p>The nature of work is changing with developments in technology and the economy. The new workplace is characterized by greater automation, gig economy and platforms enabling resource exchange. This will have implications on the way people work and the consequent availability—and meaning—of time and money.</p> <p>How might the changing nature of work impact on the way we think about giving? Could the discourse shift from work-life balance to work-life-give balance?</p>

# MACRO TRENDS

## What could shape us in the next 8 years?

As of 20 April 2017

<p><b>Economic Restructuring</b></p> 	<p>The sluggish economy, growing income inequality as well as widening wealth gap create fissures between the haves and have nots. This is exacerbated by the growing number of ultra high net-worth individuals in Singapore, which leads to deepening class tensions.</p> <p>How do corporates and individuals give when times are hard? How might economic pressures impact on social capital, trust and empathy?</p>
<p><b>Geopolitical Uncertainties</b></p> 	<p>Brexit. Trump. China in the South China Sea. These geopolitical watershed moments occur against the backdrop of Singapore navigating our role amidst growing political instability and global threats.</p> <p>How might the changing political climate shape our attitude towards global causes and overseas giving?</p>
<p><b>Urbanity &amp; Environment</b></p> 	<p>Amid turbulence on the global stage and worsening environmental crisis, Singapore’s physical landscape undergoes rapid changes. With technological advancements, the government is actively exploring smart mobility solutions to improve connectivity and optimize the use of limited spaces.</p> <p>How might we use urban physical spaces to influence community and build social capital? How might global climate change and the depletion of natural resources impact giving policies?</p>
<p><b>Digital Disruption</b></p> 	<p>Digital disruption in all aspects of our lives have an irrevocable impact on our notion of safety, connectivity, speed and convenience. It could also democratize giving and opens up the potential to develop scalable solutions to pressing problems in society.</p> <p>How might the application of technology redefine how we give?</p>

# SIGNALS AND SIGNPOSTS

What emerging signals have we observed among givers and giving behaviours?



As of 20 April 2017

**Discerning Donors**

Hard vs “heart” questions

**Transnational Giving**

Can we be the best *for* the world?

**Givers as Consumers**

“Retailization” of giving

**Consumers as Givers**

Purposeful consumption

**Death of NPOs**

Rise of informal giving

**Armchair Activism**

Does spontaneity trump intent?

**Smart Giving**

Match made in (app) heaven

**Micro-volunteerism**

Bite-sized goodness

**High Risk, High Reward Philanthropy**

New risk-return spectrums

**Peer to Peer Giving**

The power of DIY

**Collaborative Giving**

Dispelling philanthropy’s wealth myth

**Alternative Giving Currencies**

Variations of time, talents and treasures

# SIGNALS AND SIGNPOSTS

## What emerging signals have we observed among givers and giving behaviours?

As of 20 April 2017

<p>Discerning Donors: Hard vs “heart” questions</p>	<p>Givers are becoming more informed and willing to ask hard questions on impact measurement. Some even spend time in the community to directly understand needs on the ground. How can charities keep up?</p>
<p>Transnational Giving: Can we be the best <i>for</i> the world?</p>	<p>Givers are increasingly interested to support causes outside Singapore. This could be due to the increasingly universal nature of causes and the collapse of geographical boundaries in the digital economy. Can Singapore play a bigger role in giving to the world?</p>
<p>Givers as Consumers: “Retailization” of giving</p>	<p>As cause marketing becomes almost as sophisticated as consumer marketing, givers are being spoiled for choice and are seemingly becoming more demanding. How should NPOs respond to the changing expectations of givers?</p>
<p>Consumers as Givers: Purposeful consumption</p>	<p>As businesses adopt more socially responsible practices, consumers gravitate towards brands that reflect their values. This growing environmental consciousness could be an entry point to raise awareness of various causes and potentially convert non-givers to givers.</p>
<p>Death of NPOs?: Rise of informal giving</p>	<p>Informal giving, fueled by altruism and enabled by digital platforms, is flourishing alongside the formal non-profit sector. People increasingly volunteer or donate directly to communities of need instead of going through organizations. Will this shift of resources away from NPOs, render them irrelevant in the time to come?</p>

# SIGNALS AND SIGNPOSTS

What emerging signals have we observed among givers and giving behaviours?

<p>Armchair Activism: Does spontaneity trump intent?</p>	<p>Widespread digital and social media penetration lower the barriers to giving. Now everyone can give in just a few clicks. But does it matter if we give without knowing what or who we are giving to?</p>
<p>Smart Giving: Match made in (app) heaven</p>	<p>Big data and analytics can make giving intuitive and fun. Instead of waiting for volunteers, causes must 'go' to volunteers and bring them in to create a unique volunteering experience customized to their interest and preference.</p>
<p>High-risk, High-reward Philanthropy: New risk-return spectrums</p>	<p>Philanthropy, in particular Venture Philanthropy, could push for game changing social initiatives by taking a longer term view and bolder risks to experiment with social ventures.</p>
<p>Micro-volunteerism: Bite-sized goodness</p>	<p>Busy volunteers are starved for time but want to do good. Could small, discrete and specific tasks—both online and offline—be the gamechanger in giving?</p>
<p>Peer-to-peer Giving: The power of DIY</p>	<p>In the era of the on-demand economy and platform revolution, direct ties between givers and community can be built sans intermediaries. Could we shortcut giving?</p>
<p>Collaborative Giving: Dispelling philanthropy's wealth myth</p>	<p>Philanthropy is not just for the rich. Everyday philanthropists are coming together in various ways to pool resources to support a cause, such as crowdfunding, giving circles or community foundations.</p>
<p>Alternative Giving Currencies: Beyond time, talent and treasure</p>	<p>What we give tells of what we cherish and what defines us as a society. What are the new currencies of giving? Could time banking or bitcoins make giving more accessible?</p>

As of 20 April 2017

# THE CHANGING CONTEXT OF GIVING TODAY

## Community

The Forgotten Partner?

Individual activism | Revival of Kampong Spirit |  
Rise of ground-up movements

## State

Hindering or Enabling?

Is the state holding back the third sector? |  
Government as an enabler?



## Non-Profits

Coming of Age

Attracting and grooming talents |  
Accountability and governance |  
Investing in institutional growth |  
From fragmentation to consolidation

## Businesses




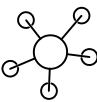
Wind of Change

'Wu Sim' (有心) Businesses |  
From ad hoc CSR to shared value

As of 20 April 2017

# THE CHANGING CONTEXT OF GIVING TODAY

As of 20 April 2017

<p>Businesses: Wind of Change</p> 	<p>Businesses demonstrate maturing corporate giving models. The new way of doing business seems to embrace giving and doing good, which some respondents termed as ‘<i>wu sim</i>’ (有心) business—business with a heart. Businesses are also moving towards greater value creation through strategic corporate philanthropy, marked by more community investment and greater leverage of multiplier effect.</p>
<p>State: Hindering or Enabling?</p> 	<p>Many respondents concurred that the sector is overly dependent on the State as the biggest funder, which holds back the potential of the third sector. However, recent government policies pertaining to donation and volunteerism are encouraging more stakeholders to step up. The State can play a more enabling role by tapping into the massive giving potential of the Public Sector, both to provide supply of volunteers, and to create opportunities that can lead to mass mobilisation of volunteers.</p>
<p>Non-profit: Coming of Age</p> 	<p>The non-profit sector is coming of age, especially in regards to human capital, governance, and capacity building. Respondents have called for better processes, corporate governance, impact measurement and communication. However fragmentation and “silo-ed” work continues to persist among NPOs, leading to giving fatigue and wasted resources. Could sectoral consolidation or cross-sector collaboration pave the way forward?</p>
<p>Community: The Forgotten Partner</p> 	<p>Often forgotten in the discourse of tri-sector collaboration, the community has always been a stalwart of giving in Singapore. Increasingly there is a greater desire and willingness from the community to step up, aided by a greater sense of individual empowerment and the widespread use of technology and social media. Ground-up movements by individuals and informal groups, often focusing on specific issues within a given community, could point to a revival of the Kampong Spirit.</p>

*“What is Giving for?”*

*If you're giving because you want to be a compassionate person, then just keep giving. But if you want to push giving to make a difference in how we build a nation, then we need to start talking about what we want our giving to lead to.*

*Once you get clarity about what people want the society to be like, how they can make a change, then giving is how you take that first step to make it happen.”*

—Patsian Low  
Social Impact Professional



As of 20 April 2017



# Appendix- Trend List

## CHANGING CONTEXT OF GIVING

### CORPORATES: WIND OF CHANGE

“Wu Sim” (有心) businesses: Every company is a good company

From ad hoc CSR to shared value

### STATE: HINDERING OR ENABLING?

Is the state holding back the third sector?

Going forward: Government as an enabler?

### NON-PROFIT: COMING OF AGE

How much does sweat equity worth? Attracting and grooming talents

Tightening the screws: Pressure on accountability and governance

In for the long haul: Investing in institutional growth

Stronger together(?): From fragmentation to consolidation

### COMMUNITY: THE FORGOTTEN PARTNER

Individual activism: Are we all latent activists?

Revival of Kampong Spirit

Rise of ground-up movements

## MACRO TRENDS

### DEMOGRAPHIC TREASURES VS PRESSURES

Riding the silver wave

Growing millennial workforce

Fluctuating talents

### A NEW SOCIAL CONTRACT?

Shifting cultural identity

Increasingly divisive society

Growing civil society

A welfarist Singapore?

More consultative government

Decreased trust in government

### CHANGING NATURE OF WORK

Man vs Machine

Freelancing culture

Sharing economy

### ECONOMIC RESTRUCTURING

Declining GDP growth

Growing income inequality

Millionaires boomtown

### GEOPOLITICAL UNCERTAINTIES

Rise of global causes and threats

Changing global powers

Regional instability

### URBANITY & ENVIRONMENT

Smart mobility

Land scarcity

Resource scarcity

Environmental crisis

### DIGITAL DISRUPTION

Cyber warfare

Immersive experiential tech

Cloud computing

Big data & IOT

Digital payments

## MICRO TRENDS

Discerning donors: Hard vs “heart” questions

Transnational giving: Can we be the best *for* the world?

Givers as consumers: Retailization of giving

Consumers as givers: Purposeful consumption

Death of NPOs?: Rise of informal giving

Armchair activism: Does spontaneity trump intent?

Smart giving: Match made in (app) heaven

High-risk, high-reward philanthropy: New risk-return spectrums

Micro-volunteerism: Bite-sized goodness

Peer-to-peer giving: The power of DIY

Collaborative giving: Dispelling philanthropy's wealth myth

Alternative giving currencies: Beyond time, talent and treasure

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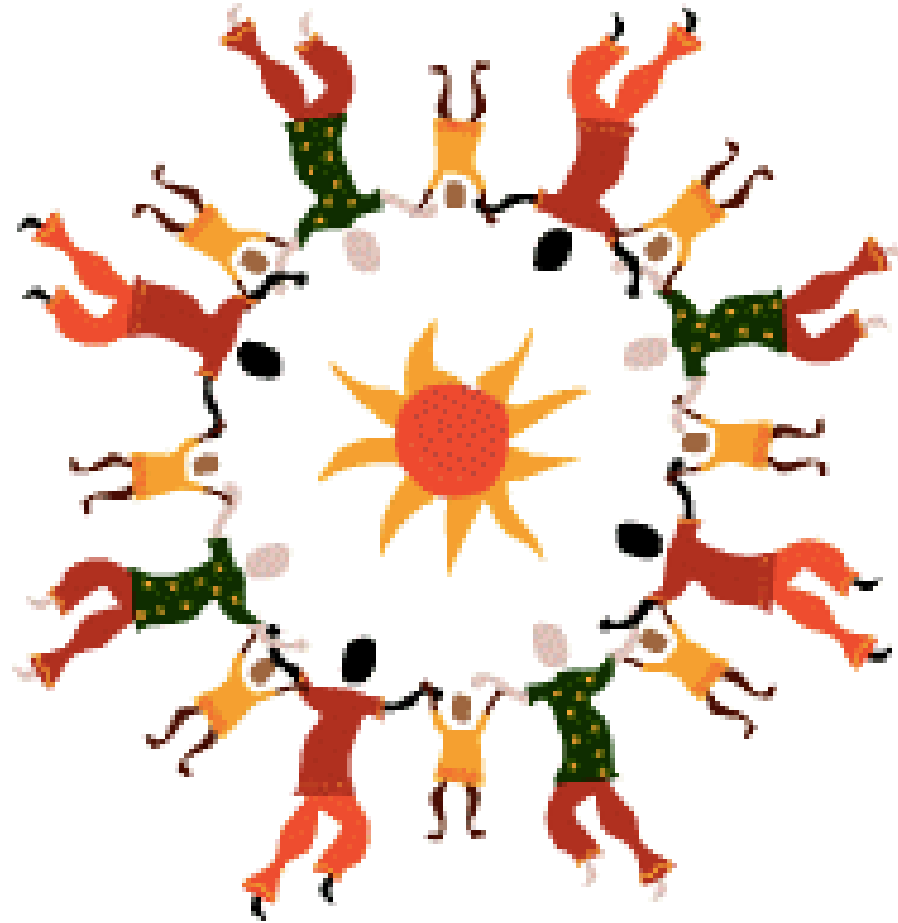
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