Future Scenarios for the charity sector in 2045

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Abstract: This paper employs a scenario planning methodology to address the question of what the charity sector will look like in 2045. Drawing on relevant literature, it describes four different scenarios reflecting a combination of drivers for the future. These can help inform future strategic planning for the sector and charities themselves.

Introduction

Recent reports paint a bleak future for charities at the local level (Alcock *et al.*, 2013; Mourey *et al.*, 2013; National Coalition for Independent Action, 2015), with generosity in decline and volunteers in short supply (Sanders *et al.*, 2008). Traditional means of philanthropy (such as regular volunteering, grants and street appeals) are being abandoned and, while new forms of giving are emerging, donors and recipients report barriers to finding productive and effective models of giving (Eikenberry & Kluver, 2004; Salamon, 2014). Further, fundraising scandals are frequently reported, suggesting regulation is not synchronized with new methods (Morgan, 2015), and controversies arise over, for example, what Kapoor (2013) calls 'celebrity humanitarianism'. Charities' preoccupation is with the short-term future, dependent on current political policies and giving models (Alcock *et al.*, 2013; Mourey *et al.*, 2013; National Coalition for Independent Action, 2015). There are also concerns that increased professionalization of the charity sector has led to higher staff perquisites, diminishing the public benefits available (Morgan, 2015).

In addition to local concerns, it appears that few countries are immune from global drivers such as: demographic changes (for example, ageing populations in the developed world), commercialization, and rapidly changing information technology that pushes charities' causes into the 'global stratosphere' (Carney, 2014; De Cagna, 2013; Enjolras, 2002; McCulloch, 2013). As a response to the changing world, in this paper we look forward one generation and ask, what will the charity sector look like in the developed world in 2045?

We employ a scenario planning methodology to address this question. Scenario planning identifies key drivers – political, social, economic, environmental, and technological – to construct scenarios to delve into, analyse and explain possible futures (Heijden *et al.*, 2002). Scenario planning embraces plurality by considering multiple possible outcomes. It requires balancing prediction, a knowledge of present conditions

and an exploration of radical futures (Yeoman *et al*., 2015). Such 'futurology' helps us to understand how possible trajectories could affect strategic choices in the charities sector (Kasper and Fulton, 2006). Kasper and Fulton (2006, p. 7), in commenting on the ability to test assumptions in these future scenarios, note: "[t]he purpose of creating them is to help craft strategies based as much on tomorrow's emerging shape as on practices from the past". If the future is to look different from the past, scenarios must also include 'surprises'. Future scenario planning can assist sector leaders, entities and stakeholders to manage uncertainty (Cuhls, 2003; Fink *et al.*, 2005).

In this study, we derive key drivers in the charity sector from the literature. We develop four scenarios, or possible futures, for the charity sector in 2045 from these drivers, and explore the implications of these possible futures on the charitable sector.

Where are we now? The charity sector in a changing world

The practice of scenario planning comprises two broad steps: first, driver identification, and second picturing a world affected by these drivers. Reviewing the literature has identified four key drivers that are influencing, and will influence, the developed world's charitable sector; these are trends in demography, technology, and two aspects of resources: funding and volunteer support.

Demographic shifts: impacts on local services and volunteers

Demographic shifts are a critical issue to which charitable organizations must respond (Carney, 2014; Gowdy *et al*., 2009; Saxton *et al.,* 2015). In the developed world attention is focused on the ageing population. The final report of the UK's Commission on the Voluntary Sector and Ageing (2015) notes that, by 2033, nearly a quarter of the UK population will be aged 65 or older. This should result in more (older) volunteers. Yet, similar to the conclusions of the European Commission (2012), the 2015 Commission notes that these people will be more unequal, significantly impacting the charity sector. More complex family structures, older populations, diversity in culture and unequal access to wealth, will be strong trends through the charity sector for the next generation at least (Commission on the Voluntary Sector and Ageing, 2015; Saxton *et al*., 2015).

Changing demographics do not predict a single future; some older people will struggle financially as pensions become less available, others will seek a carefree retirement where 'having fun' may not necessarily result in an older group of committed

volunteers (as is common now), and where those that do volunteer are more likely to want to have a say in the running of the charity (Saxton *et al.,* 2015). Carney (2014, p. 206) suggests that the "biggest challenge will be in adapting to having a much larger target group" both in needing to provide care to a larger number of older people and in having a greater population of older people that seek to volunteer and will need to be well managed.

Technological change: global reach and local efficiencies

Technology already disrupts charities' ability to raise funds, primarily by increasing their global reach and allowing for innovation (Gowdy *et al.,* 2009). Saxton *et al.* (2015) note that in 2015, 35% of the United Kingdom (UK) population uses their phones to access the internet, but that this is forecast to rise to 69% by 2020. By 2045, phones may be replaced by other devices, but reliance on technology will continue to increase. The Institute for the Future (2014) identified 'crowd-power' as a future force in philanthropy. Here, online platforms are leveraged to gain resources, as seen in the 2015 craze of the ice-bucket challenge[1] (Institute for the Future, 2014). We note that such challenges work only when charities also leverage well-formed partnerships (Gowdy *et al.*, 2009), or respond to viral opportunities in a timely and appropriate manner.

Charities for whom membership is a key input to the business model will also be disrupted by technology (De Cagna, 2013). De Cagna (2013) identifies the ability to utilize social networks without needing to 'belong' to a charity or other association. Thus, he highlights necessary innovations such as a crowd-sourcing strategy to engage key stakeholders; collaborating digitally; and doing away with a physical presence (The Institute for the Future (2014) calls this 'adhocracy'). Such resourcing may not be in local currencies, with bitcoin, credits from game-playing and so on, being mobilized as charity resources. The Institute for the Future (2014) notes that such mobilization will also call for 'radical transparency' from charities, as they are accountable for the resources they use.

Local efficiencies also arise where technology allows service coordination (Alcock *et al.* 2013). The ability to innovate in such ways will depend on the charity's mission and

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[1] In August 2014 the Ice Bucket Challenge became a social media phenomenon; it involved people dumping a bucket of ice water on their head to promote awareness of the disease amyotrophic lateral sclerosis (ALS) and encourage donations to research (downloaded from www.alsa.org/fight-als/edau/ibc-history.com).

service delivery models, but even though society is ageing, it is predicted to be technologically connected (Commission on the Voluntary Sector and Ageing, 2015). This highlights the need for a clear strategy that enables optimal choices from the many technologies available (Gowdy *et al.,* 2009), so that 'big data' and predictive analytics can help charities to envision how best to resource projects for maximum impact (Institute for the Future, 2014).

Resources: funding from government and corporates

In a recent report of what the future might hold for the charitable sector, Alcock *et al*., (2013) note that a turning point has been reached, in the UK at least. The New Public Management reforms of last century, when charity funding changed from grants to government contracts, were replaced in the 21st century with 'Big Society' and now austerity, to the extent that some wonder if it is the end of the charity sector (Alcock *et al.,* 2013). In addition, a report from the United States (US) reaffirms the blurring of sectoral boundaries which, along with the failure of many charities in the Global Financial Crisis, confirms the sector is at a crossroad (Gowdy *et al.*, 2009).

Charities have responded to these funding disruptions in diverse ways. Larger organizations have professionalized to engage with government and other funders, but smaller, regionally dispersed and voluntary organizations have reduced their engagement (Alcock *et al*., 2013). Greater regulations to ensure delivery, accountability and efficiency have arisen as the larger charities in the sector replace government delivery of social services, rather than supplementing services as they did previously (Cordery, 2012). Professionalization has raised questions as to whether the core values of the sector are being undermined by a strategy focusing on where the next dollar is coming from, and whether charities are acting more like government departments or corporates, rather than drawing on charitable, human compassion (Alcock *et al*., 2013; Morgan, 2015).

With governments focusing on austerity, charities have been drawn to partnering with corporates to remain sustainable (de Gilde, *et al.*, 2005; Philanthropy New Zealand & Funding Information Service, 2013). These partnerships raise the possibility of a 'win-win' as corporates respond to demands for social responsibility through funding and encouraging corporate volunteering (Martínez, 2003; Philanthropy New Zealand & Funding Information Service, 2013). Philanthropy New Zealand and Funding

Information Service's (2013) report on Business Giving summarizes the means through which firms currently support charities: for example, cause-related marketing, foundation grants, encouraging employee (payroll) giving, sponsorship, donations, *pro bono* services or goods, scholarships and staff involvement. Nevertheless, corporates report being overwhelmed by calls for help, and charities complain about having to make 'value propositions' when the success of many of their services are extremely hard to measure. Concerns have been raised about the ethics of these relationships (Milbourne & Murray, 2014), which have to be well managed if they are to succeed (Inspiring Communities, 2012; Philanthropy New Zealand and Funding Information Service, 2013).

Martinez's (2003) Spanish case study highlights other negative consequences of alliances that go beyond the corporate merely making grants. These include unethical behaviour by corporates which impacts charities' 'brands' and the power imbalance of corporates in any alliance. On the other hand, a 'parasitic attitude' by charities is likely to result in corporates selecting only the large, well-known and respected charities to work with (Martínez, 2003). For businesses, the main challenge is selecting appropriate social projects (Inspiring Communities, 2012).

Yet, corporates' use of their support of a charity as a marketing tool for their brand (and ensuing charity marketization) raises the danger of the charity providing services that are at odds with their mission (known as 'mission drift'), also impairing the charity 'brand' (Martínez, 2003; McKay *et la.*, 2014). The UK-based study of McKay *et al.* (2014) argues that charities trade-off between the search for commercial revenue on the one hand and seeking philanthropic grants and donations on the other. They predict that ongoing government austerity will result in a split so that some successful charities will be funded commercially to deliver goods and services, and the remainder through philanthropy and voluntary effort (McKay *et al.*, 2014). The former may experience more variable revenue streams.

Resources: support from volunteers

Tighter funding has led to increased demands for volunteers to replace paid staff in professional charities (Saxton *et al.*, 2015). Nevertheless, paid and unpaid staff are not perfect substitutes, but are often complementary, meaning both are needed (Cordery *et*

al., 2011). Accordingly, Saxton *et al.* (2015, p. 9) note that "austerity may be the root of volunteering innovation".

We have already noted the rise of corporate partnerships with charities that may also provide volunteers. These are positive moves. As new people are introduced to volunteering, there should be increased investment in voluntary support and positive spin-offs to volunteering outside of work hours (de Gilder *et al.,* 2005). However, Lee (2010) suggests that charities' volunteer managers face significant challenges in managing such volunteering.

There is other evidence that volunteering is changing. Nichols *et al.* (2005) note a reduction in willingness to volunteer, relating to changes in notions of citizenship within society and reducing engagement in collective action. In contrast to the long-term volunteers who commit to a particular organization and regularly volunteer for the same tasks (for example, in sports), Rochester *et al.* (2012, p. 104) note that episodic or short-term volunteering is a "rapidly growing phenomenon". These episodic volunteers may be interim (over a short period) or temporary (once only) (Rochester *et al.*, 2012).

Further, virtual, online or cyber-volunteering that can be done 'any time, any place' is a way that technologically-savvy (often young) volunteers can volunteer across geographic and physical boundaries (Smith and Cordery, 2010). Indeed, volunteering innovations include the need to respond to the rise of technologically-driven micro-volunteering, and a growing pool of older volunteers, making the rise of inter-generational volunteering an opportunity (Commission on the Voluntary Sector and Ageing, 2015; Gowdy *et al*., 2009; Smith and Cordery, 2010). Gowdy *et al.* (2009) warn that voluntary work will not always be undertaken for formal charitable organizations, again highlighting the crossroad at which the sector finds itself. Virtual volunteering and online activism require charities to show they add value to civic engagement on the local and global stage. They also require the development of systems that can manage cultural and other demographic diversity (Commission on the Voluntary Sector and Ageing, 2015; Gowdy *et al.,* 2009).

Even when charities attract volunteers in innovative ways, Nichols *et al.* (2005) provide examples of strains on charities due to changes in societal attitudes to risk, pressures to professionalize and the need to attract specialist skills. Overall, there is concern that

even if volunteers are attracted to a charity, they will be difficult to retain if charities lack a supportive volunteering infrastructure (Smith and Cordery, 2010).

Futurology

The current state of charities in a changing world leads to many possibilities for the charity sector in 2045. Given the scarcity of funding, in 2045: will commercialization rather than compassion drive charitable operations? Will global technology crowd-out local service efforts? Will volunteers be available? Will they be too demanding, or will demographic and technological shifts radically reduce or increase volunteers' availability?

While few academics have considered the long-term future of the charitable sector, futurologists have attempted to predict how our future world will be shaped (Heijden *et al.*, 2002; Kasper & Fulton, 2006; Mowat Centre, 2014; Yeoman *et al.*, 2015). Strategic planning can build on future scenarios to prepare for risks and opportunities. Futures studies presented for other contexts can provide a wider frame for this study (Fink *et al.*, 2005). A number of studies actively utilize drivers of change to construct these scenario maps (for example, European Commission, 2012; Ong, Lockstone-Binney, King, & Smith, 2014; PricewaterhouseCoopers, 2014; Yeoman *et al.*, 2015), other times the drivers are less obvious, but can be inferred (for example, National Intelligence Council (NIC), 2012).

These examples of scenario planning studies show how identified drivers can be used to suggest multiple futures. Two regional studies are presented: *Global Trends 2030: Alternative Worlds* from the US-government's National Intelligence Council (NIC, 2012) and the European Commission's (2012) *Global Europe 2050*. Three further studies into segments or sectors of economies are also presented: *Global Megatrends Shaping Governments* by the Mowat Centre (2014), *The Future of Work* by PricewaterhouseCoopers (2014), and *Tomorrow's Tourism* from Yeoman (2012). These studies provide insight into the power of such scenarios for future planning.

Regional futures studies

The NIC (2012) considered the future of the United States in 2030. In addition to demographic changes (ageing, urbanization and migration), they identified: individual empowerment (especially with the rise of the middle class), diffusion of power rather than hegemony, and dramatic increases in demand for food, water and energy. They

also noted the potential for increased global conflict and instability, economic crises and the impact of new technologies. These drivers led the NIC to describe four potential worlds for the US: a worst-case scenario of stalling globalization, a best-case scenario being collaboration between the US and China, and two less-plausible but very possible scenarios of a world driven either by social tensions and inequalities, or one where new technologies give rise to powerful non-state actors who "take the lead in confronting global challenges" (NIC, 2012, p. 7).

The European Commission (2012) drew on a number of key drivers to define three possible futures for Europe in 2050. The drivers were: demographic trends (as noted above), energy and environment pressures (including climate change and energy use), economic and technological advances, and geopolitical instability. These drivers suggested three possible futures: 'Nobody cares: standstill in European integration', 'EU under threat: a fragmented Europe', and 'EU Renaissance: further EU integration' (European Commission, 2012). These scenarios allowed quantitative modelling of the possible futures to predict such issues as energy prices and efficiency, population migration, and needs for education, and capital investment. Qualitative analysis was also undertaken to describe possible futures, challenges, 'wild cards' and possible research and innovation policies that could arise from those futures.

Segments or sectors

The European Commission's (2012) futures study enables governments to plan, as does the Toronto-based public policy think tank Mowat Centre's (2014) 2030 global mapping produced for PricewaterhouseCoopers. They use nine drivers split into three groups of three drivers each. In terms of individuals, they note (i) demographic change and the need for pensions for longer-lived citizens and jobs for the large youth populations, (ii) the rise (or concentration) of individualism, and, similar to the above futures research, (iii) enabling technology (Mowat Centre, 2014). For their physical environment grouping, they cite (i) climate change, (ii) pressures on natural resources and (iii) increased urbanization. The global economy is their third grouping with (i) economic connectedness of citizens, (ii) citizens' expectations that governments will bring debt under control, and also (iii) that governments will manage the economic power shift as emerging economies grow (Mowat Centre, 2014). Rather than developing future scenarios, the Mowat Centre (2014) encourages governments to fully understand the impact of these megatrends (drivers) on their own country's economy

and social infrastructure. Such understanding should enable better policies, regulation and programmes for their futures.

PricewaterhouseCoopers (2014), in conjunction with the Oxford University's James Martin Institute, adopted a scenario analysis for their report on the Future of Work 2022. The dominant global forces – drivers – they identified as having the greatest impact on people management were constructed into a matrix ranging from business fragmentation to corporate integration, and from collectivism to individualism. Three plausible future scenarios of work were developed: 'blue world – corporate is king' driven by capitalism and globalism and typified by the corporate career; 'green world – companies care' driven by employees and consumers demanding positive environmental and social impacts from businesses; and 'orange world – small is beautiful' with business fragmentation where technology enables flexibility and specialization.

In another application of scenario analysis, Yeoman (2012) draws on three drivers - technology, wealth, and resources to forecast different futures for tourism in 2050. Of particular interest for the charity sector of the future is the predictions on tourist volunteers, many of whom assist charities in the environmental and animal welfare space, although again not without controversy (see, for example, orphanage tourism, Guiney and Mostafanezhad, 2015). Ong *et al*. (2014) suggest that growing concern about climate change is likely to negatively affect volunteers' willingness to travel. Nevertheless, in another scenario, they argue that increasing numbers of natural disasters could positively affect the numbers of tourist volunteers. In their third scenario, technology supersedes the need for physical travel and these volunteers prefer instead to provide loans and donations and virtual volunteer tourism. Scenarios for tourist volunteers in 2050 provide insight for the charity sector.

**Future scenarios for the charity sector in 2045**

These future studies and the literature review above of the charity sector in a changing world are now developed into four possible scenarios for the charity sector's future. In deriving future scenarios, futurologists recognize the complex interplay and unpredictability of drivers, and so multiple worlds are forecasted, each shaped by different drivers of different strengths (Yeoman, 2012). These futures are typically exaggerated extremes, representing the potential consequences of a small number of

key contextually-specific drivers (including trends and current issues) as a combined set (see, for example, European Commission, 2012; PricewaterhouseCoopers, 2014). The real future will likely be found in the overlap between the potential worlds, drawing aspects from all of them (Yeoman, 2012).

We have already noted demographic changes, technology and strong trends of resourcing (funding and volunteers) as drivers in the charity sector's future. From these we derived two sets of extremes. The first set of extremes derived from the literature is between increasing globalization through increasing migration and technology; its opposite is local efforts to deliver charity (Institute for the Future, 2014; Morgan, 2015). These extremes of local services and globalization are fuelled by the ability (or otherwise) to attract and retain volunteers and technology. Charities' resourcing describes the second set of extremes, as the marketization of charities has raised concerns that the charitable sector will be at risk of diverging from its compassionate mission if it is to adopt the values of the market by seeking commercial revenue (Eikenberry & Kluver, 2004). This is relevant to government and corporate funding, as the drive for small government (of which austerity is a symptom) has further forced marketization in resolving social needs. Hence, the opposite extreme to marketization is compassion – the value at risk (Alcock et al., 2013). Milbourne and Murray (2014, p. 6) state this more strongly, noting "competition and profit motives are blatantly inappropriate for welfare and in producing good quality services in supposedly caring services".

Figure 1 shows these extremes and four possible future worlds (starting at the top right and moving anti-clockwise): Government-funded Elite (Mega Charity), Corporate Cooperation (Charity Ltd), Home Grown (My Charity) and Crowd-Sourced (Our Charity). In each case, we propose an archetypical charity that embodies the dominant features of the scenario.

Figure 1: Four possible futures for the charity sector in 2045
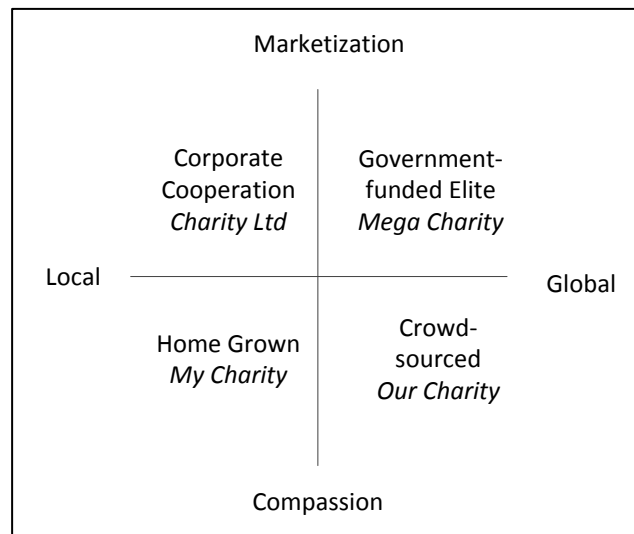
The first two scenarios concern marketization and show the contrast between global and local extremes.

Government-funded elite

Mega Charity has responded to governments' increasing austerity drives by becoming the provider of choice in an elite group. Therefore, despite austerity, Mega Charity continues to grow, through what Murray and Milbourne (2014) term 'predatory behaviours', expanding its services to include those already being offered by smaller charities. Mega Charity takes every opportunity to access government funding, including in the global 'market' following natural disasters and from international aid (which are likely to increase, see NIC, 2012).

Corporate Cooperation

Charity Ltd leaves the global scale of governmental funding to Mega Charity and instead focuses on corporate funding. Corporates are more likely to seek local impact to increase their market share (Lee, 2010; Martínez, 2003) and could become like 'mini-states' as they assume a prominent role in society (PricewaterhouseCoopers, 2014). Charity Ltd targets corporates for whom the social and environmental agenda has forced fundamental changes to strategy (PricewaterhouseCoopers, 2014). This agenda is on the rise due to pressures on energy and the environment (as identified by the European Commission (2012), Yeoman (2012), the NIC (2012) and the Mowat Centre (2014)). Charity Ltd knows that corporates wish to report that they are being more responsible in making their money (Martínez, 2003), and want to show that their staff

are actively volunteering for the public good (de Gilder *et al.*, 2005). Nevertheless, such charity revenue can be volatile, as grants and donations are substituted for corporate support (McKay *et al.*, 2014), driving Charity Ltd's strategy and delivery further into corporate marketization and away from compassion (Murray & Milbourne, 2014).

The other two scenarios are driven by compassion rather than marketization. Again we contrast local and global extremes.

Home Grown

My Charity is compassionate and has a local focus. Key drivers for My Charity are the rise of individual empowerment and also the ageing population (European Commission, 2012; Mowat Centre, 2014; NIC, 2012). It is imperative that My Charity captures able, older citizens to volunteer for and donate to its cause, especially since My Charity has become extremely busy serving an increasingly diverse population with urgent social needs (not necessarily age-related) (Commission on the Voluntary Sector & Ageing, 2015). My Charity needs to develop different approaches in different areas, ensuring its local responses are flexible to users' needs. My Charity seeks also to foster new models of resourcing which will attract more supporters (Commission on the Voluntary Sector & Ageing, 2015).

Crowd-sourced

Our Charity harnesses technology, depending on a globally-focused 'crowd-sourced' world (Institute for the Future, 2014). Our Charity is a heavy user of the most up-to-date technology to deliver better services (through people or robots) and it exploits online platforms (in whatever form they take in 2045), channelling crowd-sourced donations, volunteering, and other support for its charitable purposes (Institute for the Future, 2014). Our charity builds on the increasingly important social capital that sees relationships as key to success (PricewaterhouseCoopers, 2014). As Our Charity draws on different currencies, crowd-power radically reshapes its resourcing (Institute for the Future, 2014; Saxton *et al.*, 2015). It employs large numbers of individuals who donate small amounts of time doing relatively unskilled tasks (micro-volunteers), and its volunteers are inter-generational to include the ageing population (Commission on the Voluntary Sector & Ageing, 2015; Saxton *et al.*, 2015). Our Charity knows that individuals want to be empowered (Mowat Centre, 2014; NIC, 2012), which it

encourages through storytelling and allowing donors to donate directly to specific individuals or projects.

Discussion and conclusions

We employed a scenario planning approach to address what the charity sector and individual charities may look like one generation from today (in 2045). First, we identified key drivers from literature describing the sector today and the challenges it faces, and we presented a selection of futurology research which has considered regions and sectors. The purpose was to understand possible worlds to inform strategic planning in the sector and in charities themselves. As the sector is at a crossroad, the emergent shape of tomorrow must be combined with the practices of the past, to make sense of what the future might hold (Kasper & Fulton, 2006).

Using extremes we then presented four different charity types. Each scenario has drawbacks, or 'danger zones', which must be mitigated if the scenario, or even elements of the scenario, are realized. If the sector becomes replete with Mega Charities, then their preferential receipt of government income will crowd out smaller, and locally-based charities. Indeed, Milbourne and Murray (2014, p. 3) note that, already, "smaller, locally based organizations [are] suffering disproportionately from the reduction in resources available and pressures on local services". As charities have traditionally assisted government in linking to local citizens, a government-funded elite will change the face of civil society. The non-funded, non-elite will struggle to survive. What if small charities disappear completely? Will Mega Charities become government departments in all but name? Will the drive for efficiency and quota-filling to compete for government contracts completely strip compassion from the charitable sector?

Filling the sector with Charity Ltds is likely to highlight the drawbacks of corporate cooperation (see, for example, Inspiring Communities, 2012; Philanthropy New Zealand & Funding Information Service, 2013). Will Charity Ltds become merely public relations arms of transnational corporations who wish to be seen as doing good, rather than actually carrying out their charitable missions? This resourcing model is dependent upon corporate resources, and with globalization, will Charity Ltds harness sufficient stable resources to survive and deliver their localized missions?

The danger zone of My Charities is based on the ethos of the sector – relationships. Building longer term relationships is essential in the charity sector (Lee, 2010; The

Centre for Social Justice, 2013) and indeed this may attract volunteers to local charities. Nevertheless, a danger zone exists when an increasingly older population sees local charities' spaces as 'homes-away-from-home' and socialize there rather than assisting with charities' missions. What if those older (and committed) volunteers hinder rather than help? Will My Charities be agile enough to respond to the localized demographic shifts in both resourcing and social need?

Despite the compassionate nature of <u>Our Charities</u>, this scenario's danger zone is the dependence on philanthropic support from a global, technologically connected populace. It is likely that Our Charities' donors do not have the view of the whole landscape of social need, and therefore they consider only specific outcomes. How do Our Charities addressing localized need or unglamorous problems attract the attention of a global citizenry? Commentators, like Chomsky, have warned of increasing corporate encroachment on net neutrality and the freedom of the internet,[2] meaning that increased advertising and limits to accessibility are likely to be a feature of technology in 2045. What if maximising Our Charities' donations depends on corporations that control the internet, rather than crowd-power?

In this paper, we have identified marketization and compassion as one set of extremes, alongside local versus an increasingly globalized society, although we recognize that other investigations of drivers may have resulted in different extremes. In order to ratify our choices, the next step would be to undertake in-depth discussions (interviews and/or focus groups) with experts and sector participants. Such socialization could also provide other examples to use within the scenarios. We also note the focus of the futures material studied, and thus our paper, is on the developed world. While the global is a dimension of our scenarios, this is considered within the context of charitable entities based in the developed world. Further research is therefore required on drives of the charitable sector on a global basis, incorporating developing work perspectives. Nevertheless, in offering four possible worlds for 2045, we have highlighted the impact of drivers within these extremes and also the 'danger zones' or drawbacks that could occur if these futures are to become reality. This research raises many questions which are issues for future research. These questions also represent a means by which attentive

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[2] Downloaded from the internet 28 May 2016, from: http://www.thebewilderedherd.org/apps/videos/videos/show/12473067

participants in the charity sector can ensure that they respond to the nature of this changing world.

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