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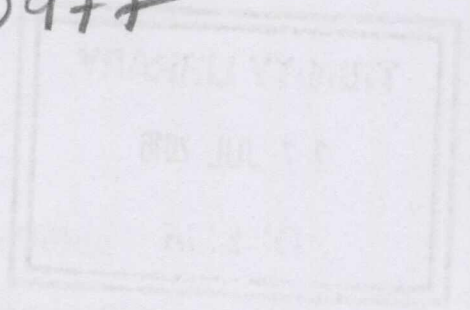
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The role of brands as frames for engagement in meeting pro-social goals: a multi-study investigation

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Supervised by: Professor Malcolm MacLachlan & Professor Stuart Carr.

SEPTEMBER 20TH 2015.

This dissertation is submitted to the University of Dublin in fulfillment of the requirements for the award of a Doctorate in Philosophy, School of Psychology.

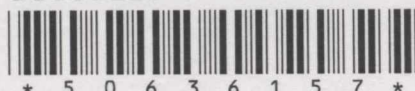


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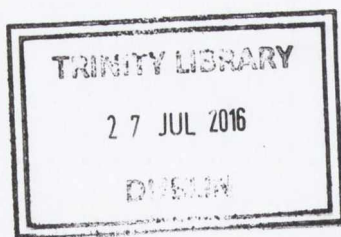
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Abstract: The role of brands as frames for engagement in meeting pro-social goals: a multi study investigation. Karen Hand (2015).

There is a crisis of trust in our world and this is compromising our ability to meet pro-social goals. Brands were originally conceived as signals of trust and can be an interesting lens to explore pro-social engagement. Theoretical analysis of four brand theories has demonstrated three potential challenges for brands in pro-social contexts. The three challenges are lack of alignment between donor and recipient stakeholders, power imbalances and the relative importance of the pro-social organization versus its pro-social goals. This thesis explores the role of brands and branding in pro-social contexts and aims to make a theoretical contribution to a pro-social theory of brands and to more general theories of branding. Pro-social brands are explored as frames (Lakoff, 1974) for social engagement, using mixed methods to investigate the research questions.

The first research study investigates how NGO decision-makers construct brands and branding using the Interpretative Phenomenological Analysis (IPA, Smith, 1996) method, and identifies four master-themes around brands and branding within NGOs. The second research study investigates charity donor decision-making and explores the different contributions of surface framing (charity communications) and deep framing (the world-views of the donors), using a laboratory experiment between subjects. The third research study investigates the dynamics of good will (as operationalized by kindness experienced and kindness intended) at multiple levels, using a naturalistic SMS-based pro-social experiment over six weeks. In addition it experimentally investigates the influence of relational framing (as operationalized by providing feedback of the previous weeks average results randomly to a third of the participants each week) on engagement with the pro-social initiative over time.

These three research studies have identified barriers to brands and branding and highlighted important potential aspects in pro-social contexts. The first study showed that cognitive complexity, identity conflicts, cultural legitimacy and system legitimacy were all potential barriers for brands and branding within NGO's. The

second study demonstrated the importance of efficacy and authenticity in building support for pro-social brands. The third study identified the importance of kindness experienced, individual traits, collective identity and societal fairness in intended kindness. It also showed the effect of sharing previous weeks results in sustaining engagement with a pro-social initiative.

This thesis proposes a new theoretical framework for brands and branding in pro-social contexts – Brand as Shared Sacrifice - which deals with the existing theoretical gaps and draws from the findings of the three research studies. This framework proposes that five elements would be necessary and sufficient to build brands that would engage stakeholder with pro-social goals over time. These five elements are moral agency, recipient wellbeing, collective efficacy, radical transparency and most fundamentally shared sacrifice. Future research can investigate this framework aspects using triangulated methods with pro-social organisations and initiatives.

Declaration

September 20th, 2015

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Finally and most importantly, I would like to thank the members of my family – Damien, Valerie, Steven, Sarah, Zoe and above all, Francis – for all their inspiration, love, guidance and incredible patience before, during and after this thesis. Without them, it would not have been possible.

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Chapter 1. Introduction, Theoretical Review and Research Design

Thesis Background

There is a crisis of trust in the world with people losing trust in governments, business, NGO's and the media. For pro-social organizations like NGO's, this crisis of trust has major implications where trust levels continue to erode and less than half the world's population agree that NGO's 'can be trusted to do what is right' (Edelman, 2012). At the same time, the for-profit world is trying to build alliances with the pro-social world in order to re-build trust in business. Brands were originally conceived as signals to build the trust in a given product's consumers and consequently build the value of the product's organization to its owners and investors (Aaker, D.A., 1991). This makes pro-social brands an interesting lens to explore in the context of eroding trust in pro-social organizations and goals.

The Structure of this Thesis

This specific focus of this thesis is to investigate the potential role for brands and branding as frames for engagement in meeting pro-social goals. This first chapter defines the pro-social sector and brands for the purposes of this thesis. It then outlines the theoretical and methodological approach of this thesis, reviews and critiques the relevant psychological theories, proposes a theoretical framework and research questions, and sets out the methodology and research studies. The second chapter reviews the broader literature debates that could inform the specific research questions. Each of the next three chapters explains, expands and discusses the findings and limitations of one of the three pieces of research. The final chapter discusses the findings, strengths and limitations of the three research studies, integrates the findings from the three studies with the research questions in relation to the literature. It then outlines the possible implications of these findings, in terms of

theory, practice and future research.

The Pro-Social Sector

The pro-social sector includes NGOs, charities, social enterprises, for-benefit corporations, voluntary movements and pro-social initiatives under-taken by business (such as Corporate Social Responsibility) or government. Pro-social organisations are altruistic in calling, focusing on what Putnam (2002) has called 'public-regarding purpose'. In aid and development NGOs have been defined by K. Martens (2002) as 'formal (professionalized) independent societal organizations whose primary aim is to promote common goals at the national or the international level' (Martens, K., 2002, p. 282). The United Nations (2003) has defined NGOs as non-profit private organizations that are initiated by people with a common interest. Teegan, Doh and Vachani (2004) have differentiated between Club NGOs, following Buchanan's (1965) club theory, which are organized groupings which seek to protect the collective interests of the group itself (for example labour unions, collective bargaining) and Social Purpose NGOs, which are organisations which seek to serve wider societal interests beyond the group itself.

Pro-social organisations can be hard to classify (Vakil, 1997) and can take the form of civil society organisations, voluntary movements, non-profits and charities. The activities performed by NGOs work across a spectrum from advocacy to service provision and many 'hybrid' NGOs deliver both (Teegan, Doh & Vachani, 2004). Official development assistance is estimated by the United Nations at \$126 billion (United Nations, 2013) and the World Bank (2007) has estimated that 15% of overseas aid is channeled through NGOs. Martens, B. (2005) argues that a critical role for NGOs is to mediate between the interests of multi-lateral agencies, governments, business, other NGOs and recipients as a response to the 'broken feedback loop' within the aid system, which means that donors' and recipients' needs can easily misalign. Slim (2002) has proposed that the authority and legitimacy of humanitarian NGOs is grounded in their societal function, as manifested both by the quality of their outputs and the quality of their relationships and processes.

In macro terms, the pro-social sector can be seen as a 'silver bullet' (Edwards & Hulme, 1996) potentially delivering value to the overall system, where trust levels in both government and business continue to decline (Edelman Trust Barometer, 2012). This system-gap has led business academics (Bird & Rowlands, 2003; Reisel & Sama, 2003; Teegan, Doh & Vachani, 2004) to highlight a potential role for NGOs as a key contributor to globalization, in terms of both global governance and value creation. Indeed Porter and Kramer (2011) have identified a critical role for NGOs along with business and government to reinvent the paradigm of capitalism around 'shared value' for society. Following this thinking, strategic business consultants (Edelman, 2014; Browne & Nuttall, 2013) have recommended that the business sector should 'leverage' the trustworthiness of the pro-social sector by forging alliances and partnerships around longer-term societal initiatives to further corporate social responsibility or environmental sustainability.

Meanwhile, in micro terms, the value of the pro-social sector is being challenged and is under debate. The Edelman Trust Barometer (2012) demonstrated that global citizens trust in the pro-social sector, operationalized as 'trust to do the right thing' is only 50%. The trust level is higher than the other sectors - for example government, business and the media - but in itself the fact that only half the general population trust NGOs to 'do the right thing' would seem relatively low for a sector, tasked with promoting 'common goals' (K. Martens, 2002). In aid and development, NGOs have been specifically criticized for ineffectiveness, post-colonialism and self-righteousness (Collier, 2007; Easterly, 2006; Moyo, 2009), leading some commentators (e.g Edwards, Hulme & Wallace, 1999; Pearce, 2000; Slim 2002) to debate the role and value of NGOs within global development.

Werker and Ahmed (2008) have argued that the lack of a market –discipline within NGO's or pro-social contexts means that there is a danger of inefficiency and non-accountability. As they expand on this danger: 'Nongovernmental organizations seem to represent the best of private citizens responding to global inequalities. But behind the characteristics inherent to an NGO model of development are lurking several challenges: too many actors, too many chiefs and too much mission' (Werker & Ahmed, 2008, p.87).

The Continuum from For-Profit to Pro-Social Contexts

In simple terms, the purposes of for-profit and pro-social organizations are different and this is reflected in their legal structure and reporting requirements. Hansmann's (1980) seminal paper on the role of non-profit enterprise has stated that what legally defines a non-profit organization is the fact that it cannot redistribute any financial surplus to the owners or patrons of that organization. From a technical point of view, Hansmann (1980) has maintained that the underlying rationale for non-profit organizations is market failure, or more specifically 'contract-failure'. He has explained contract failure as arising where 'occasionally, due either to the circumstances of the circumstances in which the product is purchased and consumed or to the nature of the product itself, consumers may be incapable of accurately evaluating the goods promised or delivered' (Hansmann, 1980, p. 843).

However, these legal and structural differences do not deny the reality that business can do social good through the provision of jobs and economic growth and that non-profits can boost the economy through service provision and purchase. Moreover, recently the process and outputs of the two sectors has been blurring more with the advance of private-public partnerships, corporate social responsibility and social entrepreneurship. These changes are supported by arguments around 'shared value' from management theorists (Porter & Kramer, 2011; Teegan, Doh & Vachani, 2004) and calls for 'common purpose' from social activists (Kahane, 2010; Crompton, 2010). Both groups claim that there could be benefits for business and society if the two sectors could collaborate and tackle the economic and societal challenges of our time.

However, despite some blurring of purpose between the two sectors, there is still a continuum of difference between the underlying psychological contracts (Rousseau, 1995), which at its simplest can be described as the potential trade-off in individual or collective motivation between 'doing well' and 'doing good' (Gardner, Csikszentmihalyi & Damon, 2001). This trade-off has been depicted by Jones, Felps and Bigley (2007) as a difference in stakeholder culture, which balances priority on

self-interest versus others-interest. This balance in stakeholder culture can vary from the extreme of private goods and profit-seeking pragmatism (for example Financial Companies) to the extreme of public goods and altruism (for example NGO's).

At a deeper level, this continuum also represents a different basis for exchange and involvement. As Sandel (2012) has explained, the basis for exchange in societal projects is shared sacrifice, in contrast with the basis of exchange in economic projects as shared gain. Behavioural economics experiments (Gneezy & Rustichini, 2000) have demonstrated that individual financial incentives can actually 'crowd out' engagement if societal context is ignored. For example people were more willing to voluntarily allow a nuclear reactor near their home, than if they were 'paid off' to accept it. These critical differences are also reflected across the stakeholder culture continuum in terms of the type of capital that is needed and sustained. At the self-focused end of the spectrum, it is likely that there will be a higher reliance on financial capital and less on cultural, social and moral capital. At the other-focused end of the spectrum, there will be a greater reliance on moral capital than on other forms of capital. This has implications for how value is perceived and created along the continuum. For an example of how this continuum of psychological contracts from for-profit to pro-social contexts might work, see the schematic below (Figure 1):

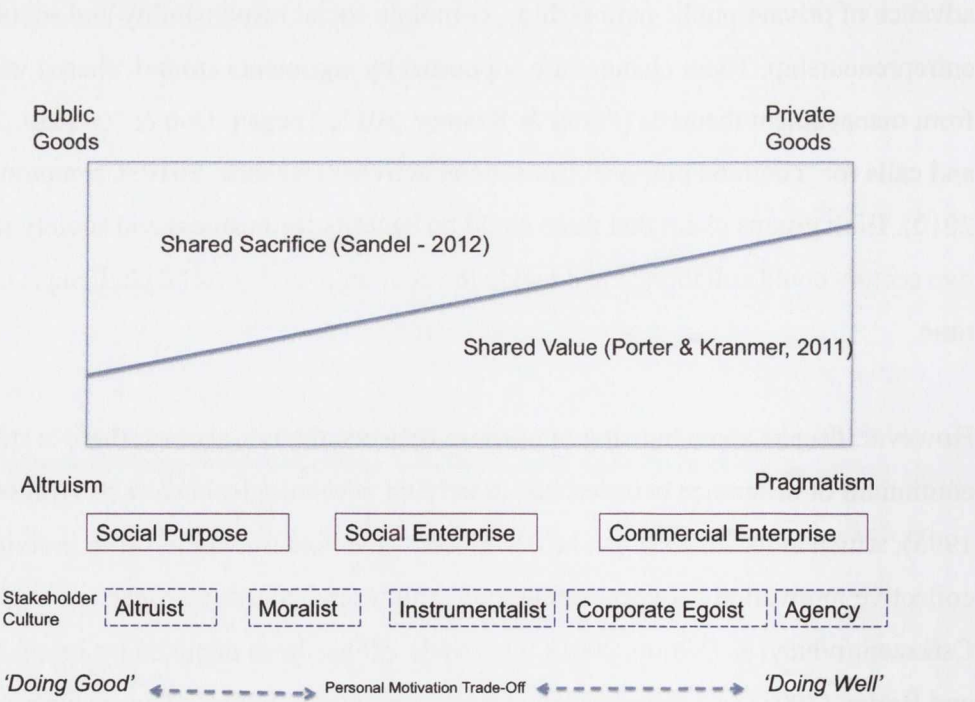


Figure 1 - Continuum from For-Profit to Pro-Social Contexts

Introducing Brands

Brands are relational constructs that signal the underlying value of the product or organization to its stakeholders (Aaker, 1996, 1991; Doyle, 1994). The concept of branding was initially introduced to connote the origins of cattle to build reputation for the seller and trust for the buyer. Brands were then applied by manufactured goods, as a 'short-hand' for the authenticity or 'promise' of that product, and to help consumers make choices between competitive products (Furnham, 2014). The usage then expanded to include services like finance or travel and in recent years has been expanded further to include institutions, political parties, celebrities and even nations (Anholt, 2007; Fan, 2006; Ollins, 2002). Over the same time, the models and frameworks for branding have moved from a dyadic relational construct between the producer and consumer of a single good to a symbolic interactionist construct between multiple internal and external stakeholders united around a degree of shared understanding, expectations and experiences of the brand in question (Balmer, 2001; Dutton and Duckerich, 1991; Hatch and Schutz, 2009; Holt, 2002; Jones, 2005; Norman and Ramirez, 1993). As expressed by Hatch and Schultz (2009):

'Brands no longer represent only the products and services that they adorn, or the companies that stand behind them. They are coming to represent the vision and all the interests that unite a disparate group of stakeholders in the pursuit of common cause, whether that cause be – for example, Novo Nordisk leading the fight against diabetes, Unilever PLC's efforts to promote vitality, or General Electric Co.'s (GE's) "ecomagination" to find solutions to the world's toughest problems (e.g., affordable and accessible water desalinization technology),' (2009, p.118).

Balmer (2001) has argued that there remains a 'conceptual fog' within the academic literature on the subject of brands and branding, partly due to (i) the level at which branding is explored (consumer relationships, communications, investor perceptions, employee motivation) (ii) the academic discipline and sub-discipline concerned (business, politics, law, economics, psychology) and (iii) the underlying 'world-view' of the academics in question. This clash of world-views in particular transforms the

debate from a 'conceptual fog' to a 'conceptual mine-field', especially as it relates to brands' underlying relationship with reality: on one side, theorists like Susan Fournier (1998) or Douglas Holt (2002, 2011) maintain that 'brands' are a negotiated dialectic construct in which individuals (in their dual role as citizen-artist), are free to 'negotiate' a shared reality and on the other side, critics maintain that brands are themselves a 'placebo' for reality (Baudrillard, 1994) and substitute for relationships. Klein (2000) has noted that people are looking to brands for poetry and for spirituality instead of seeking these things from communities and from each other.

This thesis uses brands as a lens to look at the pro-social sector and how brands can be frames for engagement to deliver value. The function of brands is to align the value, expectations and experiences of stakeholders (Aaker 1991; Aaker, 1996; Doyle 1994; Jones, 2005). Brands and branding have played an increasingly explicit role in NGOs in recent years (MacLachlan, Carr & McAuliffe, 2010). At the same time, despite broad agreement that trust and reputation have always been fundamental to the existence of non-profits (Burt, 2012; Burt & Dunham, 2009; Hansmann, 1980), the sector has been slow to accept the 'formal' language and practices of marketing, brands and branding (Hankinson, 2001; Sargeant, 1999; Stride & Lee, 2007). When Laidler-Kylander and Stenzel (2013) conducted large-scale interviews with non-profit representatives, they found that around half of them expressed 'visceral' ambivalence around the value of brands and branding for the sector. Critics of branding in the NGO world (for example Edwards, 1997; Levine, 2009) have argued that 'brands' are fundamentally self-promoting, distracting individual NGOs from the harmonized, collective objectives of aid and development.

Branding in Pro-Social Sector versus other Sectors

In the pro-social sector, there are three other aspects, which further complicate the debate on branding. The first concerns the relationships between stakeholders, where unlike for-profit organisations, there is an *indirect* relationship between the people who 'pay' for the services and the people who 'consume' them. This physical, geographical and chronological distance has the potential to create psychological distance between 'donor' and 'recipient' (Laidler- Kylander, Quelch and Simonin,

2007). If we view ‘brand’ as either a simple psychological contract (Rousseau, 1995) or a more complex nexus of psychological contracts, there is the possibility that the psychological contract cannot ‘self-regulate’ and needs to be mediated by governments, the media and the pro-social organisation itself in order to ensure a healthy balance between expectation and experience. This key difference in how expectations and experiences are aligned across the ‘for profit’ value chain versus the pro-social value chain is depicted in the schematic below (See Figure 1 below):



Figure 1 - 'Psychological Contracts' Differ for For-Profit Brands versus Pro-Social Brands

The second aspect of pro-social brands, which is potentially different from for-profits lies in how pro-social organisations construct their organizational identity and to what extent it is respecting and resolving the cultural tension between ‘managerialism’ and ‘volunteerism’ that can manifest in the cultures of contemporary NGOs, non-profits and charities (Kreutzer & Jäger, 2013). If branding is simply seen as a tool of business and ‘markets’ aggressively applied to the pro-social sector, it is unlikely to perform a role of symbolic unity between internal and external stakeholders. Empirical work on innovation in the non-profit sector (for example Jaskte, 2004) has shown that non-

profit organizational cultures can be resistant to change, especially if it seems to be 'imposed' from 'outside' or 'above' rather than 'seeded', adapted and grown from 'within'. As Hankinson (2001) identified in her paper on 'brand –orientation', there is a risk that a 'gung ho' approach to branding may fail to appreciate the importance of 'taking the culture with you' when trying to introduce branding to a non-profit organization.

The third aspect of pro-social organisations that differs from for-profit organisations is the relative importance of the *organisation itself* versus other stakeholders in terms of the brand. This can create confusion and rejection of investment in brand development. In a broad sense Freeman (1984) has specified that a stakeholder approach differs from a stock holder approach, in that it puts priority on other stakeholders beyond the financial markets. However Jones, Felps and Bigley (2007) have explained that the ethical balance between different stakeholder groups is different, depending on the underlying purpose of different sectors. For example in an corporate stakeholder culture, broader society would be a minority stakeholder whereas in a pro-social stakeholder culture, broader society's needs as expressed by moralism or altruism, would carry greater weight as a stakeholder.

It is possible that these sectoral differences have underpinned the arguments for a separate approach to branding for the pro-social sector versus the for-profit sector. Hankinson (2001) has argued that branding is a management competence and practice that needs to be cultivated within the non-profit sector. Stride and Lee (2007) have proposed that charity branding needs to be conceptualized through a lens of 'values' that links the brand to the inherent vocation and ideals of the charity in question. Laidler-Kylander and Stenzel (2013) have proposed a non-profit brand theory which connects the brand to the 'theory of change' that guides and underlies the specific NGO, nonprofit or charity.

Overall Research questions

There is a need to further empirically explore brands and branding and how they actually manifest in the decision-making and behaviour of pro-social organisations internally and with the general public externally. In addition, there is an opportunity

to theoretically align theories of branding for the pro-social sector with the more general theories of branding – specifically do brands and branding in pro-social contexts *differ in kind or in degree* from brands and branding in other sectors.

Ontology, Epistemology, Axiology, Methodology

The metaphysical foundations of this thesis are based in the philosophical tradition of pragmatism, following in the wake of James, (1995; 1907 original), Peirce (1878) and Dewey (1948; 1920 original). Reality is understood as the interaction of individuals and their experiences and environments. Part of this reality is understood to have social dimensions (Mead, 1934; Goffman, 1959) and incorporate inter-subjective evaluations and negotiations of meaning. This ontological position is appropriate for investigating brands and branding in pro-social contexts, where brands operate at the intersection between experiences and expectations and pro-social organisations operate at the intersection between different stakeholders interests and intentions. Epistemologically, this thesis adopts an empirical approach to knowledge generation, combining a focus on related experience and the scientific experimental method to yield insight. This epistemological position is chosen because brands straddle past experiences and future intentions, personal meaning and social meaning (Fournier, 1998; Holt, 2002; Muniz & O’Guinn, 2001).

Axiologically, this thesis assumes that values are situational, relative and inter-subjective, as opposed to the realist or idealist view that values are absolute and eternal. This stance is chosen because both brands and pro-social organisations are relational concepts, which require the alignment of experience and expectations, personal meaning and social meaning. Following the ‘falling- tree- in- a- forest’ thought experiment (Fosset, 1754), if a well-known charity like United Way betrays the trust of its donors and violates its responsibility to beneficiaries, it could be argued that whereas it is still technically the *United Way organization*, it is no longer effectively the *United Way brand* from stakeholders’ perspectives. As Fournier (1998) succinctly expresses it – ‘people don’t choose brands, they choose lives’ – and once a pro-social organisation violates personal needs and social values to the extent they are relevant, it could be concluded that it no longer effectively represents or delivers the ‘brand’ it previously promised.

This thesis uses mixed methods to empirically investigate the role of brands and branding within the pro-social sector and to make some theoretical contribution to pro-social branding and theories of branding in general. Mixed methods research is a research paradigm, which legitimates the use of multiple approaches in answering research questions (Tashakkori & Teddlie, 1998) and follows the pragmatic method of James (1907), Peirce (1878) and Dewey (1920). Mixed methods is an expansive and creative form of research, which places responsibility on the researcher to put the research question before the research methods and seek to find the common ground and integrated learning from the findings. As outlined by Johnson and Onwuegbuzie (2004), 'the logic of inquiry includes the use of induction (or discovery of patterns), deduction (testing of theories and hypotheses) and abduction (uncovering and relying on the best set of explanations for understanding one's results' (Johnson & Onwuegbuzie, 2004, p.17).

A Review and Critique of Psychological Theories of Branding

This section outlines the key psychological theories within the literature as they relate to brands and branding. The four theories below have their roots in different psychological perspectives. Three of the theories (Aaker, 1997; Fournier, 1998; Hatch & Schultz, 2008) are general and implicitly relevant to all sectors including the non-profit or charity sector. One of the theories (Stride, 2006) is exclusively focused on the charity sector and proposes a key difference within this sector versus the private sector. Each of these theories is outlined and critiqued from a psychological perspective in general terms and also in specific terms of the pro-social sector.

Theory of Brand as Personality (Aaker, 1997)

In 1997 Jennifer Aaker formally proposed the brand personality construct and developed a scale to measure this across product categories. Brand personality had been informally viewed and used within consumer research practitioners for decades as a central driver of consumer preference and usage, (Biel, 1993), a key differentiator in a product category (Halliday, 1996) and a common currency that could be used to

market a brand across different cultures (Plummer, 1985). The exploration of a brand personality construct was anchored in the qualitative observation that people often imbued brands with human personality traits, which can be termed *animism* (for example Gilmore, 1919), together with the successful body of psychological theory and empirical work into the 'Big Five' human personality structure (for example Norman, 1963; Tupes & Christal, 1958).

Aaker (1997) identified 1154 personality traits using existing psychological and consumer research measures and surveyed a 631 sample of the U.S. general population on 37 household brands. These brands included three types of product category (as identified by Ratchford, 1987): *symbolic* (jeans, cosmetics and fragrance), *utilitarian* (computers, electronics and appliances) and both *symbolic* and *utilitarian* (automobiles, beverages and athletic shoes). The results of an exploratory principal components factor analysis suggested that people perceive brands as having five distinct personality dimensions: Sincerity, Excitement, Competence, Sophistication and Ruggedness. Factor analyses established the robustness of these dimensions and high levels of reliability were established through test-retest correlations and Cronbach alphas. A separate confirmatory factor analyses provided additional support for the reliability. Overall this research demonstrated that the framework of brand personality dimensions, represented by the 42-item Brand Personality Scale was reliable, valid and generalisable across this selection of product categories.

Aaker's brand personality theory (1997) proposed that brand personality is the outcome of tangible product attributes, individual product or service experiences and individual and collective responses to a given organization's communications or advertising. Subsequent empirical research has built on the brand personality framework and applied it to various consumer product contexts. Aaker and colleagues have also investigated aspects of the brand personality framework within non-profit contexts. Aaker, Vohs and Molignier (2010) examined the relative importance of Sincerity and Competence within both for-profit and non-profit suppliers of a service. Aaker, Fournier and Brasel (2004) examined the consequences of brand transgressions (when a simulated internet company does not deliver on product and

service expectations) for brands created through Sincerity versus brands created through Excitement.

The theory of Brand as Personality (Aaker, 1997) can be critiqued on the following grounds. First of all the fact that people can project human qualities onto a product brand does not mean that they actually see a brand as equivalent to a human being. Qualitative consumer research (for example Ahuvia, 1993) has found that people can be hesitant in using human personality traits to describe their relationship with inanimate products. In addition, Yoon, Gutches, Feinberg and Polk ((2006) conducted a functional magnetic resonance image study into the neural correlates of brand and person judgments and found that these two types of semantic judgments were not processed similarly. Comparisons of neural correlates of product versus human descriptor judgments indicated greater activation in the medial prefrontal cortex regions for persons; for products, activation was greater in the left inferior prefrontal cortex, an area known to be involved in object processing.

A second key critique of Brand as Personality (Aaker, 1997) lies in the fact that whereas brand personality may reflect an aspect of the 'psychological contract' (Rousseau, 1995) between a given person and a product or brand, it may not be the sole purpose or key dimension of 'value' within that contract. This is partially supported by the weak evidence that Aaker (1997) found in her study for self-congruity effects (both actual and ideal) in matching personality between brand and consumer at the aggregate level (i.e. across all personality traits and across all product categories). Elliot and Yannopoulou (2007) investigated the different psycho-social components of trust across functional and symbolic brands in an exploratory grounded theory study and found that functional trust is more rooted in product dependability whereas symbolic trust is more grounded in a sense of culturally rooted faith. This study highlights the difficulty in making generalized assumptions about the relationships between brand personality frameworks and human personality frameworks.

The third critique of Brand as Personality (Aaker, 1997) lies in the inability to translate the general framework to the charity or non-profit sector. As explained earlier, the non-profit sector was not included in the original design of the framework and Austin, Siguaw and Mattila (2003) have argued that it is unclear on a broader

level if the framework can extend to all contexts and sectors. Research by Saxton (2002) identified the key characteristics of charities as accountability and tradition, which sat outside the product/personality dichotomy suggested by Aaker (1997). A quantitative study was conducted by Sargeant, Ford and Hudson (2008) exploring the relevance of a brand personality framework to the non-profit sector, applying 64 personality traits to nine charities with a general population sample of 1,225. It was found that a number of personality traits were exhibited equally by the nine charities in the study. The nine charities were practically indistinguishable on 32 of the 64 traits. The subsequent factor analysis suggested that these common or shared characteristics reflect the voluntary, benevolent nature of non-profits and the role that they play in attempting to instigate (social) change. This third critique is particularly pertinent in light of the subject matter of this thesis: the role of brands and branding as frames for engagement in pro-social contexts.

Theory of Brand as Relationship (Fournier, 1998)

In 1998 Susan Fournier formally introduced relationship theory to brand research and demonstrated its potential usefulness for understanding the role that brands can have in the lives of consumers. Fournier (1998) argued for the validity of the relationship proposition in a consumer-brand context, by providing empirical support of the phenomenological significance of consumer-brand bonds (Belk, 1988; Rook, 1985) and by proposing the legitimacy of 'brand' as a relationship partner. Three in-depth case studies provided evidence for the concept of brand relationship quality and Fournier (1998) used consumer stories to derive six facets of brand relationship quality. A strong brand relationship could be characterized by love or passion, a connection between the brand and self, a high degree of interdependence, a high level of commitment, intimacy in the relationship and overall positive evaluation of brand partner quality.

Ostergaard (2002) has characterized the Brand as Relationship theory (Fournier, 1998) as a modern classic. Bengtsson (2003) has argued that the application of relationship thinking to brands and consumers has taken brand *anthromorphisation* - where a brand is imbued with human qualities by people - to its logical conclusion.

Subsequent studies (Ji, 2002; Kates, 2000; Olsen, 1999) have investigated and built on the theory of brand as relationship with diverse audiences like children, gay men and women in mid-life. The theory has also been integrated by Fournier (1998) in a complementary manner to the theoretical framework of brand as personality (Aaker, 1997) and some empirical studies have discussed findings in light of both perspectives (Aaker, Fournier & Brasel, 2004; Aaker, Vohs & Moligner, 2010)

Nonetheless, the theory of Brand as Relationship (Fournier, 1998) can be critiqued on the following grounds. Firstly, as outlined by Bengtsson (2003) this theory is based on the foundational assumption that it is possible for a consumer to have an active relationship with a brand. The validity of this assumption relies on (i) what Fournier defines as a relationship, (ii) what other academics define as a relationship and (iii) the actual experiences and language consumers ascribe to brands. Fournier (1998) has proposed that it is possible for consumers to have pure relationships with brands insofar as she argued that consumers seek and maintain those brand relationships that add meaning to their lives. However according to Giddens (1991, p.3) 'a pure relationship cannot exist without substantial elements of reciprocity' and Bengtsson (2002) has questioned whether an inanimate standardized product or a faceless corporation can really have a reciprocal relationship with human beings. In qualitative research, Ahuvia (1993) found that consumers struggled with the appropriateness of applying relational discourse to brands like Haagen Daaz ice cream, when comparing this 'brand relationship' to human relationships with family and friends.

A second critique of Brand as Relationship theory (Fournier, 1998), in a similar vein to Brand as Personality theory (Aaker, 1997), lies in the argument that whereas there may be some aspect of relationship within the underlying 'psychological contract' (Rousseau, 1995) with a given brand, a relationship with a brand is not the sole purpose of the consumer in question. As Baudrillard (1968, 1970, 1972) has set forth, there are many functional or symbolic dimensions that can be the underlying basis for exchange within consumer decision-making and these may or may not be based around relationships. In considering the purpose of human relationships, Giddens (1991) has proposed that 'a pure relationship is not anchored in external conditions of social or economic life but it is sought because of the benefits the relationship can bring to the partners involved' (Giddens, 1991, p. 89-90). Bengtsson (2003) has

extended this critique of the relationship metaphor when applied to a consumer-brand context by questioning the relevance of concepts like love, commitment and intimacy in these human-object contexts. Following Belk (1988), he has proposed that relationships with objects are never two-way (person –thing) but always three-way (person-thing-person) and recommends explicitly including a social dimension to brand relationships, which reflects a potential role for brands as strengtheners of human relationships (Bengtsson, 2003).

A third critique of the Brand as Relationship (Fournier, 1998) lies in the application to the non-profit or charity sector. As discussed in relation to personality, the research of Sargeant, Ford and Hudson (2008) found charity supporters appear to choose charities at least in part on the basis of common or shared characteristics reflecting the voluntary benevolent nature of non-profits and their role in attempting social change. This would argue that whatever relationship exists between a given consumer and a given charity is at least partially based on a relationship with the overall charity sector rather than being purely based on a relationship with that specific charity brand. Extending the line of thinking above, following Belk (1988) it might be argued that relationships with charities might have at least five players (person – charity-recipient- other people – all charities). This line of argument would also follow Parfit's (1984) proposal around altruistic motivations being influenced by an ideal version of self as well as an ideal version of society. Markus and Conner's (2013) depiction of culture clashes around the ideas of 'independent' and 'interdependent' self might also need to be factored into understandings of relationship within pro-social contexts.

Theory of Brand as Values (Stride, 2006)

In 2006, Helen Stride proposed the need for separate theory for brands and branding within charities and non-profit organizations. Stride (2006) proposed the need for separate theory for the charity sector on the grounds of concerns about the over-commercialisation of the sector (Richie et al., 1998) and inappropriate use of branding techniques developed for commercial contexts in non-profit contexts (Sternberg, 1998). Following Hudson (1995) and Aiken (2005), Stride (2006) argued that values

are fundamental to the existence of the charity sector and went further to say that it was not the charity sector's dependence on values *per se* that distinguished it from the corporate sector, it was the non-negotiability of its values (Stride, 2001). The metaphor of brand as 'lens', a means of magnifying internal values to the outside world was proposed as a means for the charity sector to brand itself appropriately. This was contrasted with two other metaphors for branding which are more relevant to commercial contexts: the metaphor of brand as 'mirror' in which the brand seeks to reflect the consumers' functional and symbolic desires and metaphor of brand as 'lamp' in which brand represents the shared goals and values of the organization with its stakeholders.

Stride's (2006) theory of Branding as Values was based on exploratory qualitative research with key informants – senior non-profit directors and consultants. Recently, Stride and Higgs' (2013) research within two charities has demonstrated the importance of organizational values to staff commitment in the charity sector. However the alignment of employee values and organizational values only affects organizational commitment in one of the two charities. Other non-profit management literature (Hankinson, 2001; Laidler- Kylander & Stenzel, 2013) has also supported the need for a different approach to brands and branding in the charity sector. Hankinson (2010) has proposed that 'branding' is a management orientation that has not yet been fully integrated into the charity sector. Laidler- Kylander and Stenzel (2013) have argued that the non-profit sector differs from the commercial sector in four key ways - importance of social mission, need for participation, consensus versus control and need for partnerships - and that successful non-profit branding need to reflect this in terms of what and how they brand themselves.

The Brand as Values (Stride, 2006) theory can be critiqued on the following grounds. First, accepting that values are an important aspect of the charity sector still begs the question as to whether they are the only component of brands and branding in the charity sector. Within this critique, it is also not clear to what extent values should be operationalised as rhetoric versus reality (Hogget, 2006). The potential demotivation risks of 'pseudo-communication' and 'broken promises' have been investigated (Boggs, Carr, Fletcher & Clarke, 2005) within organizational contexts. As Slim (2002) warns in the context of aid and development, 'the precise nature of their

(NGO) legitimacy will change depending on which mode of voice they are using. But they will lose all legitimacy if they are found to be masquerading — a sort of ventriloquist to the poor and oppressed’ (Slim, 2002, p.6).

Second it is unclear as to which stakeholder group(s) apart from the organization itself will verify or validate whether the organization is delivering against its stated social mission, or as Chambers (1997) succinctly expressed the issue in the aid and development context - ‘whose reality counts?’ In the case of beneficiaries, the question has legitimately been asked as to whether ‘downward’ accountability is merely a development sector myth, which Walsh (2014) has concluded is ‘improbable’ in reality. Aaker, Vohs and Moligner (2010) investigated the perceived differences between commercial and non-profit brands and found that commercial brands were stereotypically perceived as ‘competent’ and non-profit brands as ‘warm’ but less competent. However endorsement from third parties on non-profit competence had a strong effect on perceived competence.

A third critique lies in the lack of overarching frameworks to explain exactly why and how a non-profit brand is different from a commercial brand. It is undoubtedly true that the assumptions of moral organizations and ‘market’ organizations are likely to be different (Sandel, 2012) and other researchers (Anheier, 2000) have also argued that non-profit organizations need different theories and practice from commercial organizations because they are fundamentally different. For example Lohmann (1989) has argued that drawing parallels between for-profit and non-profit sectors is as inappropriate as defining a lettuce as ‘non-animal’. Nevertheless some other researchers have tried to explore whether the commercial and non-profit sectors might benefit from some shared perspectives and shared goals (Porter & Kramer, 2011; Teegan, Doh & Vachani, 2004). It is also possible, following Jones, Felps and Bigley (2007), that there may be a spectrum of stakeholder cultures from self-focused (for example finance) to other-focused (for example charity) sectors which could help explain the similarities and differences between sectors. An integrated theory of branding could acknowledge this and work across sectors rather than requiring a sector-specific theory.

Theory of Brand as Vision- Culture- Identity Alignment (Hatch & Schultz, 2009)

In 2009, Mary Jo Hatch and Majken Schultz proposed that creating a strong brand is the result of aligning organizational identity with organizational vision, culture and stakeholder imagery. This theory was built on the previous Hatch & Schultz (2002) theory around the dynamics of organizational identity, which was rooted in George Herbert Mead's (1934) theory of social identity. This theory of brands and branding holds to a broad acceptance of what Fine (1993) has described as Blumer's (1969, p.2) classic three premises of symbolic interaction: that we know things by their meanings, that meanings are created through social interaction and that the meanings of things change through social interaction.

Hatch and Schultz (2002) proposed that internal organizational culture, organizational identity and external stakeholder images had an interdependent relationship, which was manifested in four separate processes. These processes were (i) *mirroring* where identity is informed by the images of others, (ii) *reflecting* where organizational identity has an impact on organizational culture, (iii) *expressing* where culture informs identity claims and (iv) *impressing* where identity informs the imagery of external stakeholders. In 2009, Hatch and Schultz integrated the perspective of Collins and Porras (1994) around the importance of company vision and proposed a dynamic theory of branding based on the continual alignment of vision, culture and identity. See Figure 2 below:

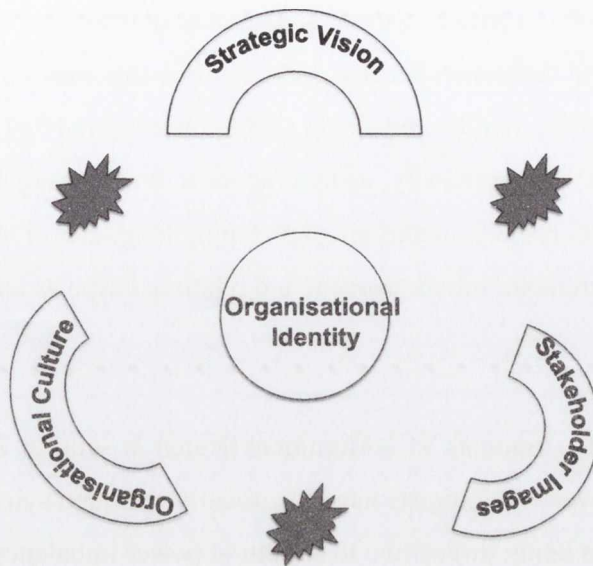


Figure 2 – Brands as Vision-Culture- Identity Alignment (Hatch & Schultz, 2009).

Importantly, the original Hatch and Schultz (2002) dynamic theory of organizational identity proposed that if the system is misaligned, different types of dysfunction could arise. If organizational culture is too powerful and out of sync with external stakeholder images, the organization can become *narcissistic*. However if the organization is too focused on the needs of external stakeholders at the expense of internal culture, the organizational identity can become *hyper-adaptive*. In the augmented dynamic theory of brand (Hatch & Schultz, 2009), it is also possible the system could be misaligned in an imbalance of corporate vision, which might lead to a form of *delusional* dysfunction within the brand. Hatch and Schultz (2008, 2009) have used case studies from organizations like British Airways, Lego and Novo Nordisk to demonstrate how listening and responding to internal and external stakeholders and balancing with vision can build a coherent and strong brand.

Nevertheless, the Brand as Vision-Culture-Identity (VCI) Alignment (Hatch & Schultz, 2009) can also be critiqued on the following grounds. The first critique lies is largely methodological and lies in the difficulty in isolating and measuring all the

inter-related elements of vision, culture and identity when the theory proposes that all these aspects are both interdependent and fluid. This follows general critiques (for example da Laguna, 1946) of Mead's (1934) social identity theory as vague and ambivalent. There is also the possibility that different time lags may be present in the different processes at work. Schultz and Hatch (2005) have argued that there is a need for research to embrace this complexity, using practice to build emergent theory, building multi-functional research teams and developing longitudinal research to over-come these measurement, interdependent and relational aspects and challenges of this theory.

The second critique of the brand as VCI Alignment (Hatch & Schultz, 2009) lies in the potential role of power. Sociologists have historically critiqued symbolic interactionist theories as being insensitive to structural power imbalances (Fine, 1998) and power has been mentioned by Hatch and Schultz (2002) as an area for future research within this framework. It is likely that power imbalances may mean that some stakeholders are 'more equal than others' and that this will have consequences for the process of 'alignment' and the definition of 'equilibrium'. It may be useful to adopt understanding around what Jones, Felps & Bigley (2007) have called 'stakeholder culture' to factor in the *Realpolitik* and social dominance (Sidanius & Pratto, 1999) dynamics that may contribute to organisational meaning-making and decision-making.

The third critique builds on the other two critiques when the Hatch and Schultz (2009) symbolic interactionist theory of branding is applied to a non-profit or pro-social context. In terms of stakeholders, non-profit organizations tend to work as conduits between a group of donors and a group of beneficiaries and this has consequences for Hatch and Schultz (2009) theory as it might be applied to these organizations. On a complexity level, it means that there is a further difficulty in measuring the difference expectations and experiences of those who 'pay' for the service versus those who 'receive' the service. This complexity could be further compounded by possible chronological, geographical and psychological distance between these two groups of people (See Figure 3). In terms of power dynamics, there is also a potential danger of lack of alignment between well-intentioned (and well-off) donors and less powerful recipients. This critique could exacerbate some of the broader critiques of the

‘charity’ and ‘development’ paradigms as donor - serving and recipient-disempowering (Easterly, 2006; Illich, 1968; McKnight, 1989; Moyo, 2009).

Overall Theoretical Opportunity for This Thesis

This thesis investigates four leading theories of brands and critiques their relevance to pro-social contexts. Three of the theories are general theories of brand – brand as personality (Aaker, J.L., 1997), brand as relationship (Fournier, 1998) and brand as vision-culture-identity alignment (Hatch & Schultz, 2009) and one of the theories is specific to the pro-social or charity sector – brand as values (Stride, 2006). All of these theories could be applied to the pro-social context to some extent but they are all deficient in fully explaining the role of brands and branding in pro-social contexts.

There are three main reasons why these theories cannot and do not fully explain how brands can work and should work in pro-social contexts. All these reasons are linked to the fundamental differences between for –profit organizations and pro-social organizations and the basis for and dynamics between the psychological contracts of the stakeholders in each case.

The first issue is the potential lack of alignment between donor expectations and recipient experiences in pro-social contexts. This differs from the for-profit context where expectations and experiences of each stakeholder are easier to align. All four theories of branding are implicitly based on an assumption that perceptions and reality are inherently linked and the system of meanings and experiences will self-regulate. In the case of Hatch and Schultz (2009) the theory is explicit about the dynamic, self-regulating nature of alignment between culture, vision and identity. In all cases there is an assumption that the reality and perception of all stakeholder groups will necessarily be linked and inter-connected. However, the separation of donors and recipient within pro-social contexts means that realities and perception of different stakeholders can easily be disconnected and non-aligned. For an example of how this misalignment between stakeholders can occur in pro-social contexts, see the schematic below (Figure 3):



Figure 3 - 'Psychological Contracts' differ between For-Profit and Pro-Social Brands

The second issue is the power imbalance between the different stakeholder types in pro-social contexts versus for-profit contexts. In a pro-social context, the moral power lies with the inherent worthiness of the recipient but quite often the financial, social and political power lies with the donors, the pro-social organization itself and other vested interests. All four of these theories leave the possibility that the recipient's voice can be hijacked and misappropriated by other more powerful voices. This loophole can facilitate a violation of the basis of trust in pro-social contexts. It is possible that Stride (2006) implicitly acknowledges this potential for moral hazard in her proposal that values must be central to pro-social brands. However, in the pro-social space, it is too easy for the rhetoric of values to be divorced from the reality of actions and outcomes and it would be important for a pro-social theory of brand to actively acknowledge and guard against this hazard.

The third issue with these current theories is the relative importance of pro-social organizations versus their pro-social goals. Theories of branding are linked with theories of ownership in the capitalist system and most of these theories implicitly

assume that the value of the non-profit brand will be 'owned' primarily by the non-profit organization and its stockholders. However, following Sandel (2012), the non-profit sector is not based on market assumptions, it is based on moral assumptions and values. Stride (2006) has part-acknowledged this by making values central to her charity brand theory, but all these theories need to go further and spell out the relative importance of pro-social organizations versus the pro-social goals they serve. In a public sector context Hogget (2006) has clearly stated that one of the major differentiators of public versus private sectors is that the public sector organisation's own survival is less important than the survival of its values *per se*.

These three theoretical issues highlight an important theoretical gap for this thesis to explore. These are very complex issues and it is likely that the research findings will need to be discussed in the light of broader literature from within psychology and across economics, ethics and political science. This broader literature review is included in Chapter 2.

Research Questions

This thesis aims to investigate the following four research questions:

1. What is the function of brands and branding in pro-social contexts?
2. How should brands and branding in pro-social organizations be understood and applied to *align* internal and external stakeholders?
3. Do brands and branding in pro-social contexts differ in kind or in degree from brands and branding in general?
4. How can understanding the role of brands and branding in pro-social contexts contribute to general theories of brands and branding?

Proposed Operational Definition of Branding

Brands are summary judgments of what a given product or organization delivers, how it delivers that and why this is valuable. These summary judgments are made by individual stakeholders and can include direct experience of the product or service,

along with specific and general expectations of that product (Keller, 2003).

Stakeholder groups in commercial contexts can include consumers, customers, collaborators, competitors, employees, sector experts, the media, government and public opinion. In pro-social contexts, stakeholders can include recipients, funders, donors, governments, intergovernmental bodies, private foundations, media and the global public. These summary judgments can have conscious and unconscious dimensions and they can have a social component in that they are influenced by others' experiences and expectations. This social component can work within each stakeholder group and between stakeholder groups and interact with broader societal culture (Schein, 1984).

In psychological terms, brands and branding share common ground with frames and framing. Frames are constructs or 'maps' that have been investigated by cognitive and social psychologists (Bateson, 1954; Goffman, 1974; Lakoff, 1974; Minsky, 1974) in terms of how we 'make sense' of our material, emotional and symbolic exchanges and connect them to our broader understanding and experiences. As defined from a cognitive linguistic perspective by Lakoff (2006):

'Frames are the mental structures that allow human beings to understand reality – and sometimes to create what we take to be reality ... They structure our ideas and concepts, they shape how we reason, and they even impact how we perceive and how we act. For the most part, our use of frames is unconscious and automatic – we use them without realising it.' (Lakoff, 2006, p.25)

The importance of 'framing' in determining pro-social value was also elegantly demonstrated by Kay and Ross (2007) and Liberman, Samuels and Ross (2004), who found that when they labeled the same cooperation game as 'Wall Street Game' or 'Community Game', there was a significant increase in levels in cooperative behaviour in the 'community' context versus the 'competitive' context.

Branding is a deliberate attempt to positively frame a given product or service in stakeholder's minds. This can include presentation of logos, design and physical environment, specific communications materials and activities, the behaviour and interactions of the employees with stakeholders and the overall reputation of the organization. Branding attempts are normally designed to positively increase the

summary judgment of the product or service. However not every branding attempt is successful in positively increasing the summary judgments of a given product or service. Some branding attempts like advertisements or corporate actions can have little or no impact on stakeholder summary judgments. Indeed, some branding attempts can back - fire and negatively impact stakeholder summary judgments of the product or service. An example of a branding activity back - firing would be the compulsory down -load of U2's album 'Songs of Innocence' on iTunes in 2014. It is also possible that a critic or competitor of a product or service can negatively impact summary judgments of that product or service through 'smear' campaigns. This form of branding has been dubbed by Simon Anholt (2012) as 'belligerent branding'.

One final point to note, the actions and interactions of an organization can positively increase the summary judgments of that brand but the organizational culture might choose to 'label' that activity as 'branding' or as something else (for example programme improvement, customer service, organizational commitment). Different organizational cultures might positively or negatively view the 'brand' of 'branding' as a legitimate organizational use of human and financial resources. This means that activities that are positively understood as part of 'branding' in an organization selling mobile phones (for example the interactions between customer service employees and phone users) might be negatively understood as part of 'branding' in a humanitarian aid context (for example the interactions between aid workers and aid recipients).

Overall Research Design

Empirically this thesis uses mixed methods research (Tasakkoru & Teddlie, 1998) to help understand the role of brands and branding in pro-social contexts from different, complementary perspectives. The first research study investigates how NGO decision-makers construct brands and branding using the Interpretative Phenomenological Analysis (IPA, Smith 1996) method, and identifies four master-themes around the barriers to brands and branding within NGOs. The second research study investigates charity donor decision- making and explores the different contributions of surface framing (charity communications) and deep framing (the world-views of the donors), using a laboratory experiment between subjects. The third

research study investigates the dynamics of good will (as operationalized by kindness experienced and kindness intended) at multiple levels and looks at the contribution of dispositional variables, collective identity and societal beliefs, using a naturalistic SMS-based experiment over six weeks. In addition, it experimentally investigates the influence of relational framing (as operationalized by providing feedback of the previous weeks average results randomly to a third of the participants each week) on engagement with the pro-social initiative over time.

In Summary

This thesis investigates the potential role of brands and branding as frames for engagement in meeting pro-social goals. Brands and branding increasingly play a role in NGOs, non-profits and charities but their use can be resisted and resented internally and externally. This thesis aims to explore the role of brands and branding in pro-social contexts, and make a theoretical contribution to a pro-social theory of brands and to more general theories of branding. Four psychological theories of branding are reviewed and critiqued in terms of potential relevance to the pro-social sector. This highlights that all of these theories are insufficient to explain the role of branding in pro-social contexts due to the lack of alignment between stakeholders' experiences and expectations, the power imbalances between stakeholders and the relative priority on the importance of pro-social organisations *per se* versus the importance of their pro-social goals.

Following the pragmatic method (James, 1907; Peirce, 1878; Dewey, 1920), this thesis uses mixed methods research to investigate the research questions. The three research studies include an interpretative phenomenological analysis (IPA, Smith, 1996) study of how ten NGO decision-makers construct brands and branding, a psychological experiment to explore the role of surface frames (charity message content) and deep frames (donor world-views) in donor motivations and a naturalistic experiment to understand the dynamics of pro-social behaviour and the effect of relational framing on voluntary participant engagement.

The next chapter reviews the broader literature and how it might inform the research

questions within this thesis. The following three chapters will outline each of these pieces of research and discuss the relevant findings. The final chapter will integrate those findings and limitations with a view to answering the specific research questions. It then discusses the potential implications for brands and branding in the pro-social sector and the overall implications for theories of branding.

Chapter 2. Broader Literature Review

Following the pragmatic philosophy of James (1907) Peirce (1878) and Dewey (1920), this literature review seeks to integrate and triangulate the findings and theoretical frameworks across different literatures in order to shed light on the potential common ground between branding and the pro-social sector. The incorporation of different literatures allows for comparison of reductionistic versus holistic explanatory perspectives, which is an important dichotomy within scientific theorizing (Koestler & Smythies, 1969). As Bandura (2001) has proposed - 'the field of psychology is the one discipline that uniquely encompasses the complex interplay between intrapersonal, biological, interpersonal and sociocultural elements of human functioning....it should be articulating a broad vision of human beings, not a reductive fragmentary one' (Bandura, 2001, p, 18).

Brands and branding have been studied from various perspectives, including economic, legal, cultural and psychological (Eshuis & Edwards, 2008). The previous chapter outlined and critiqued the key psychological theories that are relevant to this thesis. In this chapter a multi-disciplinary literature review aims to integrate broader relevant evidence and perspectives to contribute to the specific research questions below:

1. What is the function of brands and branding in pro-social contexts?
2. How should brands and branding in pro-social organizations be understood and applied to *align* internal and external stakeholders?
3. Do brands and branding in pro-social contexts differ in kind or in degree from brands and branding in general?
4. How can understanding the role of brands and branding in pro-social contexts contribute to general theories of brands and branding?

Value Theory as Framework for Literature Review

This literature is discussed and linked using value theory, which has been used explicitly and implicitly by philosophers, economists, sociologists and psychologists to investigate how, why and to what degree people put value on things, people, relationships and ideas. In both descriptive and normative terms, both brands and pro-social initiatives represent (i) value as a specific outcome of interactions and transactions and (ii) values as the context in which we understand, frame and make sense of those interactions and transactions. Recent developments in behavioural economics have demonstrated that subjective valuations of physical experiences can be highly variable (Ariely, Loewenstein & Prelec, 2006) and that the ‘choice architecture’ or the presentation context of alternatives can radically alter people’s preferences (Ariely, 2008; Kahneman, 2011; Thaler & Sunstein, 2008). The somewhat arbitrary nature of value is likely to be magnified in the inevitably value-laden territory of ‘doing good’. Importantly, the introduction of financial penalties or incentives into social or moral domains has been found to reduce the valuation of the service or contribution in question (Gneezy & Rustichini, 2000a, 2000b; Frey & Oberholzer-Gee, 1997).

Brands and Value Creation

Brands may be legally owned by one corporation (Doyle, 1994; Jones, 2005) but functionally, emotionally and symbolically their value lies in the interactions and interpretations of all their stakeholders. Brands can only create value in the context of relationships (Fournier, 1998) and Holt (2002) has proposed that the value of brands is based in a dialectical negotiation between the producer and the consumer as ‘artist –citizen’. Muniz and Guinn (2001) have used ethnographic research to demonstrate how brands like Apple and Saab can create modern communities around shared value and shared values. The flip side of the relational and interpretative nature of brands is that brand value can be damaged by negative events or behaviour (Aaker, Fournier & Brasel, 2004). Furthermore, competitors or critics can deplete value by explicit or implicit ‘framing’ of a given organization or sector, in what Anholt (2007) has dubbed ‘belligerent branding’. As he has explained it:

'The alternative to managing your national image and reputation is not, 'Not managing it' *it is allowing other forces or agencies to manage it for you*. When they 'brand' your country as a 'Rogue State', an 'Evil Empire' or one of the 'PIG's – you have left your fate to external forces rather than taking control yourself – I call this abdication of responsibility 'Belligerent Branding'' (Anholt, 2007, p. 42, *my italics*)

In a similar way brands can only create value within the organization if they are an integral part of that organization and its behaviours, interactions and culture (Hatch & Schultz, 2009). Mitchell (2005) has gone further and has proposed brand as 'gestalt' when he said that brands are the tip of the corporate iceberg and that strong brands are the natural result of focusing on creating and delivering customer value. As Mitchell (2005) has expanded:

'Having a strong brand is indeed crucial for every successful business [but] brands are not built by a separate activity called 'brand building', any more than races are won by a separate activity called winning' (Mitchell, 2005, p.9)

Jones (2005) has proposed, following Freeman's (1984) stakeholder approach, that we need more holistic ways of approaching overall brand value, not confining brand to the eyes and valuations of a single stakeholder, the customer. He has argued that the development and survival of the brand, and the creation of shareholder value, is dependent on understanding the value the brand creates for stakeholders and the context in which the brand exists. Although each relation could be viewed independently, he has argued that they are all connected in reality, in terms of brand value through the 'hub' of the brand. He has recommended a systematic process, which identifies relevant stakeholders, identifies the value of each relationship and identifies the nature of exchange within the relationship. Jones (2005) has proposed that there are three types of exchange – functional, emotional and symbolic - and that each one will have different implications for the overall brand 'value-constellation' (Normann & Ramirez, 1993). Having examined the broader literature it appears that there are four key elements that could make important contributions to brand value and values in the social purpose sector – exchange, trust, efficacy and language. The possible contribution of each of these elements to brand value is discussed below:

The contribution of exchange to social purpose brand value

At the centre of any debate about the value and values of the pro-social sector lies a fundamental question around the nature of exchange that takes place during acts of help. Altruism has represented a conundrum for rational economics: Fehr and Fischbacher (2003) have defined altruism as ‘costly acts that confer benefits on other individuals’. Rachlin and Locey (2011) have conducted behavioural economics experiments and found evidence for three separate motivating mechanisms at play behind altruistic behaviour – a trade off between our current self and our expected future social self, following Parfitt (1984), a trade off between society we would want for ourselves and others in the future and current self-interest and social-discounting, in which we evaluate how close we are to the potential beneficiary and the value of this relationship. These three explanations help shed light on the complex nature of exchange that can take place during acts of helpfulness.

These three mechanisms explain how the exchanges in altruistic exchange do not need to be reduced to the frame of (one-way) ‘charity’, which the anthropologist Marcel Mauss (1954) proposed ran counter to the spirit of reciprocity, when he said ‘charity is still wounding for him that has to accept it’ (Mauss, 1954, p.65). These mechanisms also help support the view of ethnologist Alice Weiner (1985) who has proposed that there is an exchange of spiritual essence between parties during meaningful giving, a relationship is built through the exchange and the donor develops through ‘keeping while giving’ as the recipient develops through ‘receiving while acknowledging’. This can be viewed as an exchange where financial, emotional and symbolic dimensions combine to form a greater whole. This holistic perspective on exchange can help explain why instrumental, self-focused or financially focused exchange can fall short of our human expectations of altruism. Belk (1991) has considered the sacred use of money in the context of gifts and charity and found that gifts can be ‘desacralised’ if there is over-concern with price. In a similar vein, Furnham (2014) has argued that giving money to charity is only sacred when it involves sacrifice and not when it is motivated by personal gain like self-publicity or tax-relief. The sacred dimensions of relational exchange within friendship was succinctly expressed in the prescient words of Machiavelli (1532) when he said:

‘Friendships that are acquired by a price and not by nobility of spirit are bought but not owned, and at the proper moment, they cannot be spent’ (Machiavelli, 1532)

The contribution of trust to social purpose brand value

Trust is the bedrock of social exchange and as mutual trust flourishes, so does the extent of the exchange (Blau, 1964; Kelley, 1959). Trust is undoubtedly an important component of brands and branding (Elliot & Yannopoulou, 2007; Laider-Kylander & Stenzel, 2013) and much of the branding literature explores the building of trust. Elliot and Yannopoulou (2007) have proposed a psycho-social theory of brand-trust, based on Rempel, Holmes and Zanna’s (1985) research into trust within human relationships, where brand-trust evolves along a spectrum from predictability to dependability to trust to faith. Elliot and Yannopoulou’s (2007) ethnographic research supported the hypothesis that higher forms and levels of trust are needed as the context of the brand relationship evolves from functional to emotional to symbolic. However trust itself is a contextual thing – it depends both on the short-term function of the interaction between brand and stakeholder (Aaker, Fournier & Brasel, 2004) and also on the long-term relationship objectives or ‘psychological contract’ (Rousseau, 1995) between the stakeholders. Whereas trust serves or facilitates the value or values within a given relationship, trust is not the whole purpose or value of that relationship. Instead trust underpins some specific functional emotional or symbolic exchange between stakeholders.

The contribution of efficacy to social purpose brand value

Efficacy, the belief in an ability to ‘make a difference’, is also an important aspect of motivation for the pro-social sector and its stakeholders. Bandura (1977) proposed that efficacy perceptions impact on almost everything people do, ‘how they think, motivate themselves, feel, and behave’ (Bandura, 1997, p. 19). At an individual level, a perception of self or system efficacy has been linked to taking social action (Moyhidenni & Montada, 1998) and to charitable support (Cheung & Chan, 2000; Oosterhof, Heuvelman & Peters, 2009). Organisational outcome efficacy and performance (Cheung & Chan, 2000; Oosterhof, Heuvelman & Peters, 2009; Sargeant, Ford & West, 2005) have also been linked to individual donation. In terms

of larger global problems, Bandura (1986) has proposed that collective efficacy might be an important pre-cursor to taking social action. Riggs and Knight (1994) investigated collective efficacy and collective outcome efficacy at an organizational level and found that both constructs correlated with a high degree of job satisfaction and organizational commitment. Bonniface and Henley (2008) explored both constructs in the context of environmental action and found that collective outcome efficacy was a key differentiator between activists and non-activists.

The recent critiques of the aid and development sector (for example Collier, 2007; Easterly, 2006; Moyo, 2009) have gone to the heart of system-efficacy. If the system is not working as it was intended, or it is working to undermine its overall intentions, it raises the serious question of whether stakeholders should continue to support its value and values. System efficacy and NGO efficacy are effectively the overall value and values question underlying the 'frames' debate within the development sector (Darnton & Kirk, 2011; Murphy, 2014). As Murphy (2014) succinctly puts it:

'It seems vital that ... NGOs consider if the very frames employed in their communications are fuelling a public perception that perpetuates development as a never ending cycle of giving within a two-world concept, where one side of the world cannot seem to work their way out of poverty, despite all the donations' (Murphy, 2014, p. 52- 53).

The contribution of language to social purpose brand value

Language and public communications are an important component of frames (Fillmore, 1976) and these 'surface frames' can help activate deeper frames, motivations, values and goals if the language and public communication is consonant with these goals. However, it can be argued that language can be reduced to meaningless slogans (Lakoff, 2004) and 'cheap participation' (Darnton & Kirk, 2011) if it is not supported by behaviour and relationships. Bion (1961) has warned us that words are fickle things, which can be used as much for dissimulation as for communication. Furnham and Gunter (1993) have explained that 'the pseudo-information approach assumes that communication is primarily the responsibility of the sender and is a [one-way] influence process through which people can be changed, controlled, guided or influenced' (Furnham & Gunter, 1993, p.183).

Boggs, Carr, Fletcher and Clarke (2005) have demonstrated that the 'broken promises' exposed by 'pseudo-communication networks' can undermine collective motivation.

Both the pro-social sector and the brand sector are skilled rhetoricians but language cannot substitute for integrity of purpose and relationships. There could be a danger that the sector relies on the vocabulary of 'empowerment' rather than deal with the complex value and values debates 'below the surface' (Tavistock, 2004). The use of language in the development sector can often be opaque, misleading or exclusive. As Apthorpe (2011) has described it:

'The Aidland balloon has come to have a very thick skin. Among other things, this allows it to contain securely a lot of very hot air that is produced by relentless use of vogue keywords- 'participation', 'partnership' 'empowerment', 'civil society', 'democracy' and the like as well as the innocuous little 'local ownership'. Pumped-up to a very high density, this opacity acts to keep ordinary words and language usages out, ordinary sense-making too' (Apthorpe, 2011, p.16.)

This criticism of the use of language in 'Aid-land' to obscure reality, could equally be applied to 'Brand-land', where critics (for example Klein, 2000) have argued that jargon, slogans and puffery are used to distort human beings' value equations, rather than to facilitate or galvanise them. As Furnham and Gunter (1993) have reminded us, the receivers of communications are not passive, waiting to be enlightened from above; they interpret the information in the light of their own needs, values, viewpoints & motivations. Kang and Glassman (2010) have reminded us that individuals' perspective on action or 'ends' is critical to the pragmatist worldview. William James (1907) made the early argument that 'truth' is based on the perspective a person takes on action. Shared meaning then develops through overlapping perspectives. The pragmatic philosopher, Dewey's theory of valuation (1939) has stressed the roles of experience and 'moral rehearsal' in developing our values, in which moral and social value is understood as a continuum of ends-means, cultivated through the constant iteration of action and reflection, relating and responding, valuation and evaluation, being and becoming (Kestenbaum, 1992).

The Key Value and Values Debates within Pro-Social Brands and Branding

The following sections will demonstrate that the underlying arguments for and criticisms of both pro-social organisations and brands are fundamentally connected to individual evaluations and valuations about whether (i) the pro-social sector (ii) brands and (iii) pro-social brands are enhancing or diminishing society's needs and wants (value and values) moving forward. In particular, the specific debate about the role of brands within the pro-social sector is anchored in whether brands are a symbol of trust and effectiveness (which in broad terms would support the stakeholder agenda of the pro-social sector) or whether brands are the instrument of what Markus and Conner (2013) have called the 'businessification' of the pro-social sector, which conflicts with the value and values of many pro-social stakeholders. As economic philosopher Sandel (2012) has warned, there are moral limits to markets and there is a meaningful and real difference between a market economy, in which markets are a useful way to promote efficiency, and a market society, in which markets are the self-proclaimed answer for every societal need and problem.

This clear delineation between market economy and bigger-than-market society can be observed in four related and inter dependent ways in which value theory can contribute to the role of brands and branding in the pro-social sector – understanding *what* constitutes value for the pro-social sector, understanding *how* that value is cultivated and exchanged between stakeholders, understanding how brands could be *legitimately integrated* into pro-social cultures and understanding the relative value of the organisation's pro-social *purpose* versus the *survival* of the pro-social organization per se.

Motivational conflicts between 'Self – interest' and 'Bigger than Self' interest

Batson (2011) has proposed that there are four separate motivations behind pro-social behavior - egoism, altruism, collectivism and principlism - which can compete, cooperate and change according to specific situations. He has defined egoism where the giver is motivated by their own welfare, altruism in which the giver is motivated by the recipient's welfare, collectivism in which the giver is motivated by shared

collective identity and principlism where the giver is motivated by upholding a moral principle or standard. Of these four motivations, Batson (2011) has highlighted that self-interest is the most problematic motivation, as there is experimental evidence that explicit 'self-interest' can 'crowd out' the perceived value of a 'gift' for both givers and receivers. Behavioural economic experiments (Gneezy & Rustichini, 2000; Frey & Oberholzer-Gee, 1997) have shown that where financial incentives were used to promote pro-social behaviour, the incentives have backfired and resulted in less pro-social behaviour rather than more. This has prompted Gneezy, Meier and Reil-Biel (2011) to suggest that financial incentives in pro-social contexts must be used with caution and economists must look at the meaning of 'incentives' in a much broader way.

This evaluative trade-off between self-interest and the interests of 'bigger than self' has been supported empirically by large-scale studies in people's values (Schwartz & Buehner, 2004) and goals (Grouzet et al., 2005). Maio, Pakizah, Cheung and Rees (2009) have found that 'priming' certain values before experiments increases the behaviour that affirms those values and decreases the behaviour that affirms the opposing values. Vohs, Mead and Goode (2006) found that priming people with money brought about a 'self-sufficient' orientation in which people prefer to be free of dependency and dependents. Eastman (1994) has found that helpful behavior was less positively valued by co-workers within organisations, if it was labeled as 'impression-management' versus 'citizenship'.

Newman and Cain (2014) have found that when the general public evaluated organisations and altruistic behaviour, there was evidence of 'tainted altruism', where people downgraded their evaluation of altruism in an organization if it was made explicit that the altruistic act had served the organisation's self-interest or 'profit'. Krishna (2011) has found evidence that 'cause-related marketing' could reduce the overall levels of donations to a cause and reduce the overall happiness of the donor public. This motivational trade-off between self-interest and bigger-than self interest has widespread implications for the behaviour and relationships of the pro-social sector. As Tim Kasser (2009) has written in a report for Oxfam:

'Every time a non-governmental organization attempts to motivate change by appealing to individuals' self-interested concerns for money and status, to businesses ' desire to maximize profit or to government's felt mandate to increase economic growth, it has subtly privileged and encouraged the portion of people's value systems, that stands in opposition to positive social (and ecological) attitudes and behaviours' (Kasser, 2009, p.8).

Motivational and values conflicts between for-profit and pro-social organisations

Research into the motivations of charity 'donating' stakeholders (MacMillan, Money, Money and Downing, 2005; Sargeant, Ford & West, 2006; Ranganathan & Henley, 2008) has found that the motivation to donate or fund NGOs is tightly bound up with the 'cause' that the charity represents. Sargeant, Ford, and Hudson (2008) have found that the most motivating 'brand personality' for charities was linked to the social purpose or goal that it served – for example a benevolent, progressive or conservative personality. Aaker, Vohs and Moligner, (2010) have demonstrated experimentally that the 'stereotype' of the 'for-profit' and 'non-profit' organisation is different for potential users; where non-profits are perceived as 'warm' whereas for -profits are perceived as 'competent'. In addition, Aaker, Fournier and Brasel (2004) have explored the destruction of trust for a 'sincere' brand versus an 'exciting' brand and found that a transgression did far more damage to the sincere brand than the exciting brand. In a separate study Liu and Aaker (2008) have found evidence of the 'time-ask' effect where people who were first asked to consider donating 'time' to a given charity, gave more money than people who were first asked to give money.

An early study by Rawls, Ulrich and Nelson (1975) found that there were key personal values differences between business school students who went into the corporate world (ambition, prosperity) versus the pro-social world (cheerful, forgiving, cooperative). The students did not differ in creativity, intelligence or problem-solving ability. Benz (2005) has found that non-profit workers were more intrinsically motivated around the social value of their work, than extrinsically motivated around money or status (Deci & Ryan, 1985). Cultural psychologists Markus and Conner (2013) have made the observation that despite the fact that business commentators (for example Porter & Kramer, 2011; Teegan, Doh & Vachani, 2004) have started to acknowledge the need for *inter-dependent*

'stakeholder' solutions for long-term survival, the underlying tone (or frame) is still decidedly *independent* and focused on the self-interest of business shareholders.

Cultural conflicts between 'Brands' and Pro-Social identity

The cultures of NGOs, non-profits and charities do not always believe that brands and branding are central to their existence (Bishop, 2005; Deatherage, 2009; Nissim, 2004). Sargeant (1999) has proposed that the overall barriers to marketing within the voluntary sector include a lack of perceived benefit, concern about donor privacy, concern about damage to 'quality' perceptions and overall concerns about the 'morality' of marketing. Kylander-Laidler and Stenzel (2013) have found that around half of large group of non-profit representatives that they interviewed in their research expressed ambivalence about the value of branding for the sector. The specific objections to brands and branding included over-commercialism, exploitation of beneficiaries, leadership vanity, over-competitiveness and symbolic resistance to change. Together, these concerns could represent a fundamental values conflict if viewed through the perspective of the values circumplex (Schwartz & Boehnke, 2004).

Non-profit organisations differ from for-profit organisations in their decentralized structures, flat decision-making and consensus-building cultures (Oster, 1995). Whereas this can lead to highly motivated employees (Benz, 2005) it can also mean that it is hard for leadership to 'impose' solutions on the culture. Silverman and Taliento (2006) cite the description of ex-ambassador, Philip Laidler of his leadership tenure as the president of a non-profit university:

'There you are at the helm of a great ship, with everyone scurrying about. Only after about four months of steering the wheel do you realise that it is not connected to the rudder. Everyone is saluting you and saying 'aye aye' [and then] they all go below the to steer the ship themselves. In many non-profits this is genuinely the case', (Silverman and Taliento, 2006, p.37).

There has been recognition of this values clash within the development of specific brand theories for the non-profit sector. Hankinson (2001) has proposed that branding represents an 'orientation', which needs to be integrated into charity culture versus imposed upon it. Laidler-Kylander and Stenzel (2013) have proposed the adoption of

a 'brand-management' mindset and propose that non-profit branding differs from for-profit branding in three key ways- by being based on social mission (versus consumer benefit), by supporting collaborative advantage (versus competitive advantage) and putting priority on participation versus control. Stride (2003) has gone furthest in proposing that charities and non-profits are fundamentally 'values-based' organisations and that brands and branding must act as a 'lens' on these values above all else.

Legitimacy conflicts between Pro-Social organisations and their goals

Even Adam Smith, frequently seen as the founding father of laissez-faire economics, argued in *The Theory of Moral Sentiments* that 'concern for our own happiness recommends to us the virtue of prudence: concern for that of other people' (Smith, 1759, p.357). There are currently interesting debates at play about the nature of value and values and how society should be moving forward, or what Slim (2002) has called 'the great race for respectable global citizenship' (Slim, 2002, p.9). Business academics like Porter and Kramer (2011) have argued that there is opportunity for the business sector to reinvent capitalism around 'shared value' -where broader societal needs and interests are seen as ingredients in the system-wide value chain- and simultaneously boost the legitimacy of business as a sector. Cognitive psychologists (for example Kasser, 2004; Lakoff, 2008) have argued that the 'bigger than self' values of society are being eroded by the increased focus on self-interest, instrumentalism and profit.

As part of all these debates, ethical theorists (Mitchell, Agle & Wood, 1997; Suchman, 1995; Thomas & Lamm, 2012) are wrestling with defining the relative priority of different stakeholders across the value chain – what Freeman (1982) has called 'The Question of Who Or What Really Counts'. Understanding what constitutes value in the pro-social sector requires understanding what Hoggett (2006) calls the 'dual-character' of social purpose organisations, where the value of the organization lies not only in the services it delivers but in the governance function it serves to uphold society's values. If social purpose organisations are reduced to valuations of their economic output, their societal value is being degraded. Hoggett

(2006) has explained the danger in reducing these organisations to what they produce and a reductive idea of value:

‘ [It serves]... to commodify such relationships, to strip them of their ethical and moral meaning and potential, meaning which is inherent to the very concept of citizen, but marginal to the concept of consumer’ (Hoggett, 2006, p.177).

Slim (2002) has proposed that the NGO or human rights group legitimacy is both derived and generated, where it is derived by morality and law and generated by veracity, tangible support and intangible good will. Each of these elements is anchored in a relationship of ‘care’, grounded in what Slim describes as narrow accountability of action, but also the moral accountability of ‘voice’ and to what extent the NGO represents the intended beneficiary of care. As Slim (2002) has expressed it:

‘It is obviously important for NGOs and human right’s groups to be clear about where their voice comes from in a given situation and to be transparent about it. The precise nature of their legitimacy will change depending on which voice they are using. But they will lose all legitimacy if they are found to be masquerading- a sort of ventriloquist to the poor and oppressed. (Slim, 2002, p.7).

Moral Capital – The Missing Link

In recent times, discussions of capital have moved beyond its traditional economic value, to encompass non-financial values like intellectual capital (Stewart, 1997), human capital (Becker, 1975), social capital (Fukuyama, 1995; Putnam, 2000) cultural capital (Sowell, 1994), and psychological capital (Luthans, Avolio, Avey & Norman, 2007; Luthans, Youssef, & Avolio 2007). In all of these cases, Kane (2001) draws a distinction between wealth, which is a stock of a particular resource, and capital, which is when that resource is deployed or invested in some enterprise for some expected return. As Kane (2001) has expanded:

‘Mere money, then, is not necessarily financial capital, nor skill necessarily human capital, nor knowledge necessarily intellectual capital, nor a network of social relationships necessarily social capital. *Capital in other words is wealth in action*’. (Kane, 2001, p.7, *my italics*).

In response to declining trust in politics and business, political scientist Kane (2001) and business ethicist Sison (2003) have separately argued a role for deliberately cultivating moral capital. Kane has defined moral capital as 'moral prestige - whether of an individual, an organization or a cause as – in useful service' (Kane, 2001, p.7). Kane conducted four case studies into Abraham Lincoln, Charles de Gaulle, Nelson Mandela and Aung San Suu Kyi to understand how each one had mobilized moral capital and concluded that the four key elements underpinning moral capital were (i) cause, (ii) action, (iii) being an exemplar and (iv) rhetoric/symbolism. As demonstrated in this quote by Abraham Lincoln – the 'long-purposed man' – the ultimate value of moral capital resides in long-term moral effectiveness, rather than the short-term reputation of the leader:

'If I were to try to read, much less answer, all the attacks made on me, this shop might as well be closed for any other business. I do the very best I know how - the very best I can; and I mean to keep doing so until the end. If the end brings me out all right, what's said against me won't amount to anything. If the end brings me out wrong, ten angels swearing I was right would make no difference,' (Lincoln, in Carpenter, 1995).

For the purposes of this thesis, it is argued that a moral capital perspective gives insight into the function of the pro-social sector in the world, in terms of value and values. At a fundamental level, the underlying purpose of pro-social organisations is 'doing good' or social mission, in whatever way a given organisation defines it (Laidler-Kylander & Stenzel, 2013; Martens, K., 2002, Werker & Ahmed, 2008). If we apply a moral capital framing onto brands and the pro-social sector, we can understand why even if the 'text' or 'value' of the two constructs is aligned, it is possible that the 'context' or values of the two constructs can clash or collide. From a moral capital frame it becomes clear that the cultural objections of pro-social organisations to the idea of 'branding' (commercialism, exploitation, vanity) can be seen as eroding rather than building the moral capital of the pro-social organisation with its internal and external stakeholders. A moral capital perspective also highlights a possible role of brands for the pro-social sector to act as a collective frame for social purpose, building trust, efficacy and exchange. Bandura (2001) has stressed the importance of influencing and responding to the belief systems that surround us, in a dynamic cycle of 'triadic reciprocal causation' (Bandura, 1986) in order to reach our collective societal goals.

At a societal level, Kang and Glassman (2010) have argued that moral thought and moral action, while connected, can exist separately and serve different social purposes. They have proposed that moral thought acts as a badge for 'belonging' to certain groups or society, effectively performing the function of 'cultural capital' (Bourdieu, 2001) whereas moral action is part of the social relations between people and performs the function of creating social capital (Fukuyama, 1995), which in turn creates a bedrock of trust to facilitate societal interactions. Psychologists Bandura (2001), Dewey (1934) and James (1907), along with Aristotle, have argued that it is important that moral thoughts are linked, experimentally and experientially, to moral actions, as part of what Dewey called 'vital experience' (1934)– otherwise our individual and collective moral development and potential is limited. As expressed by Martin Luther King (1967):

'One of the great problems of history is that the concepts of love and power have usually been contrasted as opposites - polar opposites -so that love is identified with a resignation of power, and power with a denial of love. What is needed is a realization that power without love is reckless and abusive, and love without power is sentimental and anemic. Power at its best is love implementing the demands of justice, and justice at its best is power correcting everything that stands against love,' (King, 1967).

A moral capital perspective could also explain why some business academics (for example Teegan, Doh & Vachani, 2004) might see a critical role for the pro-social sector in governance, to help legitimize international business. The implicit preoccupation of the pro-social sector with moral capital, over and above other forms of capital, might also explain why some other business academics (for example Porter & Kramer, 2011) might be frustrated by what they perceive as the NGO sector's lack of priority on (shared) value creation, as outlined by the corporate business agenda that they promote.

In Summary

This broad literature review uses a value theory framework to contribute to understanding the role of brands and branding in pro-social contexts. It examines findings from multi-disciplinary literature to make some contribution to the specific research questions. It outlines the potential roles of exchange, trust, efficacy and language to the understanding and application of brands and branding in pro-social contexts. It highlights the trade-off in motivations between self and ‘bigger-than-self’, the trade-off in motivations and values between for-profit and pro-social brands, the cultural ambivalence within pro-social organisations about branding and the underlying stakeholder legitimacy debates around the pro-social sector. It is proposed that a moral capital framework (Kane, 2001; Sison, 2003) might be the missing link to integrate these findings and perspectives within pro-social brands and branding.

Chapter 3. Worlds Apart? – An Interpretative Phenomenological Analysis of how Oxfam decision- makers construct and make sense of the role of brands and branding within NGOs.

Abstract

Brands and branding are increasingly part of how Aid and Development NGOs operate. This case study explored how ten decision makers within Oxfam construct and ‘make sense’ of the role of brands and branding using Interpretative Phenomenological Analysis (IPA, Smith 1996). Four master-themes were identified demonstrating four levels of conflict where the role of brands and branding can be constructed: (i) ‘brand’ can be understood and used as a decision –making cognitive ‘heuristic’ to guide external and internal stakeholders to engage with the NGO (ii) ‘brand’ and ‘branding’ can symbolically unite diverse stakeholders around a shared identity (iii) culturally ‘brand’ can act as a bridge between the internal values of the NGO and the values of wider society and (iv) within a systems framework ‘brand’ can provide a ‘feedback loop’ between the intentions of the NGO with the evidence on the ground, continuously learning and adapting from new evidence and events. It is proposed that NGO branding could integrate these four levels using Purpose as an organizing principle, which would act as a feedback loop for stakeholder coherence and efficacy, connecting effectiveness and evidence to intention and acting as a shared crucible for stakeholder interests. Brand- as -purpose allows the NGO to be ‘Bigger than Self’ (but still includes the NGO Self) and facilitates the NGO to work towards the greater cause in question, in a collaborative, iterative and transparent way. Theoretically it is argued that if NGO brands are constructed and manifested purely in terms of narrow and competitive self-interest, the brand meaning can undermine the very moral capital on which the NGO sector is founded and depends. More research into altruistic brands as conduits for social purpose and catalysts for moral capital is recommended.

1. Introduction

Official development assistance is estimated by the United Nations at \$126 billion (United Nations, 2013). The World Bank (2007) has estimated that 15% of overseas aid is channeled through NGOs, defined by K. Martens (2002) as ‘formal (professionalized) independent societal organizations whose primary aim is to promote common goals at the national or the international level’ (p. 282).

There are at least three specific factors changing the outlook for how NGOs operate in the aid and development space. First, the Paris Declaration in 2005 has outlined the principles that will govern the dynamics of aid between donor and recipient countries to include harmonization, alignment, ownership and mutual accountability. This has implications for how NGOs define success and define themselves in relation to donors and recipients and each other. Commentators like Edwards (1997) have argued that NGOs need to develop ways of working that are less focused on promoting their own profile and more focused on collaborating to be effective on the ground. Following on from the Paris Declaration, The Accra Agenda for Action (2008) has pledged to ‘intensify our efforts to provide and use development assistance in ways that rationalise the often excessive fragmentation of donor activities at the country and sector levels’ (p. 2).

Secondly, recession in many of the world’s wealthier countries has meant that there is less aid money overall (United Nations, 2014) which means that individual NGOs are faced with the dilemma of securing funds to fund their projects and initiatives while attempting to live up to the principles of the Paris Declaration. In the U.K, the Department For International Development (DfID) established the Disaster Emergency Committee (DEC) in 1963, in which thirteen NGOs operate as a collaborative umbrella group to secure funding for specific global disasters. These collaborations have efficiencies for overall fund raising but could reduce the revenue streams for individual NGOs.

Thirdly, the Edelman Trust Barometer (2012) has demonstrated that global citizens’ trust in NGOs, operationalized as ‘trust to do the right thing’ is only 50%. This trust

level is higher than the other sectors – for example government, business and the media- but in itself the fact that only half the general population trust NGOs to ‘do the right thing’ would seem relatively low for a sector, tasked with promoting ‘common goals’ (Martens, K., 2002). In aid and development, NGOs have been specifically criticized for ineffectiveness, post-colonialism and self-righteousness (Collier, 2007; Easterly, 2006; Moyo, 2009), leading some commentators (for example Edwards, Hulme & Wallace, 1999; Pearce, 2000; Slim 2002) to debate the role and value of NGOs.

Brands and branding have played an increasingly explicit role in NGOs in recent years, as documented by recent case studies about Amnesty, Oxfam and others by Kylander and Stone (2012). Despite broad agreement that trust and reputation have always been fundamental to the existence of non-profits (Burt, 2012; Burt & Dunham, 2009; Hansmann, 1980), the sector has been slow to accept the ‘formal’ language and practices of marketing, brands and branding (Hankinson, 2001; Seargent, 1999; Stride & Lee, 2007). Critics of branding in the NGO world (for example Levine, 2009) have argued that ‘brands’ are fundamentally self-promoting, distracting individual NGOs from the harmonized, collective objectives of aid and development.

It is possible that sectoral differences in stakeholder culture (Jones, Felps & Bigley, 2007) have led theorists to argue the need for a separate approach to branding for the NGO sector versus the for-profit sector. Hankinson (2001) has investigated branding as a management competence and practice that needs to be cultivated within the non-profit sector. Stride and Lee (2007) have proposed that charity branding needs to be conceptualized through a lens of ‘values’ that links the brand to the inherent vocation and ideals of the charity in question. Laidler-Kylander and Stenzel (2013) have proposed a non-profit brand theory which connects the brand to the ‘theory of change’ that guides and underlies the specific NGO, nonprofit or charity.

There is a need to further empirically explore brands and branding and how they actually manifest in the decision-making and behaviour of NGOs internally and with the general public externally. In addition, there is an opportunity to theoretically align theories of branding for NGOs, non-profits and charities with the more general theories of branding – specifically do brands and branding in NGOs *differ in kind or*

in degree from brands and branding in other sectors? The objective of this research is to make some contribution to both questions.

As a first step to shedding light onto these two questions, it was important to first talk to NGO decision makers in their own environment and to understand how they construct 'brand' and 'branding' individually and collectively in the 'real messy world' in which they make decisions. The research objective was to gain understanding into how participants make sense of their own and others experiences and expectations of brands and branding within a 'working practice' case study in Oxfam, acknowledging that the potential value of the insightful case-study is in providing a means of 'troubling' our preconceptions, assumptions and theories (Campbell, 1975).

2. Research Methodology

This study was designed and conducted as an Interpretative Phenomenological Analysis (IPA, Smith 1986). This is a form of qualitative research, which seeks to respect the experiences, reflections and interpretations of both the research participants and the researcher. The IPA approach has three main epistemological roots: phenomenology (see A. Giorgi & B. Giorgi, 2008, for a review of phenomenological psychology in qualitative research), symbolic interactionism (see Denzin, 1995, 2004 for a review of how this particular epistemology informs qualitative psychological research) and hermeneutics (for a review see Lavery, 2008). The phenomenological root furnishes IPA with its primary concern with individual lived experience. The symbolic interactionist root assumes that people make sense of their experiences and derive meaning from them through social interaction and dialogue. Finally, the hermeneutic root furnishes an acknowledgement of the interpretative role of the researcher in 'making sense' of how an individual 'makes sense' of his or her lived experience. Through this dialogue, the researcher actively extracts meanings that would not otherwise be directly accessible to him or her.

Branding is a relational concept, which encompasses how internal employees see themselves and how they make sense of their stakeholders making sense of the NGO. It is extremely valuable to listen to the experiences and perspectives of decision-makers who are working with and within a process of articulating and implementing the Oxfam brand in the 'real messy world' of an NGO. Following on from Heidegger (1962/1927), this research adopts a hermeneutic phenomenological approach and tries to uncover the conceptual existence of brands in an NGO context, from what Smith, Flowers and Larkin (2009) call a deliberately *worldly* perspective – where 'worldliness' ranges from the physically-grounded (what is possible?) to the inter-subjectively-grounded (what is meaningful?). The integration of tangible experience with intangible meaning is a valuable framework for exploring how 'brand' plays out for different Oxfam stakeholders, within their 'psychological contracts'. In addition, this research also seeks to include the 'project' perspective of Sartre (1956/1943), which argues that we are not only 'being' in the world, we are caught up in 'becoming' (what is intended or desired?). The perspective of 'becoming' is an important filter on NGO branding because the work of the majority of NGOs is by definition 'work-in-progress' so the past and present are inevitably interlinked with expectations about the future.

A central aspect of IPA is the 'double hermeneutic' in which the researcher is attempting to interpret the participants who are attempting to interpret themselves. An important challenge for the researcher in this process is to balance what Ricoeur (1970) called the 'hermeneutics of empathy' with the 'hermeneutics of suspicion' within their own interpretative stance. This inter-subjective, dynamic and iterative process of sense-making is called the 'hermeneutic circle' which includes the 'foreceptions' of the researcher and the interactions, reflections and interpretations before, within and after the interview, through co-creating, engaging with and reflecting on the data. In so far as the subject of 'brands' already deals with the perceptions, expectations and experiences of other people, it could be argued that this IPA study deals in a 'triple hermeneutic' – the researcher's interpretations of the participants' interpretations of their own and others' interpretations of experiences of Oxfam- and these additional layers of perspectives render the 'hermeneutic circle' effectively a 'hermeneutic sphere'. This multi-level dimension of meaning-making and sense

making across, between and within multiple relationships is depicted in the schematic below (See Figure 5, below).

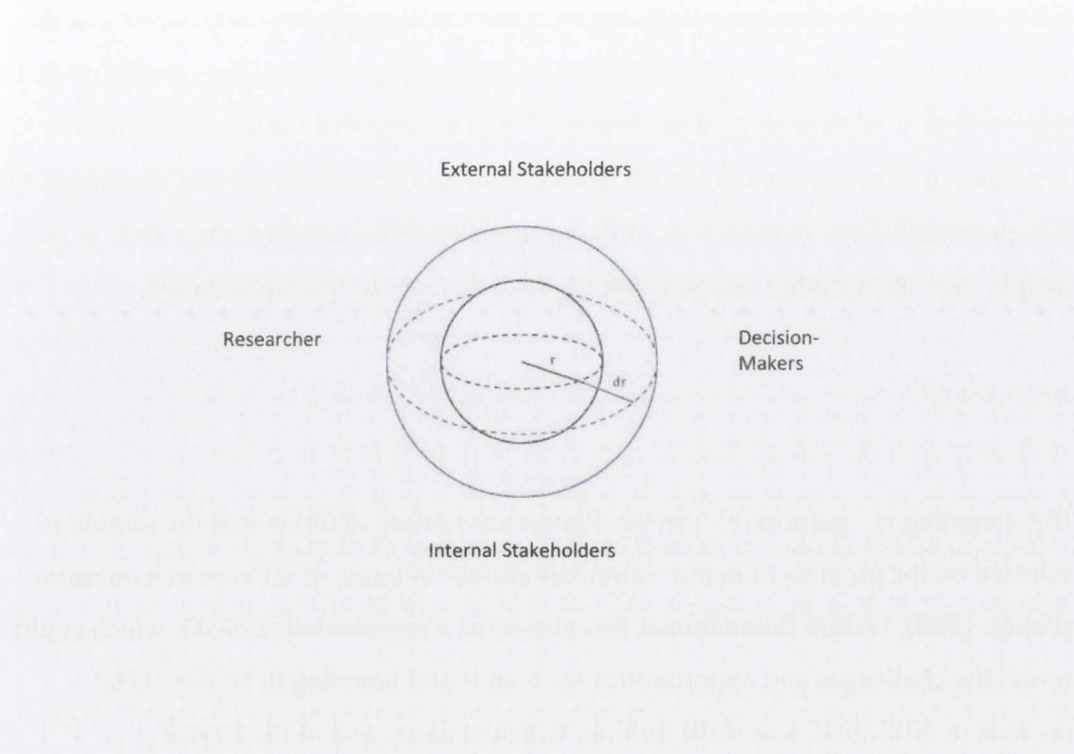


Figure 4- Hermeneutic Circle Becomes Hermeneutic Sphere: Researcher Interprets Decision Makers Interpreting Stakeholders

IPA is hugely influenced by phenomenology’s founding principle, outlined by Husserl (1927) as ‘to go back to the things themselves’. Smith, Flowers and Larkin (2009) have recommended that experience should be examined in the way that it occurs and in its own terms. Willig (2008) has outlined that IPA requires reflexivity but does not theorise reflexivity and Weick (2002) has defined reflexivity as ‘interpretative agility’. Eatough and Tomkins (2010) have proposed that IPA organizational research requires ‘integrative reflexivity’. They argue that ‘from a phenomenological perspective reflexivity is a sensibility that is woven into the very fabric of our research, less of a model, more of an experimental commitment, less of a tick box, more of a trajectory’, (Eatough & Tomkins, 2010, p.177). One of the principal properties of sense –making is that it is driven by plausibility not accuracy (Weick, 1995). It has been argued (Tomkins & Eatough, 2014) that the IPA method respects the authority of the participants to reflect or partially reflect their own

psychological reality, rather than simply reflecting the 'public display' or the social construction of language (Hammersley, 2008).

As a working- practice case study, this research is *idiographic* but it is hoped that the level of reflection around, dialogue with and dissemination the analysis would mean that the findings are theoretically transferrable. The ten individual decision-makers are operating in dynamic system, which leads to multiple levels of analysis – as experts they are speaking for the organization, as decision-makers they are speaking within it, as people they are speaking as audiences for the audiences of the organization.

2.1. Sample Selection

IPA sampling is 'purposive' (Smith, Flowers & Larkin, 2009) in that the sample is selected on the grounds of being 'information-rich' in terms of the research question (Patton 1990). Oxfam International was chosen as a representative NGO, which could reveal the challenges and opportunities for brands and branding in NGOs. Total revenue in 2011/2012 was €918 million, which makes it one of the largest organisations in aid and development in the world. Oxfam was initially set up in the U.K in 1942 as a response to famine in Greece. Oxfam is now a 'confederation of 17 affiliates, networked in 94 countries, as part of a global movement for change'. (Oxfam Annual Report 2011/2012 –p. 5). In 2011 /2012, Oxfam embarked on defining a global 'brand identity' in a collaborative process between affiliates. At the time of this research, this process was on going, but there was 'working consensus' around a brand identity of 'Practical Visionary'. The on-going process meant that decision-makers were conscious of 'brand' as a concept and how it worked or conflicted with aspects of self or shared identity.

Permission was obtained from the Oxfam CEO and initial contact made with the Head of International Communications and Marketing. Having discussed the research question, an initial sample of eight brand decision-makers was agreed. It was important for the research that the sample represented people who were 'outside' marketing – including Finance, Human Resources and the Programme. After conducting the initial eight interviews, it felt important to interview to get more

perspectives from ‘outside’ the centre so two additional interviews with decision – makers based in other Oxfam affiliates were conducted. Within the final ten research participants, half the sample had experience in working in for-profit or private sector organizations and half the sample had only worked in NGO’s and/or the public sector. Everyone was working within the broad Oxfam culture which lent an appropriate amount of ‘homogeneity’ to study them as a group but there was a deliberate seeking of different perspectives from both a role and location point of view in order to ensure a ‘richness’ in the data, interpretation and analysis.

2.2. Data – Collection

Participants were approached in advance of the interview and sent a draft interview – schedule in advance of the session (See Appendix A). It was important to acknowledge the ‘expertise’ of the interviewees by allowing them time to reflect, in advance of each discussion. The researcher also ‘positioned’ herself, in line with her 20- year working experience in brand management, strategic planning and consultancy, as somewhat ‘expert’ in the area of brands and branding in general; but the researcher made it clear that she had no direct experience of working with brands in a development NGO context. The purpose of the interview was for the participants to help the researcher understand the role of brands and branding for Oxfam from their own perspective, including their perspective of how branding helped or hindered Oxfam’s goals and relationships with internal and external stakeholders. Participants received a briefing and consent form in advance of the interview and written consent was obtained for all. Eight interviews took place face to face and one interview took place on the telephone and one took place on Skype. The duration of interviews was between 30 minutes and 2 and half hours, with average interview length being 90 minutes. Permission was obtained for tape-recording and written notes were also taken. The researcher listened to the audio recordings and typed up all of the interview transcripts as part of the analysis process. The original audio files were stored in a confidential filing system and they can be obtained from the researcher if any data verification is needed.

2.3 Analysis

IPA does not prescribe a 'single method' for the analysis of data – indeed the iterative, inter-subjective and emergent nature of the analysis makes it impossible to do so. Nonetheless, Smith, Flowers and Larkin (2009) have laid out some general steps and this analysis is in keeping with those guidelines. The process of analysis was an iterative process in which the researcher initially engaged with the data *line-by-line* and generated emergent themes. These themes were discussed and developed with the co-researchers. These themes were then initially disseminated in a working seminar with academics and doctoral researchers. From there, the researcher worked to generate a more 'interpretative dialogue' between the researcher and the data, where the researcher attempted to link the data to previous literature in development, organisations and brands. From here the researcher began to construct a working framework or *gestalt* to help illustrate the relationship between themes. This iterative analysis, interpretation and theme development process followed the approach of other IPA studies in organizational contexts (for example Cope, 2011; Tomkins & Eatough, 2014; Millward, 2006)

The researcher engaged in dialogue about that framework and the themes and disseminated this framework and themes in another working seminar with academics and doctoral researchers and also a larger public seminar with academics, brand consultants and communications professionals and NGOs. The feedback and comments from these two seminars was incorporated into this analysis, to help test and develop the coherence and plausibility of the researcher's interpretation. A selection of the transcripts and theme developments was also shared with an independent qualitative researcher to sense check the interpretation of the data and the development of themes. This extensive process of analysis and sense-making dialogue took place over a two-year period of revisiting the interview transcripts and emergence of themes. The analysis was then finalized as a narrative together with tables that clearly show the overall framework and link the original data to the themes. A complete example of a research protocol, which includes the typed transcript of an interview and demonstrating the emergence of themes, content summaries and observations on the participant and researcher language is provided in Appendix H.

3. Findings

This section highlights the four main themes that emerged from analyzing the interviews with the ten participants. The themes are interconnected and seek to understand branding from the individual to the cultural to the systemic and from the cognitive and emotional to the symbolic and universal. The four master themes and the sub-themes that underpin them are depicted below (See Table 1):

Table 1: Master Themes Emerging from Interpretative Phenomenological Analysis of Branding with Ten Oxfam Decision Makers

<u>Super-Ordinate Themes</u>	<u>Sub- Themes</u>
1. A Complex Balancing Act	<i>1.1 Sheer Amount of Factors and Actors</i> <i>1.2 Balancing Hearts and Minds</i>
2. ‘Divided Selves’	<i>2.1 Inside-Out</i> <i>2.2 Outside- In</i> <i>2.3 Same but Different</i> <i>2.4 Part of Problem, Part of Solution?</i>
3. Cultural Legitimacy of Branding	<i>3.1 Hero versus Villain?</i> <i>3.2 Assimilation versus Integration?</i> <i>3.3 ‘Theory-of-Brand’</i>
4. Underlying Legitimacy of NGOs	<i>4.1 ‘Under Siege’</i> <i>4.2 Managing Expectations?</i> <i>4.3 ‘Becoming’</i>

3.1. 'A Complex Balancing Act'

This theme highlights how cognitively complex brand- decision-making is in the NGO world – partly as a result of the sheer amount of factors and actors that need to be weighed up and the tensions or ‘double-edged swords’ between them. This complexity is heightened by the need to balance reason and emotion within Oxfam and on behalf of external stakeholders. This need to balance hard facts with emotion is not confined to the pro-social sector (and indeed has relevance for managers in general as exhorted by Rousseau (2006) in her argument for ‘evidence-based management’) but in the case of cause-driven NGOs, it could be argued that there is additional cognitive and motivational complexity that arises from the highly uncertain and frequently non-existent ‘facts’ or ‘evidence’ and the highly charged and ‘vocational’ context of moral and emotional crises and imperatives.

Brands and branding decisions in NGOs seem to require continual and constant weighing up of multiple factors and actors and balancing the practical and emotional tensions between them. This can be seen in the interviews in terms of (a) the sheer amount of factors that need to be weighed up in every decision (b) balancing the ‘ hearts and minds’ of all internal Oxfam stakeholders and of external stakeholders, in particular the general public.

3.1.1. Sheer Amount of Factors and Actors

The interviews with decision-makers demonstrate the continual trade-offs in making brand or branding decisions between different issues (for example short-term aid versus long-term development), different stakeholders (for example individual donors versus institutional donors), different organisational legacies in different countries (for example Oxfam has been built around food crises and charity shops in the U.K whereas it is a specialist expert on development in the U.S.). There is a sense from decision-makers that reconciling these factors and actors is a difficult challenge for Oxfam in terms of defining or managing some common aspect of very different stakeholders.

Participants outline the trade-offs for Oxfam in motivating donors around short-

term aid crises versus the need for longer- term development projects:

Daniel: Of course you can move an audience over time... [to be motivated by development]... but you will have to balance your own need to raise funds during the next emergency appeal – you will need to balance the slightly alarmist and crisis-ridden tone of emergency appeals with longer term needs..

Alison: In Oxfam we spend carefully on brand – there are other ways than advertising for us to build our brand – but also we have to maximize the amount of money we give to poor people in [a given country] – so it's not about lashing and spending lots of money – the stuff that we do works very well and we try to get noisy when we're already in the media – i.e. emergency – so we get as effective a campaign as possible...

Daniel: The debate for us is between the balance between restricted and unrestricted funding – and the debate between individual and institutional funding....Of course we get the most funds when there is an emergency when people's generosity is highest and when 'need' is highest.. so that's good but that is restricted money which is being spent on that particular thing...Unrestricted funding is something we get from our long-term supporters – who contribute to us and allow us to spend as we want to ... it is predominantly the regular givers who give us X a month but don't restrict it ..The balance towards 'restricted' is tipping (the wrong way) There is a real challenge for institutional and individual (large and small) – if there is nowhere else to go – we will go to the institutions.....They are much more demanding than individuals – the rules are very clear – we cannot bend them...

Participants illustrate how the combination of different histories of different Oxfam organisations and different cultural contexts in countries can lead to Oxfam having a very different reputation and different brand challenge in specific regions:

Claire: We have different legacies in other countries – in the U.K we have always been about food – but Oxfam America have never talked about 'food' ...Also we have lots of shops in the U.K, which give us different starting points for the brand.....We do need to have our presentation consistent for the UN or the Pepsars of this world – you will pay slightly more attention to Oxfam in total if it is all presented in a similar way

Alison: In the U.S – that's the place where 'politics' as a word is a problem – because of the big kick-backs and the political lobbyists – in the U.K we need to be 'edgy' and that's right in the U.K market – we can't be 'party-political' but we can be 'political'..... In China and Hong-Kong, it is counter-cultural for a 'charity' to be political – in Brazil and

France people want us to be political – and in the Netherlands it's a problem but that's because most of our funding is from the State, which is unusual for an Oxfam

Paul: The shops are a blessing and a curse – 700 shop fronts – no wonder we have 90% awareness and salience and that's fantasticbut we're the 'hoover' of charity shops – if you think charity shops in general are smelly – you'll think ours are...It's a double-edged sword –and for a lot of people [the relationship with Oxfam Shops] it's their only relationship with Oxfam –you might see a shop 50 times a year - so it's a mixed bag of contribution...

Daniel: We like to describe ourselves as a global movement –and it is very important to us sitting here [in Oxfam House in Oxford] – there is still a perception that we are a British organization, as opposed to an overseas aid organization - and when you look at the growth of the network, it is very clear that we are a global organization in reality...[In] the majority of cases ... [Oxfam] would want to be seen as part of their civil society [within a given country] and that is where the issue of being seen as British is going to be a problem – and this isn't about logos, this is about the people you employ. So in a simple sense if you just 'parachute in the Brits' – this isn't what you want – you need to get the right balance between locals and ex-pats ...on balance I think we're getting that balance right....But you don't want to be complacent – reputation is very fragile thing.....It's a bigger deal for us to be seen as British than it would be for the UN where their issue is more about cultural ineffectiveness – I doubt that it's really about country-origin – but it is about 'authenticity'

Participants explain the tensions and trade-offs that exists for Oxfam in competing for resources for its own organization and projects but also working in coalitions to achieve broader goals and objectives – for example when Oxfam is part of the DEC, each NGO has to 'subsume its individual branding' – and the need for each NGO to play to its strengths within the coalition:

Alison: You see the other thing is that we work in coalitions all the time – it's not like the competitive world ...and yet with the best will in the world it's still a fight for resources – we all compete for resources...this is one of the tensions that exist

Daniel: The DEC is very unique here in Britain – - there is a very tight set of rules – when we go to the public we all subsume our individual branding etc - it's very powerful for the donor community – 'these guys are not wasting all their energy fighting over who gets it'There is always that last bit of doubt where somebody will run away with it.....so there is need to spend a certain amount of time about 'table-manners' . We do a Power

Analysis and it takes time and it's a proper piece of work – Oxfam might have better access to the UN for example but Greenpeace might have a better relationship with the governments of different countries... Very often there are conversations about 'table manners' that are quite feisty – if the only purpose a coalition serves is 'lower-common denominator' – then there is no point – so occasionally you need to flex your muscles ...

3.1.2. Balancing 'Hearts and Minds'

This sub-theme explores how the sheer amount of factors is then filtered through the rational and emotional lenses of the Oxfam decision makers - including both its paid employees and voluntary members from the shop-workers to the Board members. As part of this, the decision-makers also try to make sense of the rational and emotional requirements of external stakeholders from general public(s) to funding bodies to in-country partners to family members.

Rosemary: In the U.S – the discourse is very polite and very party political – people don't like when we get angry – it's the same in the U.K – they don't mind if we are passionate - but any time we stray into anger – they don't like it. They are just sick of the negativity – people say 'Charities are just out to spoil your day''Oxfam makes me feel bad'In a Northern country – it's different – and we react differently to a beggar in my face ...in Southern countries [there is] much more empathy ... they have a nuanced view – they live with this every day.

Participants explain that it is cultural challenge for the Oxfam organization to balance emotional and rational aspects within their own decision- making. Sometimes the passion and emotion of employees can make it difficult to 'hear' the responses of the general public. Sometimes, Oxfam needs to over-ride emotional impulses to act in the 'right' way – in terms of morals or management. Sometimes an over-reliance on analysis can hinder Oxfam's ability to engage with stakeholders emotionally. In terms of employee motivation, over-reliance on individual passion can mean less focus on management and incentives:

Rosemary: Brand is such an emotional thing and everyone thinks they know how to do communications...[I have to explain to people here] 'This is research – this is not me telling you – this is what something somebody from the public actually said' – I tried to get every senior manager to go to focus groups...

Daniel: In the last decade or so, we have made a conscious decision that has been widely communicated- that ethically we do not want to go down this route of showing victims – at a senior management level – this puts more pressure on the Fundraising department.....Preferably we do not want to resort to it – we are not shying away from using emotion and passion but the value of a person and the integrity of a personality and our fundamental belief that all human life is of equal value means that we do not want to portray beneficiaries as victims...

Rosemary: Part of that review with McKinsey, we pulled out of Oxfam 'Fair Trade' branded products because we were holding back the fair-trade market – so by us letting go and saying to them you're going to have to find new markets – it was difficult for our Ethical Trading division – because they felt we were abandoning them [Fair Trade]... but we were setting them free... it was very emotional and continues to be emotional.....

Sarah: We're a little bit intellectual – we need to talk more from the heart – bump it up a bit.

Valerie: The Trustee Board are decent and keeping overheads down – they are very functional and functionally focused but they don't always understand motivation – just because people are passionate, it doesn't mean they don't need to be managed or motivated or incentivized...

Participants talk about the challenge of 'making sense' of their personal decision to work for Oxfam to themselves and their family members. For some participants this has more rational aspects – explaining the exact role that Oxfam plays in the world, for others it is around 'being the biggest and the best', for others still it has deeper emotional and ideological aspects around the implicit beliefs of Oxfam and the balance between voluntary and professional work identity:

Sarah: We have the tag-line 'Working together to end poverty and injustice' - it's hard to get people to understand what we do, even my husband...- .people think we must be something about food ?my goal is to get people to understand the right view of what we do . – the best we've ever had is 'Teach a Man to Fish''

Emily: Generally people [in the region where she works] don't know Oxfam – I travel a lot in my job and I always have to go through Miami airport and I always get asked 'What do you do? Who do you work for? What does Oxfam do?' - and the type of response I give - because I absolutely hate those guys in Miami airport - is 'We end poverty' ...'

Paul: [My decision to join Oxfam] was very much at a 'brand' level – I want to work in this sector? Who can I work for? Oxfam? I didn't really look at any of the others. I was used to working 'for the biggest and the best' and I probably felt that I would want to work at the 'best' NGO...[I] was probably drawn in at a brand level....

Rosemary: My father is a right-wing Republican — he jokes with his friends that 'I work for a communist organisation' – when I worked for Campaigns – he thought I was going to get thrown in jail all the time.....- so when I talk about Oxfam... [I explain it to him as] 'helping people to help themselves' and 'up by your bootstraps'

Claire: My dear old grand-dad said to my Mum – how could she afford to buy a flat? – surely she is not being paid working for Oxfam?

3.2. *'Divided Selves'*

This theme discusses how these brand –decision makers see their stakeholders and the relevance of the Oxfam brand to various stakeholders, particularly recipients who are at 'the sharp end' of Oxfam's activities. There is a question about the psychological separation between 'stakeholders' and whether the chosen approach to brands and branding is resolving tension or creating additional tension. Underlying this debate, there is a lack of agreement as to whom branding ultimately serves and whether it is balancing the needs of external stakeholders, with the needs of the Oxfam organization, appropriately. At a deeper 'framing' level, there is a question around the role the brand does and should play a strategic cohesive role in uniting all stakeholders around rather than simply an instrumental or tactical role appealing to donors for 'funds'.

Here the participants debate the unifying aspect of branding as they consider the psychological 'separation' of different stakeholders regarding 'branding' and what they need from the brand. This separation or 'division' is discussed in four key sub-themes: (i) *Inside – Out?* - where they discuss the lack of common-mindset between the general public and people who work in Oxfam, and in particular the mindset of Oxfam volunteers who are generally opposed to spending hard-earned revenue on 'branding' exercises (ii) *Outside –In?* – where participants debate the relevance of the Oxfam 'brand' to recipients – is it inappropriately hegemonious or simply part of recipient-accountability? (iii) *'Same but Different'?* – where two participants debate

how well the 'global' positioning fits individual Oxfam's national situation and crucially (iv) '*Part of the Problem or Part of the Solution?*' where two other participants debate the role of 'brand' in the context of power-dynamics between stakeholders – does brand *resolve tensions* and create a bridge between stakeholders or does brand *create and compound tensions* between stakeholders by contributing to Oxfam 'dominance' versus partners and beneficiaries?

3.2.1. Inside- Out?

This sub-theme looks at how the participants see themselves versus the general public and whether there is a common-mindset which unites the 'rarefied' Oxfam employee with the general public. Within the Oxfam organization there is also a clash between volunteer priorities and managerial priorities and this comes to life with regard to the issue of 'investing' hard-earned revenue in 'branding':

Rosemary: People here think they are part of the population – but they're not – they're a passionate group of individuals who care about development... so clearly they are not the same as the general public ...it's taken us a long time to get some of our senior management to understand this.

David: Generally in Oxfam, we feel ourselves [to be] representative of society – and in reality –we are a rarefied group....the issues that we spend time discussing are invisible to the supporters.....[internally] people kind of want to return to 'a better world programme' – but it is very much 'out of sync' ... with how the public see us....

Daniel: Volunteers are an issue, because we have no direct control of them and there are lots of them, –... our volunteers range from juvenile delinquents of 20 – 25 years to old ladies 'looking for something to do' ... who see their mission as 'maximising income for Oxfam' not as delivering on 'empowerment'.....

3.2.2. Outside – In?

Participants disagree as to the relevance or role of the Oxfam brand to recipients. Is it merely 'background' or does it act as a 'beacon of hope'? Is the mere presence of a 'logo' an act of post-colonialism or can it be understood as a positive mechanism of 'accountability' to recipients? Here, Alison, Claire and Emily

outline perspectives on the relevance or irrelevance of the Oxfam 'brand' to recipients.

Alison has a view that the brand can be consistent with recipients but it does not have the same 'weighting' as other stakeholders:

Alison: Well it doesn't have the same intensity with all your stakeholders – by the time you get to the 'sharp' end of what we do, it's more of a 'water-mark' (to signify quality or integrity)..you don't want beneficiaries with Oxfam stamped all over them – it's not 'empowering' – so if you come from a commercial background you have to re-think and recalibrate your own understanding of Branding – its more of a 'water mark of quality' to help people trust you – if for example people see 'Oxfam' on a water-tank (at the delivery end) – it means the water is good quality – it is not going to kill you - but it is a powerful thing to say 'This is okay and safe' – when Oxfam arrives , at least the water is safe.

Claire broadly agrees and argues the relevance of the Oxfam brand depends on the context – sometimes a 'beacon of hope', sometimes 'nothing':

Interviewer: How important is the brand, on the ground?

Claire: Lots of anecdotal stories and some personal experience. It's almost a 'beacon' on the ground – various cows called Oxfam – the beneficiaries had painted the Oxfam on the car so that the police wouldn't stop them and ask them for bribes..... In other cases, people will never have heard of Oxfam – I went to Senegal – where there is a woman's group working with loads of women – Oxfam is just in the background - so sometimes it is a beacon of hope – other times it means nothing...

Interviewer: But I doubt it meant 'nothing' – they knew you were 'something' – maybe the World Bank or the UN or some sort of funding, facilitating mechanism?

Claire: An interesting way to think about it ...

Emily has a different view – she feels the organization can over-state the 'power-dynamics' of interactions in field and sees a potential role for the brand as a mechanism for accountability to recipients:

Emily: I think and this goes back to the conversation I was going to tell you about. Jeff

Smith [very Senior Oxfam person] was [visiting in the field} a couple of weeks ago and we went to see some of the livelihoods work we do here – we were looking at the water bladder there – and Jeff pointed at this ... and he said ‘That’s my problem with Aid – its all a competition between the NGOs to get visibility and tell our donors that we’re here’ and I actually disagree with him – because I feel that the main reasons for visibility in humanitarian contexts is accountability to your beneficiaries ...

3.2.3. Same but Different?

There are different views as to how similar or different the Oxfam affiliates are to each other – in terms of their history and the competitive and cultural context in which they operate. Here Daniel and Sarah represent those different views, which probably reflect their different roles within the global process as well as their personal and cultural orientation:

Daniel: Our positioning as a ‘practical visionary’ – we have had more fights about the design and ‘look and feel’ of the brand than we did about the basic positioning – the reality is the intention of the 15 Oxfams is very close together and we come at this from a very similar type of thinking..

Sarah - we’re talking about justice on our website – and we’re hearing it back in a good way.In the U.K they have a different brand –problem - [they are seen as] ‘Old and Stale’ – in [this country] we don’t have that problem – nobody knows us – and the people who know us are more sober –If you look at ‘cheeriness’ on a scale of 1 – 10 – we’d want to stop about 5. In the Southern countries (like Brazil and India) – the brand identity might deeply resonate, but this is where having donors and recipients in the same geography is a problem – I don’t know how these countries will adopt this – I feel this new identity is based on these new countries.. How can we create an outreach campaign [in this country] to express our identity/struggles in a way that is different from 20 other NGOs? We are ‘expert’ [in this country]- so too much ‘cheeriness’ is not appropriate. We briefed a few agencies on the Grow campaign and each of them came up with a campaign that was really dark and edgy - as my grandmother used to say- ‘If three people tell you that you’re drunk - ‘lie down’’

3.2.4. Part of the problem or part of the solution?

The potential for brands and branding to unite stakeholders is debated below drawing

on testimony from Claire (who believes a brand can resolve any tensions between stakeholders) and from Susan (who believes that branding Oxfam is creating tension and consolidating 'distance' between Oxfam and its partners in the field):

Claire: When people ask me what is the difference between working in Oxfam and the private sector I say this is the biggest one for me is that when I worked in XYZ, we would run the message which would have most traction with the general public /consumers – but in Oxfam – we don't always have that luxury even though we know that the messages to get most money from our audience ...our agenda is dictated by what's best for people in poverty and not what people who give us the money want...we rely on them absolutely but we can't be guided by what they want ..In terms of stakeholder alignment, there is potential for them to be massively 'out of sync' and I suppose the role of the brand is to try and resolve that tension...

Susan: The tension is – what I just delivered is quite complicated– if we want person X to give us money – a lot of our communications and brand is about us – it puts us in the centre, which is really problematic – I don't know how to square that circle – and in the rest of the world, we take a back seat- if we puffed ourselves up we wouldn't have anyone to work with –There is a real tension about the role of the brand – we need in other countries to have gravitas etc but not to take the limelight - whereas the brand here is about keeping it attractive enough to get cut through and to convince people to give us ... [the money] rather than XYZ.. but in other countries we don't need to be ' front and centre' ...but sometimes some countries will say we do want Oxfam 'front and centre' because that will give us more impact – and sometimes we disagree – and people here will sometimes say [that] in a country like Nigeria - it is better to front Oxfam to keep the government in check.....and maybe it is....It's just different in different countries but it can be consistent – it's hard to fix it in a slogan and image ...

Interviewer: True to every Brand perhaps?

Susan: Although Coca Cola manage to do it ..

Susan then goes further on how she sees branding 'as part of the problem' for Oxfam and the power-dynamics with its partners in the field, when she says:

Susan: Oxfam don't want to 'sell' the structural causes' of poverty ...they want to 'sell' Oxfam as 'creative visionaries'When I first joined – Oxfam was much more a 'channel for others' – now we focus much more on our voice and power, versus enabling other voices and power...- we still do that but its more about us than others – I'm exaggerating to make the point....but the balance has shifted...It only involves trusting us – we don't have to trust others as much. If the partners in other countries saw what we do – the distance – the limits of identity end up being stretched.....'

3.3. Cultural Legitimacy of Brands

This theme discusses the role of brands and branding as a sub-culture within Oxfam around three sub-themes. In (i) *'Hero or Villain'*, participants discuss the historical rejection of the concept and language of brands in the NGO world and whether that cultural resistance is still a factor in Oxfam today. In (ii) *Integration or Assimilation*, participants discuss the value of consultative process, professionalism and the incorporation of 'private sector' people and practices in 'integrating' brand into the main Oxfam culture. However the participants also note that these factors can back-fire if the balance between them is not right, and this can lead to 'brand' being 'assimilated' into the culture, without being truly 'integrated.' Finally in (iii) *Theory of Brand*, we get to the heart of the matter in the underlying assumptions different participants hold about 'brand' and 'branding': what it is, how it works and ultimately who or what it serves within the broader Oxfam agenda.

3.3.1 *'Hero' or 'Villain'?*

This sub-theme explores the sense that 'brand' has been on a journey in terms of being seen as legitimate language and use of resources within the culture. For some participants, the rejection of 'brand' (the 'b-word') is in the past but others still find resistance to the language and practice of brands and branding within the present culture of Oxfam. Whereas the language and practices around brands and branding have gained acceptance and acceptability within Oxfam, there is still some entrenched resistance to 'branding' from elements of the culture. The resistance to 'brands' is traced to a number of factors within Oxfam and NGO culture: a dislike of 'selling' or 'competing', an opposition to 'persuasion' or 'manipulation', a reluctance towards 'spending' on 'ourselves', a distrust of 'simplifying' our identity and/or a fear of being 'held to account' by funders, recipients and the media:

Alison: When I first arrived, 'brand' was a dirty word – you would be 'hung, drawn and quartered' for it. In the NGO world, it was seen as commercial language and language like 'exploiting your brand' didn't fit with the culture.

Claire: Very early on in my Oxfam experience, I did a workshop on 'brands' – the facilitator said 'what comes into your head when you hear the word 'brand'? – people started saying

Coca Cola , Nike sweatshops , evil ...and I'm sitting in the corner thinking 'Oh my God – what have I done? '. Very different now you wouldn't get that type of reaction to the word 'brand' now ...it's a different place..

Interviewer: You wouldn't?

Claire: Well you might if somebody joins here in their first week – but not in general ...

Rosemary agrees with Alison and Claire but argues that there is still resistance to 'brand' in parts of the Oxfam organization:

Rosemary: Brand used to be a dirty word in this organization...Oxfam is such an interesting place – organizational culture wise – you won't hear it in head-quarters you'll still hear it in the field or when some countries come over – you think 'are we really still having that debate?'

Paul expands on the on-going debate between 'brand- as- hero' and 'brand –as – villain' when he describes the workshops he runs and the underlying world-view that he believes drives some people's rejection of 'all-things marketing', using a reference to a piece from Bill Hicks, the American satirical comedian:

Paul: I do this 1.5 hour presentation for people joining Oxfam: 'Brands are not just Tesco. We have one whether you like the b-word or not'I think you get more of a problem the further down you go and the further away from marketing you go, you get that [attitude of] 'brands are grubby things we shouldn't be getting our hands dirty with'

Interviewer: 'Is this Naomi Klein [author of brand critique, 'No Logo']?'

Paul: Not really- that [Naomi Klein] was quite niche. It's more the natural aversion to all things marketing – its the kind of Bill Hicks thing 'if you work in marketing – kill yourself now' ...I think its more that 'day-to-day' rejection of 'all things marketing'.....People think you can't be a charity and a brand ...and of course from my point of view you can ...'

Interviewer: How does the experience of doing these kind of things [workshops] with NGO people differ [from doing workshops with non-NGO people]?

Paul: The level of cynicism is probably a couple of notches higher [in NGOs]. Cost is a massive issue – how much is this going to cost us? Great but how much is it going to cost? How much is this going to save us? You have to be way way more accountable. ..I would

imagine more so when it comes to the global identity that's going to be even bigger because we've only just done Be Human Kind [the previous branding exercise] and also it's not coming from 'here' [countries in the field], it's coming from 'over there' [Oxfam House]....Maybe because of that cynicism – there's less just passive acceptance but probably I mean in a good way.....I can imagine hauling my cookies around Unilever and saying 'we've re-branded Unilever and getting 'Huh! ...whatever'.. whereas here, you won't get that – you'll get engagement and some of that will be negative and some will be positive but you'll get a reaction...

Some other participants outline their view on the positive benefits of defining a global brand in terms of shared coherence across the confederation, using this global brand to engage with global stakeholders to create long term investment and long term support and becoming more decisive as an organization:

Alison feels extremely positive about the global identity and its role as impetus for the organization to behave as a 'global movement of change':

Alison: We need our Global Identity to help give us a bigger share of Income and of Influence – which are somewhat linked.....We need to become less Eurocentric [in terms of orientation] and definitely less UK – centric [in terms of both orientation and investment] – we need a broader constituency beyond the U.K - we need the global Brand to help pull the confederation together, listen to the South and reflect what we're like and make a strong new identity more global, less corporate and less North- we need to be really multicultural and employ more Muslims, NOT be a white Christian, North organization – we need to move from the U.K to being a 'global movement for change' – not just Brazil and South Africa but rest of Africa and Asia..

Interviewer: Will the Global Brand Identity lead or amplify behaviour change?

Alison: Good question. First of all much of the behaviour change has already happened. There has been a structural alignment in each country and we are building around programmes first... - it would be good to talk to the affiliates – maybe Oxfam America, Oxfam Ireland, Oxfam India – to see how the affiliates feel the process of the Global Brand Identity has gone

Valerie feels positive about the concept of 'practical visionary' and sees the brand as 'guinea-pig' for the operationalizing the new global organization:

Valerie: From an international Oxfam perspective, I am positive about it [the global brand] . Just think we have 15, 17 affiliates and we have always had the same logo but we all knew there

was an awful lot of difference between us ..In terms of Oxfam GB – we already have a perfectly good brand – why should we change? – so messaging internally will be key – is it cost effective for us or is it a symbolic thing for the whole organization? The Brand is a guinea-pig for the new organization....

David sees nervousness about putting investment in the brand, which he traces to lack of decisiveness within the culture:

David: 2008 and 2009 – we went through a major cost-cutting exercise – we took the easy way out and cut back on communications – we have cut back far too much in the last few years...Charities like Save the Children are spending more – we have cut back far too far – trying to be too clever – we have lost support with our supporter base.....We have to think about how to ‘frame’ resource constraints....My view is that the key challenge facing us is our net loss of supporters and we need to do everything we can – advertising , telesales – whatever works in getting on in a more challenging world ..This is an internal choice – nobody would criticize us ...

3.3.2. Integration or Assimilation?

In this sub-theme, some participants talk about the successful integration of ‘brand’ into the Oxfam culture as a result of wide-scale cultural participation and consultation, increasing professionalism and deliberate recruitment from the ‘Private Sector’. However, there is a need for balance within these factors if ‘branding’ is to be integrated into the overall culture rather than merely ‘assimilated’ at a surface level: too much consultation can undermine the professionalism or ‘expertise’ of the marketing sub-culture, too much focus on the ‘private sector’ can raise questions about the underlying appropriateness of ‘brands’ and ‘branding’ for the NGO sector.

Rosemary highlights how a participative process ‘brought the culture along’ with the ‘Brand’ project:

Rosemary: [There is] this full body of passion in OxfamThey hate the advertising campaigns – guaranteed - because they don’t speak to them...They hated some of the [historical] advertising [because it] was ‘pseudo diversity’ – it felt very slick and not rooted in what we were– people were like ‘what is this for?.... It got mocked at the Christmas review and all of those things that happen within organisations – we did a series of workshops and

explained to people that this is the problem – what do you want this brand to be? I did a lot of senior workshops with people. I took photographs and cut them out and stuck them up – and people were so uncomfortable, but we did it anyway-..... People felt they had been heard..... We figured it out – between Janet and Paul, they did the same presentation 70 times ... and then they went back when it was agreed and then went to share the results... That just knocked on its head the whole discussion ‘Brand is a dirty word’, ‘Brands are something that corporates do’.

Paul expands on the importance of this ‘consultative’ process and how it allowed brand to ‘come from the heart’ of Oxfam and the implications for his own role as an ‘internal evangelist’:

Paul: Going back to the ‘internal evangelism’ - before we went and did this work – we went around the organization and said ‘We think we’re ‘this’ and [other] people think we are ‘that’ – and that’s a problem..’ We gave people Pritt sticks and magazines and poly board...and we said to them – You do a mood-board of the Oxfam you would want to see’. Everybody from X [the Oxfam CEO] down said ‘we have lost our fizz...our edge’... So when we came back to the organization with [the brand work] –it was because we had done the ground-work, on a tactical level, it felt like something that had come the heart of Oxfam – it wasn’t just a veneer – let’s just slap this on... The catalyst of... the ‘brand refresh’ meant my role had to change – I had to be the promoter of the brand- .50% of the work –and I never would clocked this beforehand -more than 50% of the work was ‘internal evangelism’ and buy-in..

Daniel sees a consultative process as crucial to the success in designing the new global organization and global identity. This ‘co-creation’ and working partnership replaces the previous relationship with countries as ‘opportunities for ‘case-studies’:

Daniel: One thingthat I would single out as a big change process in the organizations that we are very proud of – is the role of our country programmes and the voice they have our decision-making and how we shape and co-create our overall strategyit is very impressive how much time we spend with the programme people on the ground – listening to them, debating with them – when our international division present their plans – it is very clearly vetted by the people on the ground. The global campaigns had a bit of a reputation as being aloof a little bit removed from this and had had an attitude [towards the] countries as ‘opportunities for case-studies’ – but it has come a long long way – and the new global campaign has been -I use this term- ‘co-created’ with the people on the ground and therefore we’re much better placed than a smart policy officer in Oxford to design that plan ...and I find that very empowering and it gives us that authenticity as an organization...

Interviewer: Do you get enough input from the rest of the organisation into brand decisions?

Daniel: Yes. We do. We wouldn't dare start anything that was perceived as a top-down thing. There will be critics and there will be critics internally and 'why are we even doing this?' Paul will be briefed to run an internal programme on what the new brand is and what 'practical visionary' means to them – before we start talking about logos. In something like the global-re-brand we first of all need to explain to people why we are changing and 'why' instead of 'Be Humankind' – we need to talk about 'the Why' before we talk about the 'font' [the 'What'] – the danger is that people just concentrate on the latter and how much it will cost? This is the tension you get in an organization when people are really passionate - lots of people who bust a gut to 'save the pennies' for Oxfam? We are going to spend on this – we need to do it.

From a different perspective, Sarah challenges Daniel and asks whether this 'consultation' was ultimately democratic or did political power over-ride participative process?

Interviewer: What has the process been like?

Sarah: Well being Oxfam it had to be negotiated, collaborative, participative – so if you're asking me if it was smooth? No. Challenging? Yes. In all of the Oxfams, there has been the phenomenon of hiring outsiders into communications marketing – but then you just over-ride all of their decisions. The Global Identity Team is comprised of communications professionals but their decisions are over-turned by the Executive Directors. It was 'classic' and pretty disturbing 'Not Invented Here' and objections and concerns were being ignored by the process. Those who had the political power ignored the other communications professionals. So there was one set of deeply collaborative conversations and then decision-making in another space.....NGOs are really the same as all organisations. Same process, structures, environment – its very familiar to me.... The idea of 'experts' is familiar to me because I have always worked with experts in [other sectors] but sometimes I do not feel that there is enough value of marketing expertise in Oxfam – everyone can and does have a view...

Daniel agrees with Sarah that it is important that 'professionalism' underpins the value and 'expertise' of the marketing –sub-culture within Oxfam:

Interviewer: I'm very interested in this 'professionalism' – it requires you to be a bit better than just having good ideas – doesn't it?

Daniel: Yes (*laughs*) Yes – this change process we're going through in terms of one affiliate being in charge of communications – these are the types of conversations you end up {having}....One of the interesting conversations is around 'what standard of professionalism

should be in place? There are personal differences, national differences, ideological differences - one of the straightforward ones is how you harmonise your pay structure - but how to drive media strategy is a 'softer' conversation - you build on an individual's view -point and it's a lot more individual and ideological to some extent - so whereas we believe in the strength of diversity - there will come a time where... there will be a certain story or picture which is unacceptable...

For Rosemary, professionalism is linked with deliberate hiring people from the private sector although she recognizes the importance of balancing private sector experience with NGO reality:

Rosemary: That's what been driving Oxfam for the last few years - the rise of professionalism - we never recruit from other charities - people are nearly always from the private sector - and that's seen as a good thing - part of professionalizing what we do

Interviewer: It's okay to have that 'private sector' vibe?

Rosemary:it has to be looked at as 'its not a bad thing as long as it's done in the right way' - the private sector is not a 'bad thing' - we've had regional directors who have come from Nike - nobody had a problem with that - but when you get closer to the field there are core skills needed... You also find it hard to get development people.... [who are interested in marketing]...

Interviewer - is there a danger that the Private Sector people try to 'dominate' as brand-experts?

Rosemary: When people come in - we make it clear - 'we want you for your experience but if you're going to be effective with us - you're going to do some listening as well' -Oxfam is that type of culture - no one person is going to change it ...

In a separate context, Daniel has found that referencing the Private Sector as an 'analogy' can be a double -edged sword in the NGO world when trying to 'sell' the value of investing in brands and marketing:

Interviewer: Can you use the parallels with the marketplace - e.g M&S spending money to update their shops etc?

Daniel:It can be a double -edged sword ...I did do that when we did (re-branding) in (another NGO) on a number of different levels. It [got] very confrontational - but we got there in the end.....

3.3.3. *'Theory- of- Brand'*

This sub-theme explores the crux of the cultural battle around 'branding' through listening to the explicit and tacit assumptions of the proponents and critics of 'brands' and 'branding'. Talking with the participants and reflecting on the conversations starts to build a picture of conflicting 'theories-of-brand', between the participants themselves and also between the marketing sub-culture and the rest of the organization. Three separate but connected debates emerge: first, *what* is 'brand'? (is it merely 'logos' or does it include organizational behavior, what Paul calls 'walking the talk'), second, *how* is 'brand'? (is it imposed from head office or is it created from the 'empowered' country back?) and thirdly and most importantly, *why* is brand? (which stakeholder does it serve in practice? What are the implications for dynamics between stakeholders?). This connects us to the world-view of different participants – how do they see 'brand in the mind'? What assumptions and motives inform their 'theories- of- brand' and how in turn an individual's 'theory – of - brand' helps or hinders their 'theory – of Oxfam'.

Daniel expresses a view that at a fundamental survival level, every NGO understands the importance and value of 'brands', as 'their daily influencing and power' and source of 'daily bread'.. This is an interesting perspective when it is contrasted with the commentaries that follow it, which discuss the resistance and confusion around the role and purpose of brands and branding within Oxfam.

Daniel: All NGO's, no matter how large or small or what sector they work in, understand the power of communication – that's their daily influencing and power and creating a brand positioning is their daily bread and a lot of them punch above their weight - in terms of getting more impact with few resources and innovation....

Daniel and Paul then talk about the difficulty of getting the organization to accept a 'theory of brand' around brand-as –behaviour or 'walking the talk':

Daniel: Well in Oxfam, as in XYZ [where Daniel worked before Oxfam] there is a 'cultural tension' between the professional marketers- our affiliates are 15 Oxfams who all sit in rich countries- versus the people 'in-field' who all understand how to manage [the brand] (*sarcasm*)...for them it is the 'logo' - they feel that more branding means more logos.....It

can be hard to get people to engage with 'the brand as behavior'... although I always say to people in interviews 'if you come to the conversation as Oxfam – the secretary general of the UN is only a phone –call away'... Oxfam as an organization has the highest respect in the field....

Paul: You can sit in a room and write your values up but unless you go out there and 'walk the talk' – people will just think what they want....Partly justifying my own job but also showing people that Brand is a 'live thing' that you have to mind.....it's an animal that you have to feed and tend and keep it's coat shiny...

Rosemary talks about the challenge of getting people to 'sign up' to a common view of 'brand' and in particular how to balance the 'imposition' of 'brand' with 'values' of 'empowerment'?

Rosemary: There is a real lack of understanding that a brand drives culture and who you are and behavior and communication – HR think they own the values it's a classic case of NGOs – NGOs do not like to be held to something – to reach agreement and consensus and make a decision - they would prefer to paste over the cracks - and say ten different things...

Interviewer: Is this the same issue as in all organizational cultures- a trade-off between 'empowerment' and 'imposition'?

Rosemary: You have greater tension when one of our values is 'Empowerment' – so where does 'Imposition' fit? We still need to be able to come up with a norm: What does 'empowerment with accountability' mean?[In] Oxfam – we hate process, we hate structure... everything is done on personal relationships and corridor conversations and that makes it very hard for someone coming in Everything has become more professional but it still takes a while to see how things work and it's hard to get your head around.....It does effect the reputation and the brand – if you're not aligned you create reputational risk ...

Interviewer: But [the level of brand understanding] is pretty good?

Rosemary: But what is it that we do? What is our role? We think we have a USP [Unique Selling Proposition] but we don't have one – not in the true sense..... We had a really interesting issue on our effectiveness indicators – Mary just said to me – this USP thing that keeps coming up – couldn't you just write something? I said do you really want me to do that and tell you what are you about?Then we had a management team thing and we went and fudged it all – we love grand statements – How do we make the visionary practical?The 'Frames and Values' [report] is a very good example – we all understand it but how do we operationalize it ...

Susan expands on different ‘theories- of -brand’ within the organization and how they have the potential to conflict with one another – especially as branding moves from ‘rhetoric’ to ‘reality’:

Interviewer: How do the understandings of Brand differ in different parts of the organisation?

Susan: I suppose I would say ‘what does Oxfam stand for?’ and the reason that is important is from a reputational perspective – we have lots of stakeholders ...lots of government, lots of NGOs ...very wide range of stakeholders – so from a reputational perspective we have to protect ourselves so we don’t get thrown out – and also our staff we don’t want to put them at risk because people don’t understand why we are there...And the other side would be ... ‘what do we stand for?’ so that local organizations who want to make change happen know who we are and that they can work with us – and even big business – for example, we may want to work with Shell in Nigeria – even if our values and long term objectives are very different we may see them as ‘key change agents’ – they need to know that we’re trustworthy, good at what we do....’not loonies’ and what our values are and so on and so on ...

I guess that [for me] would be what brand would be:..It’s not just what we stand for but who we are – our identity as a campaigning organization..is very important as well as long term change and crisis stuff -And at the same time, a kind of shiny professional commercial global brand isn’t always going to go down very well – we can look as much as a multinational as Shell ...

Interviewer: And if that was a problem, who would it be a problem for?

Susan: You’re going to get a different answer to that – depending on whom you talk to in Oxfam. It might be a problem with local communities – the more politicized ones – it might be a problem with Dfid or other NGOs – you’re spending a lot of money. It also might be a problem because it has to be adapted so it makes sense in the local context – the wording, the imagery – how do you do that with one set of messages? The key issue here is what is the purpose? What are we are trying to do and how can the brand help us? So I guess my question would be, on behalf of my programme staff, how can the brand help them do their job better? What is it they need in their day to day job around ‘brand-type’ things to help them do their jobs happen?

Susan then goes on to argue that the ‘brand’ tends to ignore the people in the field and seek to ‘impose’ itself on them. She asks critical questions around the ‘words’ and ‘language’ of brands and branding – whom do they serve? To whom do they seek to appeal? She raises the issue of ownership of ‘brand’ between the ‘centre’, the country offices and the geographical ‘regional’ headquarters:

Susan: The people who are doing this [running this Global Identity project] need to spend some time in a country office – their key relationships are with the regional centre not with Oxfam House. I've had a chat with Daniel and I've asked him 'what do we mean by 'rolling out the brand' – when I'm in the field, I forget Oxfam House is there – and when I'm in a regional centre, I also forget Oxfam House is there and when I'm here in [Oxfam House] I sometimes don't remember the countries are there because the regional centre sometimes subsumes the country's own identity... It's going to be very difficult to impose a brand on people – especially if it doesn't meet their needs

Interviewer: What about the whole 'Practical Visionary' identity? Do you think people can get their heads around the words?

Susan: Yes – they can get their heads around them and they think they're [rubbish]. These are all U.K words – they need to know what are we trying to achieve? What are our goals, our strategies and what do they need to do to get there? They did some sort of 'global' research but I think it was really a middle-class audience in South Africa and Brazil and why did we do that? We're not fund-raising therewhy would anyone ever choose to use these words? If the language is useful – they will use it but not because it is the global brand..... They [the country and regional people] are not sitting there waiting for someone here to come up with 'the words and the picture' – they are just getting on with it ... Who are these words for? Who do we have in mind? Whenever they say they want to do something? I say 'who are we talking about? Are we talking about the wealthy elite in Rwanda, marginalized groups, progressive government in Chile? Are we talking about the U.K.? Normally they say Yes but sometimes they say 'global' and I say No – you're talking about the U.K ..

Interviewer: If I am in X country, is there any value to the country that I'm Oxfam as opposed to anywhere else?

Susan: Yes – but the value will come from the reputation of X itself...of the staff in that country..... We are all very proud of being from Oxfam – if I go in and nobody has heard about it – I'll explain who we are and I'll choose the words to reflect that context...if they say 'We already think Oxfam is fantastic' – I'll say Why?' and normally it will be because of one person, some might talk about a campaign, others will talk about 'grants'We are very different from World Vision and from Dfid but I don't think that's captured by words like 'practical visionary' – but to be frank I'd be very surprised if people in here don't know that you can't really do it – its impossible.....What will be important is what we do, not what we say.....

3.4 Underlying Relevance of NGOs

This theme highlights the pressure on Oxfam to justify their existence at all levels and to all audiences. In (i) 'Under Siege', participants discuss the complex issues of effectiveness and accountability: how far has Oxfam come? How much further does it need to go? Do the benefits justify the costs? In (ii) 'Managing Expectations?', participants discuss whether they are meeting or not meeting the expectations of the public and funders and different perspectives on how Oxfam needs to deal with 'other – expectations' better. Finally in (iii) 'Becoming', participants discuss where Oxfam is going and needs to go – how is Oxfam dealing with the broader 'Aid' debate? Is Oxfam relevant in terms of what donors want? Should the programme incorporate donor countries and allow 'charity to begin at home'? What is Oxfam's role moving forward and what does this mean for Oxfam as an organisation? Ultimately is the 'practical visionary' identity that Oxfam has recently adopted, acting as a help or a hindrance in shaping and responding to the future?

3.4.1 'Under Siege'

In this sub-theme, we hear three different perspectives on the debates around effectiveness and accountability and how they relate to Oxfam. Daniel talks about rising to the challenge of effectiveness and accountability and how Oxfam is a leader in both areas and the possible need for 'certification' in the sector. Claire talks about the larger contextual issues that also effect perceptual efficacy like 'African' corruption, sector identity as 'Do-Gooders' and interventionism. Rosemary brings the two themes together, talking about whether and how to communicate different dimensions of effectiveness to all stakeholders and whether different stakeholders absorb this communication on a rational or emotional basis:

Interviewer: Effectiveness as an idea is big – is it equally relevant to all aspects of Oxfam?

Daniel: The challenge is to do it [effectiveness] across the piece. In the immediate interventions you may have a little more lee-way – the reporters will always be looking for the 'chink in the armour' - the one bag of rice that went astray- sometimes that's not very fair but it's something we have to live with.....In terms of campaigning – it is harder to measure power and influence – especially when you're looking at a global movement – but we're spending a lot of time

making sure we are having an impact...The coalition side can be quite hard to measure because it's quite subjective and those evaluations are difficult....The programme side is a lot easier to measure because we have Global Metrics – which are KPI's- and we have adopted 10 or 12 measures including gender – so the regional directors are really 'sweating their stuff' – because we have declared our willingness to being accountable and transparent to our donors...it's all on the data-base and we can see it and share itI think five years ago the language between outputs and outcomes was very blurred – and this was also true in places like Green Peace and WWF – but here there is a real focus on 'impact- evaluation' on everything we do, giving out the levels of activities, levels of spend and what the outcomes are

Interviewer: How do you think you need to address Accountability?

Daniel: Well I think the wrong debate is about '% of funding' [on administration] – we did an experiment in February with PayPal where we said that 100% of donations would go to programmes and nobody even noticed it or picked up on it ... I think being honest about failure is a really important dimension of accountability – Transparency is the best way to deal with failure – we have had two examples recently of where we decided NOT to cover up the mistake – the first was fraud in Pakistan – £200,000 was embezzled and went astray – we made it public and apologized...the second was in Haiti where there was sexual misconduct with prostitutes from one of our engineers – on both cases in order to be professional we needed to be transparent...

Interviewer: So where do you think the '10% overhead' target sits?

Daniel: On balance it is more useful than not, to have a lot of scrutiny around that – if you ignore the small fundamentalist group that want 0% on overhead – it keeps people on their toes – we are being scrutinized on this – people take pride on this – beating this supplier back – renegotiating this contract or that one – these are the type of conversations we will have about the re-branding” ‘they are perfectly good t-shirts – why are we throwing them out? I think we don't have any skeletons in our closets ...

Interviewer - Do you feel Oxfam are unique in [Effectiveness] versus other NGOs?

Daniel: At the risk of sounding arrogant – you will find that- with a lot of the smaller charities, it's not because they want to be there, but they don't have the right resources... A lot of this has to do with putting the right resources in the right place. If you are tight for budget you can't afford to employ somebody to do the risk management ...it's not only the way we run the business, it is in terms of the measures we put in place – so that everything we do stands up to scrutiny..If you are tight for budget you don't have the resource to put all the right systems in place..... I have no sleepless nights in terms of how I would substantiate my case or rationalize my investment ...

Daniel: There is a debate about 'certification' – all the big NGOs are all subscribing to the same standards of humanitarian delivery and we are fully accountable to that – but then in something like Haiti – the church in Minnesota raises \$5,000 and sends two people over to spend it ,,,We probably do need some sort of 'certification' -bunch of agreed criteria – [there needs to be] some sort of 'guild' – a balance between altruism and professionalism..

Claire puts effectiveness and accountability in a larger context when she lists the reservations and criticisms of the public towards Oxfam and the ramifications for Oxfam in terms of the costs of accountability:

Claire: Corrupt African dictators getting all the cash Inefficient bumblng – no impact.....'Do- Gooders' - although I don't know why that's a problem-.....Being 'Political' – being involved in things that are nothing to do with you – if you think Oxfam is all about feeding starving children – then you don't understand why they are wasting their energy on political change or system –stuff... 'Why can't they just get on with dropping in a bag of rice'? And most fundamentally– 'what difference does any of it make anyway?'We've told a lot of success stories over the years but no one remembers them..... ..Accountability has a cost associated with it so we'd better hope it has a benefit associated with it...

Rosemary explains the complexity in communicating Oxfam's Effectiveness in terms of different aspects (short term programme impact versus longer term capacity building), different stakeholders (individuals want stories versus institutions need reports) and different trade-offs (being truthful about the level of corruption whilst trying to contain the perception that development is inherently corrupt):

Rosemary: Monitoring and Evaluation is very tricky – it's very expensive... for example our Dutch affiliates have 69 criteria they need to show success to the Dutch government...'We have set up Effectiveness Audits ..my challenge is how do you communicate that?Really harsh trade-offs between relationship building and capacity building and programme impact ? We're constantly trying to balance all these things - we just have to do the best we canOur strategy is never to say 'we're effective' – it's to say [that we are effective] by doing - and let other people say that about us ...In terms of supporters they need to see the difference their money makes, so it's all about stories – I have a whole team assembling [success] stories.... We do a Credibility Report and that goes to government.....

Rosemary: The other big barrier we get a lot is corruption – I think it's just a barrier people put up because they don't want to engage with us ... The corruption [critique] is an interesting one for us – in terms of how much do we want to talk about that? We do audits on how much money

is 'missing' through fraud etc. It gets very complicated [regarding] how you can talk about corruption in a way that is true. You can't talk about it 'full on' – because it raises the problem for some people - who weren't even aware in the first place? We just say that you raise money and it goes straight through to partners or local government – we don't give it to governments...

Interviewer: Technically there could be corruption in a local NGO [partner] as well?

Rosemary: That's why we do audits ...Of course there is probably corruption in our programme too ..

Interviewer: I can see on a 'systems level' how yes you [Oxfam] are well meaning, but you're putting it through somebody who isn't – so what is the point [of donating money to Oxfam]?...

Rosemary: that hinges on people having a very rational world-view – and that's why it's important for the brand to talk in terms of emotion and truth and that's why you get back to the 'framing' [of development in general] – [you need to talk to] people who see themselves as 'world-citizens' versus people who just think 'my world is myself and my family'...

3.4.2. Managing Expectations?

This sub-theme explores the difficulty of managing the expectations of the public. First Emily, Claire and Paul talk about different aspects of Oxfam and striking the balance between motivating people and being accountable. Daniel talks about the difficulty of dealing with the media 'who see their role as shooting down NGOs' and the challenge that governments face in being accountable to their electorates. Then Rosemary talks about the 'cognitive framing' debate between 'transactional' frames and 'transformational' frames when applied to the role of Oxfam's shops and how retailing activities contribute to the rest of the organization in practical and 'symbolic' terms. Lastly, Daniel talks about the need for the organization to be transparent whenever mistakes happen – he argues the cultural imperative to take the 'fail' out of failure':

Emily: I think we do perpetuate it – we say we can do all this stuff and then two years later we say we can't do that – that's not what aid agencies' roles are? We have to get a lot better about managing expectations....I don't think it's the 'end-poverty' one that's the issue - I'm talking more about the donations that comes at the humanitarian end of things.....We gave the impression that it [recovery in Haiti] was going to happen sometime soon and we all knew it

wasn't going to happen anytime soon, because of the 'Haiti problem' – [As a donor] I need to have my expectations managed... If I gave £20 to the crisis in Hekla- I know it's ridiculous - but I would expect there to be some progress made on famine...

Claire: The Admin issue is big one – because people say to me – 'isn't it true that Oxfam spend 90 pence in the pound on themselves?' - people seem to have reversed [the statistic] and it seems to be a real urban myth.....At least 50% of people are familiar with the argument – but how many actually believe it? This is my impression from watching them in focus group. I'm not sure it's really a rational objection. We've done rational things to tackle it – it's on our web site – but people don't see it because they don't want to see it ..

Alison: Well there will always be the 'Charity Begins at home' argument and also 'It's all about corruption' but they are just excuses not to do anything – should we waste our time trying to alter these attitudes? Or should we take a more positive tack – you can get much more value for your charity donation in the poor world than in the rich one – you can have a lot more impact for a relatively small amount of money – you'd have to spend millions to do the same thing at home...

Paul: 'Poverty' is a very hard concept – people have either very pejorative thoughts about it or they just don't 'get it'and they certainly don't believe it can be ended....That is a fundamental disagreement between us and the public effectively - we would not get out of bed in the morning if we didn't think poverty could be ended and yet most people don't think it can because they believe its just 'in the ether' – its part of the human condition that a certain percentage of our species will be poor and that means if you say 'Let's end Poverty' - unless you have something on the scale of Make Poverty History – you will get laughed out of court... because 'Let's end poverty' is naive.....

Daniel: Somewhere like Haiti, once the dust has settled, the journalists are all loose, rolling around looking for stories, you just need one incidence to report – one camp run by Oxfam Quebec where the water bladder didn't work and there was no water for a couple of days – its all about contextIn the U.K – the media see their role as 'shooting down' NGOs

Daniel: Politics is not on our side at the momentit is remarkable that the British government is still hanging on to the promised level of development funding – we're watching it very closely – that's why we're a campaigning organization. We have started to explore the broader issue of cognitive framing around aid – what would we need to change? ...This 'framing' work is being driven by Dfid – they are funding it – because of course they are very concerned about the public's attitude to these things – as a government body they are concerned about what the public think and want...

Rosemary and Daniel then talk about two cultural challenges for the Oxfam organization in managing expectations. Rosemary highlights the implications of cognitive frames for Oxfam's retail activities – can shops be 'transformational' or are they inherently 'transactional' and how does this impact on how Oxfam comes across? Daniel looks at the importance of transparency, when there are mistakes or human errors:

Interviewer: Thinking of Shops in terms of transactions and how that can 'frame' Oxfam and hold the brand back? Shops are about transactions – that's what goes on in shops – could that whole activity hold the brand back?

Rosemary: This is a real tension in the organization and there are two schools [of thought] We live in the real world – we have to make money – for me the question is 'how we do that?' - you can't just shut all our shops because they are promoting 'transactional relationships'. Half of the U.K public comes into our shops at least one a year – Our thinking is if we can do more to make Oxfam shops stand out from charity shops – but it has to make money, whether it's transactional or not is neither here nor there- How do you get people to understand a deeper relationship between what they do in the shop and we do out in the field.... our shops are one of the most efficient in terms of using stuff properly ... we recycle it onto the Ethical market – using the stuff that we can't sell here... This is a whole sustainable circle... You could argue that Oxfam shops are right at the heart of a sustainable economy – but this is deep-rooted – and maybe people aren't interested in this – maybe we just need to use shops as an opportunity for the brand and the messages...

Daniel: I wouldn't shy away from any journalist or academic on any question – we have an open policy ... feel free to criticize – 'come and get it' - Culturally making more of a failure is still something that makes people uncomfortable – I personally think making a real cock-up on a project is great because you can really learn from it - it shouldn't be swept under the carpet – it's all right we need to be able to get things wrong and I personally think it can be perfectly acceptable to get things wrong and as an organization – getting things wrong – we need to take 'the fail' out of failure...

Interviewer: Is your personal view on Failure, widely shared?

Daniel: Yes – it is widely shared. Yes at a senior level. I can't speak for lower levels in the organization or if you are out 'in the field' - If you're the lonely programme manager who made the mistake – you may not take well to Head Office descending on you to 'learn' from the failure...

3.4.3 'Becoming'

This sub-theme explores the participants' perspectives on whether and how Oxfam is facing up to reality and engaging in debates about its role and relevance moving forward – for example The Aid Debate and Charity Begins at Home. For some participants, there is an acknowledgement that the Oxfam global identity will always 'hold tension' and there is a need to keep a 'work in progress' perspective, continually trying, learning and adapting as the future emerges:

Emily discusses the Aid Debate and her view that Oxfam needs to step into the fray and defend humanitarian intervention at a broad level:

Emily: 'I think a huge challenge is going to be the 'Aid Debate' – how we react to it and how we deal with [it] – I don't think we're reacting to it in the right way – we're reacting on a case by case basis rather than looking at the critique on Aid in general ...I'm not involved in this at the Head office level but from [what] I do know -we aren't having a big debate on this – the Aid Question is a very difficult and complex question...We need to come out much more strongly on our own limitations. We need to have a much more honest conversation with the public?'

Interviewer: 'Do you think the public is able for the honest version of the conversation?'

Emily: 'I'm not sure.....'

Paul and Rosemary talk about the 'struggle' in squaring up to reality and articulating what makes Oxfam different in terms that can motivate a compassion-weary public while Sarah looks at the internal need to 'do the numbers' rather than 'getting caught up with ourselves'. Claire makes the point that it can be really hard to switch from the mode of promotion ('the front foot') into the mode of evidence and evaluation:

Paul: We mustn't kid ourselves – we still face this challenge – you know- if you go into research groups tomorrow – and if you get people talking about Oxfam they you will hear about starving African babies and smelly shops ..Rather than looking for fresh challenges – we need to address the ones we already have and [relevance] is a massive one.....The older we get, the wiser we get – but do we get more relevant? Next year we have our 70th anniversary – great to see it but does it just raise the questions: 'are you a bit passed it now? what have you done and isn't it time you retired?' There are smaller more agile agencies doing things- organisations that make decisions better and faster. If you look at Avaaz -they are just a

campaigning organization but they can turn on a six-pence— it's all supporter-led – they're getting the scale and the gravitas and they still feel very global – they have a vote about things – so that's why you get emails about 'Save the Whale'A lot of this does come back to relevance and suitability to the times...

Rosemary: Where I think we struggle is finding a point of difference - -people have very strong views on Oxfam - so how do we move people on, on that?

Paul: I suppose trying to step back [from] the global identity - what is Oxfam's role in the world? What is Oxfam's role in the lives of people around the world, not just the people we help? That's so bloody hard...I think we have a lot of angst about 'what are we about?' and 'what's our role'? Our remit is so wide: That's a real challenge for us going forward. Which brings us full circle to [the previous Oxfam brand campaign], it was that challenge of going 'God we do so much, how can we stitch it all together' without going 'let's fight poverty' - because if you talk to people about poverty they just switch off - The p-word [poverty] is an anathema.....

Sarah: I have been in Oxfam for two years – so I have a perspective on this world but I maintain an outsiders perspective as well – sometimes we get so wrapped up in our own thing – I believe that as an advocacy and campaigning organization – you can't afford to be caught up with ourselves ...we sometimes believe that the way we do things is better than it is...we need to 'Do the Numbers' ... with policy and advocacy, we get caught up with 'fundars are the way to go' and 'we need to advertise' and I would be asking : is the intervention truly focused and what we need to do? 'Is advertising the best tool to achieve this?'

Claire: Maybe they [another NGO] are so good at being 'on the front foot' that they find the measurement side a bit much?

Here the participants debate whether and how Oxfam should reflect the belief that 'Charity begins at home'. Alison believes that it depends on the absolute poverty level in the donor country, Daniel believes that the U.K poverty programme is useful and gives Oxfam 'credibility' and Paul debates whether poverty in the home-market would have the same emotional appeal as poverty abroad –the difficult concept of 'undeserving poor' at home:

Interviewer: Should Oxfam have a poverty programme in all markets – including donor ones?

Alison: It depends on the absolute poverty levels in each country. We don't need a poverty programme in France – we do need a poverty programme in Brazil – if there are poor people in

Switzerland the duty of care is the State – not Oxfam – the Duty –Bearer in most of the Northern countries is, and should be, the State..

Daniel: Funnily enough we do have a U.K poverty programme with specific programmes in Blackburn, Leeds and Cawley – we use that as a lobbying vehicle and it gives us credibility....

Paul: It's funny you should ask that [whether Oxfam should have a poverty programme in donor countries] – you can see how it could help people 'bring Oxfam home' but then you could just confuse the buggery out of them all? ..The other issue is the 'undeserving poor' –taking the temperature of the average person - even World Aware people – have less sympathy for people in Dale Farm than somebody in the East African drought.....We're having a bit of think and a review on what we should do.....[the advantage of a poverty programme at home is that] it literally challenges the perception of you only feeding hungry African babies – at a kind of sort of philosophical level – we fight poverty wherever it is ...it doesn't really matter what country it is – 'for humanity' – it could be at the end of your street or thousands of miles away.....I would like to explore that more definitely.....

Finally, Rosemary, Sarah and Daniel highlight the fact the global identity will always contain tension ('Which lever will we pull?') and will always be a 'work-in progress', an idea which then becomes reality when it 'happens on the ground', a 'model' which can be a guide for 'seeing through' future behavior:

Rosemary: I think that's actually why you get a lot of tension in Oxfam - there's a cultural dimension to all of this – when you look at the humanitarian side of things – its all about logistics – its very practical – the shops network is very practical – but then we have the whole 'think - tank' – let's change the world side of things ... that [tension is] where the brand is very interesting – the 'Practical Visionary' – there is tension there – which lever should we pull?

Sarah: You can do your thing...its just a thing to be moral – we're very self reflective, we take ourselves seriously – the beauty of key people here is that they want to be part of the mission – but we carry a burden.....People are really working to keep connected – they have a pre-disposition to itlots of sharing the intellectual capital [through] the website – whenever there are emergencies – all hands are on deck – everybody is engaged - people here come from 'somewhere' and we have a personal goal-setting process that we connect to their position – we travel to the field and we have regional offices – all with a very deep set of competitors....We're no different from a law firm [in that 'identity' needs to be backed up with results] – [there were] 90,000 people in Arthur Anderson and 4 people screwed that up...I'm comfortable with the wording... of 'practical visionary' as an 'identity', but it happens 'on the ground'

Daniel -We've got to see it through and we've got to model it and culturally we have to see it through – and help people understand we don't need to get 10 out 10 the whole time – ... the whole 'practical visionary' thing [brand identity] allows us to make mistakes – somebody human make a mistake – an individual, a team or just life...The middle ground of 'practical visionary' is very interesting for us

4. Analysis and Interpretation

Each of the four sub-themes is now analysed in terms of what potential contribution each sub-theme can give to how brands and branding are being understood and used by these ten decision –makers in terms of engaging internal and external stakeholders.

4.1. Analysis and Interpretation: 'A Complex Balancing Act'

This theme highlights the cognitive complexity of constructing the Oxfam brand and branding as a result of the sheer amount of factors and actors that have a stake in the NGO. This complexity is compounded by the geographical, chronological and societal distance between stakeholders and the difficulty of striking the right balance between emotional engagement and rational accuracy. The findings demonstrate how this cognitive complexity is experienced by the decision makers in Oxfam as they try to make sense of how other stakeholders are making sense (or not making sense) of Oxfam.

Loewenstein and Small's (2007) seminal paper proposed a theoretical model for how decision making happens around aid and development and outlined the potential cognitive and motivational dilemma in terms of whether, whom and how to 'aid' others. They highlight the danger of trusting the decision-making to the fast-acting but potentially 'incorrect' cognitive influences of 'sympathy' while highlighting the cognitive limitations of decision-makers to weigh up all the multiple and complex factors using our more rational 'deliberation'. Loewenstein and Small (2007) argue the need to integrate these two qualitatively different processes and ideally they would want decision-makers to integrate more 'deliberation' or reason into their decisions and encourage other stakeholders to do like-wise. Other cognitive theorists (Burke 1954; Haidt 2006; Lakoff, 2004, 2008) have argued that we can 'frame'

decisions to help people make connections in new ways because humanity has the capacity to learn and be educated, providing it is supplied with what Damasio (1994, 1999) calls ‘emotionally competent stimulus’.

It has been demonstrated as shown in empirical research into donor motivation that many people make their decisions about aid using ‘heuristics’, whether that be a familiar country, a sympathetic story or emotional relation to the victims (for example Huber, Van Boven, McGraw & Johnson- Graham, 2011; Zagefka, Noor & Brown, 2013; Zagefka et al., 2010). In other sectors, Punj and Hillyer (2004) have demonstrated in line with heuristic – systematic processing frameworks (for example Chaiken 1987) that ‘brand heuristic’ can mediate between global brand attitudes and brand preferences and decisions.

Daniel Kahneman (2011) has defined a heuristic as ‘a simple cognitive procedure that helps find adequate (but often imperfect) answers to difficult questions’, (2011, p.98). As Collier (2007) has rightly demonstrated, aid and development decisions are always complex and rarely simple. Furnham (2014) has explained that in market contexts, a brand can act as a heuristic to help consumers differentiate between competitive offerings. The framing challenge for NGO branding is whether and how it could act as ‘positive’ heuristic, leading to qualitatively ‘better’ decisions around aid and development. In acting as a positive ‘heuristic’, NGO branding can either be used instrumentally to secure immediate funds from donors or it can be used strategically (Kylander & Stone, 2012; Hatch & Schultz, 2009) to help sense –making, motivation and engagement for all internal and external stakeholders, over time, geography and societies.

4.2. Analysis and Interpretation – ‘Divided Selves’

This theme highlights the debates and dilemmas about the relative priority of various stakeholders within the definition and application of the Oxfam ‘brand’. The level of emotional conflict and ‘soul-searching’ evident in people’s testimonies appears to expose a more fundamental dilemma at play in terms of how the act of ‘branding’ itself influences NGO identity and the power relations between an NGO and its

recipients and partners. There is the possibility that the needs of end-recipients may be at best diluted and at worst excluded from how 'brand' is conceptualized and applied. These power dynamics and dominance issues between NGO self-interest and NGO social mission have been discussed in the broader literature on aid and development and 'the aid chain' (Chambers, 1997; MacLachlan, Carr & McAuliffe, 2010; Edwards & Sen, 2000; Slim 2002).

Within the Hatch and Schultz (2009) model of branding (which seeks to align brand to vision, culture and identity), these findings raise an important issue around defining and maintaining an appropriate and healthy 'centre of gravity' for an NGO brand, between the motivations of internal and external stakeholders. Jones, Felps and Bigley (2007) have argued that ethical dimensions of stakeholder-related decisions need to be guided by the moral dimension of the 'stakeholder culture' as mapped on a spectrum from 'self-focused' to 'other-focused' sectors— so for example a financial institution may operate under a guiding principle of 'corporate egoism' but for an NGO or charity, the guiding principle would need to be 'moralist' or 'altruist'. The implication for a given NGO would be that the 'centre of gravity' for stakeholder-related decisions, would need to be the welfare of recipients, for this is the stakeholder, on which the 'authority' of all other internal and external stakeholders depend (Slim, 2002).

There is another important discussion that the 'Divided Selves' theme raises – there have been recent reports (Crompton, 2010; Darnton & Kirk 2011, written by NGOs like Oxfam in conjunction with funding bodies (for example DIFID), discussing the importance of cognitive framing (Lakoff, 2008) around aid and development and in particular asking whether it is possible for the sector to move from engaging with people in a 'transactional' manner to engaging with people in a 'transformational' manner. It has been argued (Compton 2010) that in order to get multiple stakeholders to engage with and ultimately tackle 'Bigger than Self' problems, NGOs need to communicate and behave from a perspective of 'common cause'. The challenge for NGO branding is whether it can be part of framing a shared transformational movement involving all stakeholders, around 'making a difference', at the same time as acknowledging the unique contribution of the specific organization.

4.3 Analysis and Interpretation – Cultural Legitimacy of Brands

This theme explores whether brands and branding are seen as culturally legitimate within Oxfam's organizational culture and how different participants describe their own and others 'theory of brand' to explain how they feel branding fits or doesn't fit the broader Oxfam culture. The rejection of brands and branding on the grounds of cultural 'fit' has been referenced in much of the academic (Hankinson, 2001; Stride & Lee, 2006; Kylander & Stone, 2012) and professional (Burnett, 2009; Dufour, 2012; Saxton, 2002) literature on branding within charities and non-profits. Indeed, proposed theories around branding charities or non-profits, have sought to overcome these fundamental objections, in proposing how brands could be conceptualized (for example as a 'values –concept' – Stride & Lee, 2006) and how brands can be applied (for example using the IDEA (Integrity-Democracy-Ethics-Affinity) framework – Kylander & Stone 2012). However, this research highlights the fundamental identity 'split' between embarking on a 'branding' to manage organizational identity and simultaneously rejecting the identity implications of being the type of organization which 'brands' and is 'branded'. This 'splitting' can also affect the perceived respect for the 'expertise' of the professionals working with the 'brand'.

At one level, the lack of cultural legitimacy around branding appears to be about a cultural clash between the culture of commerce and the culture of charity, NGOs or non-profits. Culture operates on multiple levels from the highly visible, described as artifacts and rituals of the organization to the deeper professed values and the even deeper tacit assumptions (Schein, 1960, 1984). The issue around brands and branding for NGOs could be argued to be that despite the adoption of practices and resourcing around branding, there could still be cultural resistance to or rejection of the sub-culture of branding. It also could explain why tactical use of branding to secure funds from donors might be 'accepted' as a 'necessary evil' but a more strategic use of branding to 'guide' internal employees and volunteers could still be rejected as simplistic, intrusive, wasteful and counter-cultural.

This tension is likely to involve more than the topic of branding and it is arguably part of a bigger conflict around non-profit identity, explored by Kreuger and Jäger (2013) as a cultural clash between 'Volunteerism' versus 'Managerialism'. Werker and

Ahmed (2007) have argued that it is only in the area of donor funding where 'market mechanisms' can be seen at play in the world of NGO's but this does not deny the fact that aside from 'market' mechanisms, there can be other social 'exchange' at play in other dimensions of NGOs relationships with partners, employees and recipients. Another possible reason why the language and practices of branding are so viscerally debated within Oxfam is that brands are by their very nature 'public' and communications and interactions with the outside world necessarily 'say something' about the whole organization, the people that work there and how they view the world. In that public space, the NGO is potentially forced to face all its stakeholders at the same time and attempt to make sense of what it is doing with each of them, in terms that could appease or 'make sense' to them all.

Cultural psychologists, Berry and Sam (2006) have proposed that there are four 'strategies of acculturation', which can be adopted by a sub-culture in relation to a main culture – marginalization, separation, assimilation and integration. It seems as if brands and branding are moving away from a marginalization strategy in larger NGOs such as Oxfam but it remains to be seen whether as a sub-culture, branding is to be separated, assimilated or fully integrated into the main NGO cultures. Any of these processes will require continual negotiation in order to incorporate and reflect the relevant dimensions of 'theory-of-brand' as they combine to shape the future identities of non-profits and NGOs. Importantly this is not just about the non-profit sector importing (in what Anheier, 2000, has dubbed 'copy cat' fashion) the understandings and behavior of for-profit brands, lock stock and barrel. Even as the non-profit sector 'professionalises' (McLeod Grant & Crutchfield, 2007), and the for-profit sector 'shares value' and appreciates a wider systems approach (Porter & Kramner 2010), it must be remembered that there are still differences in the 'bottom line' for the two sectors (Anheier 2000; Kaplan, 2001; Lohmann, 1989; Sandel, 2012), and that the assumptions and practices around 'brand' must reflect that.

4.4 Analysis and Interpretation – Underlying Legitimacy of NGO's

This theme concerns the critiques that are being levied at NGOs in terms of the inefficiency, ineffectiveness or even mal-effectiveness of humanitarian and

development interventions (Moyo 2009; Polman, 2008; Collier, 2007; Easterly 2006,). Even though the specific arguments have been counter-argued by economists like Sachs (2005) and Sen (1999) and the philanthropist Bill Gates, (2011,2014,) the net effect is likely to be undermining the very legitimacy of the NGO sector, from both a 'functional' and a 'symbolic' perspective.

Researchers have consistently underlined the need for greater NGO accountability. Ebrahim (2003) has found empirical evidence that NGOs put priority on upward short-term donor accountability and under develop downward internal and long-term accountability mechanisms. MacLachlan, Carr and McAuliffe (2010) have identified the issue of 'donor-bias' in decision-making and decision makers within the broader aid context. Florini (2003) has argued that the legitimacy concerns around NGOs can be traced to the difficulty in defining the collective good for society. Brinkerhoff, Smith and Teegan (2003) and Edwards (1998) have all argued that the difficulty in defining effectiveness exacerbates the challenges of being accountable. Many commentators ((Edwards 1994; Forsyth & MacLachlan, 2009; Fowler, 1997; Slim 2002) have argued that a critical element of NGO effectiveness will lie in their ability to evaluate performance, acknowledge failure and actively learn from failure. The Accra 2008 Agenda for Action clearly has stated:

'We will be judged by the impacts that our collective efforts have on the lives of poor people. We recognize that greater transparency and accountability for the use of development resources – domestic as well as external- are powerful drivers of progress,' (2008, p.22).

Experimental research has shown that the non -profit organization 'stereotype' is anchored more in 'trust' whereas the for-profit organization 'stereotype' is anchored more in 'expertise' (Aaker, Vohs & Moligner, 2010). The very legitimacy of NGOs is anchored in 'being good' and 'doing good' (Edwards, Hulme & Wallace, 1999; Martens, 2002; Slim 2002; Werker & Ahmed, 2007) but if this idealized identity is not seen to be congruent with behavior and outcomes, it can undermine and erode collective and personal work identity (Burke & Stets, 1999). For both internal and external stakeholders, this has the potential to create an 'existential dilemma', if the NGO is constructed as a 'project' (Sartre 1956/1943), it raises questions around: What is it 'being'? What is its current role in the world? and importantly: Where are the

seeds of its 'becoming'?

This existential dilemma could have different implications for NGO branding, depending on (i) how NGOs choose to see branding (ii) how NGOs choose to tackle the attacks on the sector's legitimacy (iii) whether NGOs see branding and sector legitimacy as connected. At one extreme if an NGO sees branding as superficial and unconnected to the real impact of an NGO in the world, there is no reason to seek to use the brand or branding to help tackle these critiques. (In fact the very existence of an NGO 'brand' could be used by critics as more evidence that the NGO is merely treating 'aid as a business' and making donors and the North feel good about themselves, irrespective of actual results on the ground).

On the other hand, if an NGO sees branding as a deeper relational construct, which symbolically and functionally connects all stakeholders around 'making a difference', then part of the role of the brand is to demonstrate 'the difference being made' using evidence and measurement, being transparent about success and failure and continually learning what works and what doesn't. This 'work in progress' approach to branding, which the IT sector have dubbed being 'Always in Beta' allows an organization to behave as a 'movement brand' in which intention is continually updated by programme learning and feedback from stakeholders. Within the broader debate about the role of NGOs within development, this work-in-progress aspect of branding fits with an Organisational Learning approach (Edwards 1994; MacLachlan, Carr & McAuliffe, 2010) and allows NGOs to work within either the 'development-as-delivery' and/or the 'development-as-leverage' paradigm (Edwards, Hulme & Wallace, 1999) and be appropriately accountable to stakeholders, in both behavior and relationships (Obrecht, 2011; Slim, 2002).

4.5 Critique of Analysis and Interpretation

As with all interview-based methodologies, IPA can be subjected to what has been defined as the 'radical critique of interviews' (Murphy et al. 1998, p.120-3). The radical critique raises questions about the ability of interview data to give any access to the minds of the interviewees or the social world that the interviewees inhabit.

Those who critique interviews as a scientific methodology question whether an interview can give access to any phenomenon beyond the social phenomenon of interviews or indeed the specific phenomenon of a specific interview. Hammersley and Gomm (2008) identified four distinct components within the radical critique. The first element of the critique questions the relationship of public accounts to private thoughts and behaviour and instead views interview data as part of 'public display' or subjective discourse (Dingwall, 1997, Edwards, 1997). The second aspect of the critique is an epistemological extension of the first and questions whether personal accounts can ever represent an internal or external reality and instead whether they should be treated as different interpretations of social or cultural discourse. The third component of the critique is methodological and concerns the possible inaccuracy and lack of observable reliability of interviewees' subjective accounts. Hammersley and Gomm (2008) highlight that the honesty and accuracy of the research is contingent upon the rigour of the participant in terms of the accuracy of reports. Finally, the fourth element of the critique concerns the interview context, where the formal and public nature of the interview means that the accounts of the participants can only represent the artificial reality of an interview and not their experiences in the real world.

This IPA research into the role of brands and branding with ten Oxfam decision-makers could be critiqued on every level of the 'radical critique' (Murphy et al., 1998). In the case of the 'public display' critique or the 'social and cultural' discourse critique, it can be counter-argued that brands are partially experienced and communicated using discourse and that these aspects of brands and branding are relevant to the phenomenological goal of 'getting back to the thing itself' (Husserl, 1927). Nonetheless there is genuine risk that this interview discourse is purely about the discourse of brands and branding and less about the actual experiences of these internal decision-makers and their wider stakeholders. In addition, it is accepted that the methodological limitation of reliance on interview data may provide biased findings and ideally this method would be 'triangulated' with more objective observations. In terms of the fourth component of the radical critique, there is undoubtedly a risk that the artificial environment of an interview might influence or distort the findings. In addition, the disclosure of the researcher's professional identity as an expert in brands and branding may have over-encouraged expert jargon as a

form of 'pseudo -communication' (Furnham & Gunter, 1983) or corporate chest-beating (Hoggett, 2006). As a counter-argument to this last component of the critique, it is also possible that this honest disclosure from the researcher about her professional identity helped to build interview rapport with the participants and led to more insightful, revealing interviews.

A final possible critique of this analysis and interpretation concerns the role of reflexivity. As outlined earlier, this approach followed the IPA guidelines (Smith, Flowers and Larkin, 2009) to reflexivity and built reflexivity into the on-going interpretation, analysis and sense making of and with the data. Willig, (2008) This 'integrative reflexivity' has been argued to be central to phenomenological research (Tomkins & Eatough, 2010) and can prevent the researcher from being distracted by their own identity or with the aspects of the research process. However, this integrative approach to reflexivity can be critiqued on the grounds that it might be important for the researcher to explicitly acknowledge aspects of their own identity as part of the analysis and interpretation process. In addition, there may be process aspects of the research (for example participant order, relationships and reporting structures between participants, career history) that could also influence the interview data. In the case of this research with Oxfam, there are ethical concerns in disclosing these personal details within the analysis but it would undoubtedly be richer research if these aspects could be explicitly integrated into the analysis and interpretation.

5. Discussion and conclusion

The Paris Declaration (2005) has set down the importance of aligning donor aid and NGO intermediaries to the needs and wants of recipients. The four themes emerging from this research all speak to the challenges of alignment for branding within NGOs, within each stakeholder's motivations, between different stakeholder groups and the wider system, if branding is to contribute to the goals and objectives of development NGOs. There are challenges at multiple levels if a given NGO brand is to optimise coherence: within individual stakeholders' cognitions, the shared meaning between stakeholders, the organizational culture and the wider societal discourse and validation of the NGO sector. The difficulties identified in constructing brands and

branding go to the heart of how NGOs make sense of their overall identity and how this is manifested in structures and behaviour. The issue of branding brings out the complexity and clashes within NGO identity, it does not itself create them.

The first theme 'a complex balancing act' highlights the sheer amount of factors and actors within an NGO brand and points to the potential need for brand to operate as a 'organising principle' or 'heuristic' (Punj & Hillyer, 2004) that integrates 'head and heart' in order to engage and motivate all NGO stakeholders. The second theme – 'divided selves' – highlights how if branding is used purely to engage one stakeholder group, there is a danger that it symbolically divides stakeholders from one another, reinforcing what Carr, MacLachlan and McAuliffe (1995) call 'donor bias', rather than promoting the Paris Declaration (2005) principle of aligning Aid to recipients' needs and objectives. The third theme speaks to the residual issue around the cultural legitimacy of brands and branding in NGOs – if the brand 'concept' (as expressed in language and practice) is not accepted and 'valued' from 'within', it will continually be seen as a 'necessary evil' and at best achieve 'assimilation' within the overall NGO culture, rather than true and valuable 'integration'. Finally the fourth theme looks at the credibility challenges to the overall sector and points towards an important decision for the sector regarding the use of branding – if it is merely 'surface branding', it at best buys the sector some short-term protection from its detractors and at worst it compounds denial of reality, but if alternatively, it is to be 'deep branding', it needs to be transparently linked to the efficacy of NGO actions and interactions – both 'hard' and 'soft' evidence – in order to build trust and confidence in of what has been achieved and how the NGO behaves.

Towards an Integrated Model of NGO Branding

These findings expose shortcoming within the dynamic systems models of branding proposed by Hatch and Schultz (2009), in which 'brand' is created by the strategic alignment of vision, culture and identity. The geographical, chronological and societal separation of donors and recipients within NGOs means that there is a danger that the expectations and the experiences of these important stakeholders can be easily misaligned. Even within the symbolic interactionist paradigm (for example Mead,

1934; Burke & Stets; 1999, Turner, 2011), this misalignment of stakeholder perspectives can mean that identity is de-centred or loses its equilibrium (Stets & Burke, 2000).

There is an opportunity for an integrated branding framework within NGOs to keep identity centred around 'brand- as- purpose'. Purpose has been empirically shown to be crucial for individual work motivation (Ariely, Kamenica & Prelec, 2009) and McKnight and Kashdan (2009) have argued that purpose can be the key to integrating health, wellbeing and self-concept on an individual level, defining it as:

'Purpose is a central, self-organizing life aim that organizes and stimulates goals, manages behaviors, and provides a sense of meaning. Purpose directs life goals and daily decisions by guiding the use of finite personal resources. Instead of governing behavior, purpose offers direction just as a compass offers direction to a navigator; following that compass (i.e., purpose) is optional. Living in accord with one's purpose, however, offers that person a self- sustaining source of meaning through goal pursuit and goal attainment. Furthermore, purpose is woven into a person's identity and behavior as a central, predominant theme—central to personality as well.' (2009, p. 242).

Beyond the individual, shared 'purpose' can be an important basis to unite, an organization, stakeholders with diverse interests and the broader system. Similar 'organising principles' like 'shared value' and 'common cause' have been recently proposed in the both commercial (Porter & Kramer, 2011) and social change (Crompton, 2010; Darnton & Kirk, 2011) sectors. 'Purpose' could also be argued to overlap with much of the strategy and management language about 'mission', 'vision' 'proposition and 'objectives. However, it can be argued that shared purpose works on an more integrated level as a construct, in terms of weaving together goals, behavior and identity while allowing a dynamic relationship for feedback between the entity itself and its stakeholders.

'Brand-as-purpose' also integrates previous theoretical frameworks around charity or non-profit branding, whether NGO brands are viewed through the perspective of 'brand-orientation' (Hankinson 2001), 'brand-as-values' (Stride & Lee, 2006) or 'brand-as-behaviour,' which in turn is grounded in 'theory of change' (Kylander & Stone 2012). Empirical research into the motivations of donors (Sargeant, Ford &

West, 2005), funders (MacMillan, Money, Money & Downing 2005), and employees (Werker & Ahmed, 2007) has shown that 'cause' is the primary determinant of 'giving' and empirical research into brand 'personality' in the charity sector (Sargeant, Ford & Hudson, 2008) has shown that donors see 'personality' as inextricably linked with aspects of 'cause': 'benevolence', 'social progression' or 'conservation'.

Importantly defining 'brand- as-purpose', rather than 'brand as promise' or 'brand-as vision', keeps the NGO anchored in 'reality' and 'the present', while integrating 'the past' (experiences) and 'the future' (expectations) within the meaning of the construct. As Kenneth Burke (1954) has explained it, this cyclical process is how we humans make meaning: 'Work both expresses our interests and informs them', (1954, p.234). Maintaining a focus on the present including current behaviour, prevents the culture from 'splitting' itself from reality and aligning itself with an impossible ideal, which Vega Zagier -Roberts (1994) has described as a self-defeating group assumption around the 'self-defined impossible task'. Instead on-going purpose can promote healthy *eustress* rather than destructive *distress* within the organization (Seyle, 1974) and beyond, allowing people to occupy what social activist Parker Palmer (2011) calls the 'tragic gap', between 'corrosive cynicism' and 'irrelevant idealism'.

Theoretical Implications of this Research

This research can also contribute to the theoretical question: do NGO brands *differ in kind* or *differ in degree* from brands in other sectors? At a surface level, it could be argued that the difference between NGO brands and other brands is just a difference of degree – for example there is no reason why an integrated model of branding based around 'brand-as-purpose' could not technically apply to an oil company or a fast-food conglomerate? Nevertheless as demonstrated by the themes in this analysis, there are practical, emotional, cultural and process complexities in NGO brands and branding which can make the management and definition of brands and branding significantly more challenging than for-profit brands. Additionally, at a deeper level it can be argued that the underlying value system for NGOs, non-profits and charities is not financial capital or even social capital, but moral capital - defined by political

scientist Kane (2001) as:

‘Moral capital is moral prestige – whether of an individual, an organisation or a cause – in useful service. Like financial wealth, moral ‘wealth’ only becomes moral ‘capital’, when mobilised for the sake of external tangible returns. Like other capital, moral capital is put at hazard in its mobilisation- requiring considerable skill and luck in its maintenance and deployment’, (2001, p.7).

Understanding NGOs as grounded in moral capital means the assumptions and practice of branding will be fundamentally different from branding sectors, which are grounded in financial or social capital. Brands and branding will need to earn their moral-stripes in this sector, not by claiming trustworthiness but by demonstrating it, in every stakeholder action and interaction. An understanding of NGOs as grounded in moral capital helps explain why cultural resistance to ‘branding’ as ‘immoral’ (Sargeant, 1999), is so problematic for the sector. This is not merely a response to ‘Not Invented Here’ – this is a reflection of ‘Got No Place Around Here’ – where to paraphrase Meg Wheatley (2012), using ‘branding’ to solve the identity or purpose issues of NGOs can be seen as the cultural equivalent of ‘sending the foxes in, to fix the chicken coop’.

It is tempting to recommend that the word brand itself is too ‘toxic’ for this sector and should be renamed as something more ‘moral’ like Common Purpose, Working Identity or ‘Provisional Selves’. Perhaps there will be an argument to re-name branding in order to acculturate ‘branding’ within the NGO sector, but ultimately ‘branding’ will only be fully ‘integrated’ into NGO cultures when it can demonstrate how it serves and appreciates moral capital rather than dilutes or destroys it.

Limitations of Research

A key limitation of this research is that partners and recipients and donors were not interviewed directly, so these stakeholders are only represented indirectly through the views of the study participants. This raises a legitimate concern that the research sample is itself replicating the ‘dominance’ issues within the sector (MacLachlan, Carr, & McAuliffe, 2011). It will be important to incorporate these other stakeholders

in future research on branding within the NGO sector.

It was originally anticipated that the analysis and discussion arising from this research would be shared and discussed with Oxfam leadership as part of enriching the process of understanding, coming from this research. An interim summary of the research was sent to the chief executive office of Oxfam in March 2013 but unfortunately both the Marketing Director and Chief Executive Officer had departed from Oxfam at that stage. Following Smith, Flowers and Larkin (2009), the IPA methodology does not mandate that research analysis and interpretation is shared with participants nor was there any ethical or methodological commitment from the researcher to engage in individual interpretative dialogue with the research participants. Nevertheless, the research themes and analysis might have been richer if the research had been presented to Oxfam and the additional discussion and dialogue could then have been incorporated into the final analysis.

Future Research

Future research needs to explore the role of purpose further with respect to NGOs and all of their stakeholders and investigate any differences between large and small NGOs in terms of conceptualization and application of branding. Theoretically it is important to further understand how NGO brands differ from other brands 'in kind' or 'in degree' and in particular if there are commonalities between NGO brands and other 'bigger than self' brands (e.g political parties, religions, nations, federations). Methodologically, following Gomm and Hammersley (2008), it will be important to look at studies that 'triangulate' the subjective experiences and perceptions of stakeholders with general and specific attitudes and behaviours. It will also be important to explore the motivations of specific donors (e.g the donor public) and understand the factors that underlie trust and 'moral capital' and galvanise altruism and giving in a specific and general context.

Policy and Practical Implications of Research

Regarding policy and practice, the important implication from this research supports

Laidler-Kylander and Stenzel's (2013) recommendation to incorporate 'brand' into 'theory of change' (Vogel/ DIFID, 2012) for each NGO. Critically it is important to make explicit 'theory of brand,' including assumptions about the relevance of and relationship to branding for all stakeholders and the potential role it plays for the NGO and the sector in achieving the Sustainable Development Goals (Hand, Carr & MacLachlan, 2016). If the rationale for branding remains swathed in 'smoke and mirrors' it will continue to remain controversial within NGOs and there will continue to be resistance from internal stakeholders, which effectively undermines the branding 'project'. Much as there is the potential for 'brand – as –purpose' to be a coherent construct that unites stakeholders, this is ultimately a decision for each NGO and cannot be 'imposed' by internal or external brand zealots.

At a systemic level, there is undoubtedly a 'cognitive framing ' (Crompton, 2010; Lakoff, 2004) cost to 'theories of brand', which focus only on NGO 'self-interest', so there is a possible need for guidelines and support for more strategic, collaborative, transparent theories and practices of branding in aid and development. Initiatives like the DEC and Alliance 2015 need to be seen as 'action-research' or Organisational Learning (Forsyth & MacLachlan, 2009) for the sector, which can produce 'working practice' learning for collaborative branding. The findings, interpretations and discussions arising from this research can be a useful contribution to Oxfam and DIFID, as they attempt to tackle the difficulty of 'finding frames' (Darnton & Kirk, 2011) and occupying those frames, to build value and values (as outlined in Chapter 2, this volume) in terms of relationships, actions, communication and shared learning.

Conclusion

In conclusion, the findings, interpretations and analysis demonstrate that there is potential for 'brand' to lead to division, confusion and lack of coherence at all levels but also potential to for 'brand lead to 'multi-level coherence' for the NGO and its cause. If NGOs choose to use branding in a 'deep' versus 'surface' way, engaging with what Waltzer (1994) would call our 'thick selves' versus our 'thin selves', adopting a relational construct in dialogue with the experiences and expectations of all stakeholders and constantly learning and adapting from the 'feedback' of hard

evidence and softer relationships, then branding has the potential to build what Haidt has called 'cross-level coherence' (2006). Slim (2002) has argued that the 'authority' of NGOs needs to be anchored in the combination of 'doing' (what NGOs achieve) and 'being' (how NGOs relate to others). A conceptualization and application of 'brand-as purpose' could provide a 'working identity' (Ibarra, 1999) which can act as a shared crucible for the actions and interactions of transformation, marrying Aristotle's insight that 'We *are* what we increasingly *do*' with Ghandi's exhortation to '*Be* the change we want to *see* in the world'.

5. Acknowledgement

It has been a privilege for me to have access to the Oxfam culture and the ten decision-makers who were so candid and open in sharing their own perceptions, hopes, ambitions, fears and doubts about the Oxfam brand and how it connects to the Oxfam culture internally and the broader stakeholder culture externally. In bearing witness to the testimony of these ten people, I hope that I have managed to strike a balance between doing justice to their interpretations and doing justice to my own, especially as they relate to the research question – the role of brands and branding in NGOs. It is my intention that this research would manage to be both insightful and useful to Oxfam and to the broader world of NGOs and non-profits – both in terms of how it might inform theory and practice for the sector.

I was fortunate to gain access to Oxfam as a result of the intervention of Professor Mike Clarke to the Oxfam CEO – Barbara Stocking. Thomas – Schutz –Jagow and Sophie Rutland enabled and empowered my research when they identified my 'rich' research sample, got me access to their busy work-lives and coordinated their schedules on my behalf. My own legitimacy as a researcher was anchored in all of theirs' and I hope my final work deserves the faith and support that they have all shown to me.

Chapter 4. Brand Aid? An investigation of the effects of message framing, charity semantic differentials and individual psychological differences on likelihood to donate to a hypothetical overseas charity

Abstract

Different aspects of branding an overseas aid charity appeal were examined in terms of intended support and actual donation with a general population ($N = 238$). An experiment investigated the influences of message framing on intended and actual support of a hypothetical charity, in terms of whether the issue of child hunger was presented as short-term (crisis) or long term (development) and whether the appeal was more affective or deliberative in cognitive processing terms. The relationship of semantic differentials based on 'ideal charity' to intended support and donation was also explored as well as the relationship between individual difference variables (happiness, religion, self-control, hope for a just world and self-efficacy for a just world) and intended and actual support. The accuracy of the general public to estimate levels of government expenditure on overseas aid was also investigated. There was no evidence of message framing effects in this experiment. There was a positive relationship between Self Efficacy for a Just World (SEJW) and intended support of the overseas charity but no relationships with actual donation. There was no evidence of significant correlations between Self Control, Religion, Happiness or Hope for a Just World (HJW) with intended or actual donation to the charity. It is possible that the labeling of the charity as hypothetical combined with the deliberate use of a neutral image of the child 'flattened out' participants' affective response and rendered the four versions of stimulus equivalent. The public estimates of government expenditure on aid were largely inaccurate with a median estimate (3%) over three times the government target level (0.7%). The implications of these findings for theory, future research and practice are discussed.

1. Introduction

Official funding to development is estimated at 126 billion (United Nations, 2013) but this has been reducing in light of recent recession. The World Bank (2007) estimates that 15% of Aid is channeled through NGO's, who depend on individual giving from the general public for financial and non-financial support as well as official funding from nation states, multi-lateral organisations and private foundations (Werker & Ahmed, 2008). Individual giving represents a large proportion of total giving to charity. In the U.S in 2012, Giving USA found that individual giving was \$229 billion and represented 72% of total private charity contributions. In terms of specific overseas appeals, there can be large variations in individual donations to different issues and disasters (for example see the United Nations Office for the Coordination of Humanitarian Affairs, 2007). Individual donation levels were high for the Asian Tsunami in 2004 but much lower for the large –scale humanitarian crisis in Darfur (Baker, 2005). K. Epstein (2006) has demonstrated that there is a mismatch between donations and need (as measured by ‘lives at risk’ - See Figure 5 below:

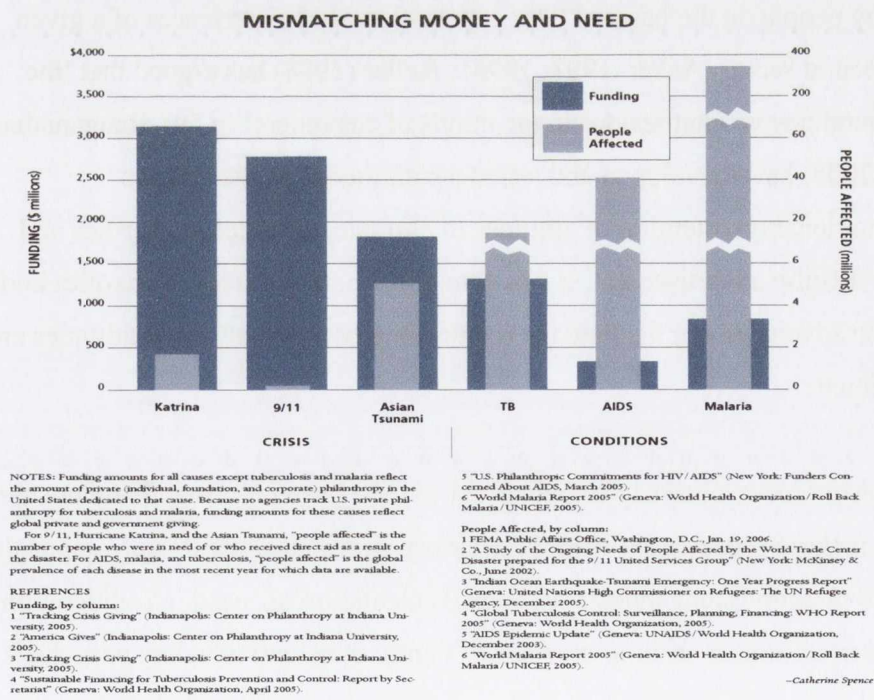


Figure 5- Mismatched donations and needs associated with different crises and conditions (Epstein, K., 2006)

In Chapter 3, Interpretative Phenomenological Analytical qualitative research was conducted with ten brand decision –makers within the Oxfam organization, which demonstrated the challenges for NGO brand decision-makers in deciding how the Oxfam brand could ‘frame’ aid /development to the public in order to balance short-term and long term needs for funding. In particular, in sub-theme 1 – ‘a complex balancing act’ - brand decision makers described the funding conflicts around ‘framing’ appeals as short-term crises versus longer term development and the ethical conflicts around seeking to activate emotional of ‘affect’ systems of decision-making or seeking to activate rational or ‘deliberative’ systems of decision-making. In addition, in sub-theme 4 – ‘underlying system legitimacy’ - the brand decision-makers discussed the critiques of the whole Aid system as ineffective or mal-effective (Collier, 2007; Easterly, 2006; Moyo, 2009) and the corresponding challenges and costs of accountability and measurement for how NGO’s present themselves to a broad range of stakeholders, including the public.

Brands have also been recognized as means of differentiating charities and a factor influencing charity choice (Kylander & Stone, 2012; Stride & Lee, 2007). Brands are constructed by people on the basis of their expectations and experiences of a given product, service or sector (Aaker, 1991; 1996). Keller (1998) has argued that ‘the power of a brand lies in what resides in the minds of customers’ (p.59). Ranganathan and Henley (2008) have developed and tested a path model on the relative contribution to donation intention of attitudes to altruism, attitudes to charities and attitudes to a specific advertisement. It was found that both attitudes to charities and attitudes to the advertisement mediate the relationship between altruistic attitudes and intention to donate.

Behavioural economists Loewenstein and Small (2007) have proposed that there are two decision-making processes at work in deciding on which cause to help – appeals to emotion (‘Sympathy’) and appeals to rational calculation of ‘need’ (‘Deliberation’). This dual-process decision-making model (see Figure 6, below) is in line with dual-process models of cognition (Chaiken & Trope, 1999; Epstein, S., 1994; Kahneman & Frederick, 2002). Experimental studies (for example Hsee & Rottenstreich, 2004) have found that real-world value curves vary according to whether people use the psychological process of valuation by feeling or valuation by calculation to determine

preferences. Experimentally, Small, Loewenstein, and Slovic (2007) have demonstrated that Sympathy Appeals elicited higher level of donation than Deliberative Appeals to equivalent disasters. In addition, Huber, Van Boven, McGraw and Johnson-Graham (2011) found ‘immediacy effects’ when participants donated more to the last of four emotional appeals and argued that scope-neglect undermined deliberative decision-making and led to people donating to relatively less deadly crises.

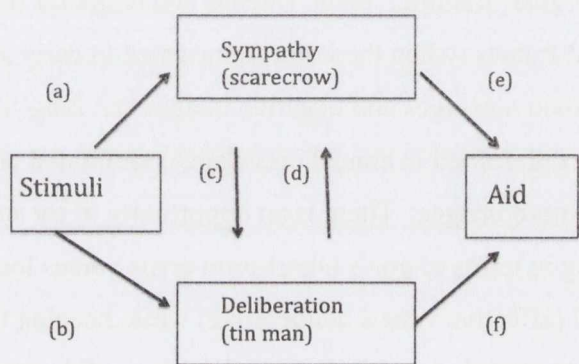


Figure 6- Theoretical perspective on sympathy, deliberation and aid (Loewenstein & Small, 2007)

This study proposes to further investigate these social cognitive trade-offs for public support specifically in terms of the goal focus of the charity/NGO between short-term (crisis) and long-term (development) and in terms of the type of appeal between ‘sympathy’ and ‘deliberation’ processes. In addition, the study explores the contribution of different aspects within the ideal charity (including the focus of the charity, the ethos, the funding and personal relevance) to intended support for the charity and the contribution of individual psychological differences. Finally the study examines the accuracy of the general public on current government expenditure on overseas aid.

Conceptual Background and Hypotheses

Message Framing Effects

Framing effects have been investigated in charity appeals for donation. Studies (Kogut & Ritov, 2005a; Small & Lowenstein, 2003) have found evidence for framing the issue around an 'identifiable victim' rather than an amorphous group and Zagefka et al. (2010) found that there was significantly higher levels of donation when a disaster was framed as caused by nature versus humans. Chang and Lee (2007) explored the influence of goal- framing, image valence and temporal framing and found that short-temporal frames (when the issue is presented in daily prevalence) facilitated negatively framed messages and negative images and long-term temporal frames (when the issues is presented in annual prevalence) facilitated positively framed messages and positive images. There is an opportunity to try and isolate the effect of message framing in terms of goals (short-term crisis versus longer-term development) and appeal (affective versus deliberative) while keeping the imagery neutral and constant and to contribute to the broader literature of decision-making in aid and development. The following hypothesis is proposed:

H1: That framing message appeals (as short-term crisis versus long-term aid and as 'need' versus 'impact') will affect people's levels of claimed short-term and long-term support for the mythical charity, People Aid and claimed /actual donation versus giving to self/other charities.

Ideal Charity on Key Dimensions

People's expectations of charity can influence their support of specific charities, as has been demonstrated in different structural equation modeled studies exploring the influences of charitable giving (Cheung & Chan, 2000; Oosterhof, Huevelman & Peters, 2009; Ranganathan & Henley, 2008). Specific charity aspects such as the outcome efficiency (Furnham, 1995), organizational effectiveness (Sargeant, Ford & West, 2005) and perceived management of the organization (Glaser, 1994) can all influence the likelihood and extent of individual giving. Semantic differentials (Osgood, Suci & Tannenbaum, 1957) are a quantitative technique, which helps

explore the consumer trade-offs of qualitative differentiators of a brand choice in a quantitative manner. Mindak (1967) has argued that is important that the statements and attitudes explored using semantic differentials are grounded in specific understanding and language of the sector concerned.

On the basis of the Interpretative Phenomenological Analysis conducted with ten decision makers in Oxfam (Chapter 2), it was decided to explore some of the key parameters that could engage NGO's with potential donors. Specific trade offs included the goal of the NGO (short term crisis versus long term development), the geographic focus of the NGO ('home' versus World Poor), the culture of the organization (passionate versus professional), the relevance of the NGO (social norm versus personal connection), the origin of the NGO (donor origin versus recipient origin), commitment of the NGO (emotional versus expertise), the resource levels of the NGO (long-term resources versus short-term scarcity) the spending ethos of the NGO (frugality versus investment in measurement) and the religious orientation of the NGO (religious versus secular).

These semantic differentials also reflected other experimental evidence around framing appeals using sympathy versus deliberation (Small, Loewenstein & Slovic, 2007) the importance of familiarity in increasing appeal donation (Zagefka, Noor & Brown, 2013), the difference in the stereotype of non-profit firms versus for-profit firms as a trade-off between perceived 'warmth' versus perceived 'efficiency' (Aaker, Vohs & Mogilner, 2010) and the importance of activity efficiency and outcome efficiency (Burt, 2012; Burt & Dunham, 2009) for humanitarian organisations. The following hypothesis is proposed:

H2: That 'ideal charity' semantic differentials on charity focus, ethos, funds and relevance will affect people's levels of claimed short-term and long-term support for the mythical charity, People Aid and claimed /actual donation versus giving to self/other charities.

Individual Psychological Differences

Psychological research has been done into various individual difference variables and donation or support of various charities. There have been investigations into the demographic and financial characteristics of donors (Wunderink, 2002,) along with variables such as age (Halfpenny, 1990; Nichols, 1992; Pharoah & Tanner, 1997), gender (Mesch, Rooney, Chin & Steinberg, 2003; Chang and Lee, 2007; Chrenka, Gutter & Jasper, 2009; Hall, 2004), social class (Jones & Posnett, 1991; Bryant, Jeon-Slaughter, Kang & Tax, 2003; McClelland & Brooks, 2004), social norms (Morgan, Dye & Hybels, 1979; Piliavin & Charng, 1990; Radley & Kennedy, 1995) and the degree of religious conviction (Halfpenny, 1990; Pharoah & Tanner, 1997; Jackson, 2001) have all been shown to impact on giving behavior.

In addition to extrinsic factors, the intrinsic determinants of giving are the underlying motives for electing to support a nonprofit (Sargeant, 1999). Factors shown to be significant indicators of giving include empathy (Fultz et al., 1986; Cialdini et al., 1997), sympathy (Clary & Snyder, 1991; Fultz et al., 1986; Schwartz, 1977) and emotions such as fear, guilt and pity (Amos, 1982; Dawson, 1988; Feldman & Feldman, 1985). It has also been argued, from the perspective of social justice motivation theory, that if people witness undue suffering, their belief in a Just World_ will be threatened, and they will be motivated to respond to restore their faith in justice (Lerner, 1975; Miller, 1977). Specific individual difference variables explored in this study include:

Self Control

Self control is a construct which has been linked to the deliberative override of affectively driven intentions (Baumeister & Vohs, 2003; de Ridder et al. 2012; Shiv & Fedorikhin, 1999) which can include providing aid when one is not emotionally motivated to do so, or not providing aid when one is so motivated. As an extension of their dual-processing theory around aid, Lowenstein and Small (2007) have argued that the impact of self-control on helping behaviour should depend on the balance of the relationship between sympathy and judgments about the efficacy of aid. The level of self-control has been varied experimentally in studies (Galliot et al., 2007) and

depleted cognitive reserves have been linked to decreases in both helping behavior and charity donation. Shitka et al. (2002) found in a high cognitive load condition, liberal participants decreased their sympathy for AIDS patients who had contacted the disease through sexual contact versus sympathy for AIDS patients who had contacted the disease through blood transfusion. Furthermore, studies have shown that public goods pro-social allocations (Martinsson, Myrseth & Wollbrant, 2010) and donations to the Red Cross, in a one-shot dictator game, (Martinsson, Myrseth & Wollbrant, 2012a) are positively associated with participants' scores on the Rosenbaum (1980b) measure of trait self-control. This study will investigate whether trait self-control influences the intended support and actual donation to the overseas charity. The following hypothesis is proposed:

H3: That trait self- control will affect people's level of claimed support for People Aid and claimed/actual donation versus giving to self/other charities.

Religion

Religion has an empirically complex link with altruism /charity (Monroe, 1996; Post et al., 2003) in practice although a simple positive one in theory (Pessi, 2011). A cross- cultural comparison (Reitsma, Scheepers & Grotenhuis, 2006) on the relationship between religion and charitable support found a robust relationship between strength of religiosity (as reflected in church attendance, dogmatic conviction and broad religious attitude) and broad intentional donations to poor countries. However there is also experimental evidence that the relationship between religiosity and charitable behaviour can be confined to in-groups (Norenzayan & Shariff, 2008; Saroglou, 2013). A structural equation model by Ranganathan and Henley (2008) found that religion was strongly correlated with a general attitude of helping others or altruism but this was mediated by both attitudes to charity and attitudes to a specific advertisement before leading to an intended charitable donation. This study will investigate whether trait religiosity influences the intended support and actual donation to the overseas charity. The following hypothesis is proposed:

H4: That self-reported religiosity will affect people's level of claimed support for People Aid and claimed/actual donation versus giving to self/other charities.

Happiness

Various studies have reported correlations between happiness or Subjective Well Being and altruism or generosity. Phelps (2001) found that people with altruistic personalities report the greatest level of happiness while Thoits and Hewitt (2001) showed that volunteer work causes greater happiness, life satisfaction and self-esteem. Positive psychologists (Boehm & Lyubomirsky, 2006; Fordyce, 1983) have also demonstrated that conducting 'random acts of kindness' can significantly increase happiness levels. Happiness and altruism can have a positive relationship but there can be crowding out due to 'mixed feelings' (Andreoni, 1989; Konow, 2009; Post, 2005). The causal relationship between happiness and generosity was investigated by Konow and Earley (2008) and it was found that short-term happiness did not predict generosity but longer-term happiness had a significant relationship with generosity. This study will explore whether subjective well-being evaluation influences the intended support and actual donation to the hypothetical overseas charity. The following hypothesis is proposed:

H5: That subjective well-being will affect people's level of claimed support for People Aid and claimed/actual donation versus giving to self/other charities.

Just World Beliefs

According to the Just World Hypothesis (Lerner & Miller, 1978), people have an inherent motivation to believe that the world is just, so they will make sense of past events or their own decisions by blaming victims or down-grading situations in order to justify the outcome. Carr and MacLachlan (1998) found that one who attributes poverty to individual causes is less favourable to provide aid to poor people, than one who attributes poverty to situational causes. Zagefka et al. (2010) found that naturally created disasters (for example earthquakes) elicited more donations than humanly created disasters (for example civil war) and found that these intentions were justified

by higher levels of 'victim blame'. In terms of individual Just World beliefs, Furnham (1995) has previously found that people with high Beliefs in a Just World (BJW) are positive about the idea of charity whereas people with high levels of Unjust World beliefs are more likely to be suspicious of interventions of charity versus the State. There were differences within the two Just World Scales investigated (Rubin & Peplau, 1975; Dalbert, Montada & Schmidt, 1987) as to which charities (for example local, overseas, political) were more deserving of support.

Moyhidenni and Montada (1998) have proposed that two separate constructs Hope for a Just World (HJW) and Self Efficacy to Promote Justice in the World (SEJW) can help explain different attributions and behavior in given societal situations. Both these constructs have a future dimension in terms of seeing a better vision for the world (HJW, 'I would like to see a world which is more generally just') and perceiving a personal capability to make a difference (SEJW, 'I can do things to help make the world more just') versus other Belief Just World (BJW) scales (for example Dalbert, 1987, 'I think generally the world is a just place') which are expressed in the present continuous tense and have been used empirically to explain decisions or judgments of past events. A Moyhidenni and Montada (1998) study on attitudes to the unemployed demonstrated that the SEJW construct could help predict whether people would make the situation just by taking action (for example joining a protest) versus using cognitive strategies like 'victim blame'. This study provides opportunity to explore the role of HJW and SEJW in predicting overseas charity support and donation. The following hypotheses are proposed:

H6: That Hope for a Just World (HJW) will affect people's level of claimed support for People Aid and claimed/actual donation versus giving to self/other charities.

H7: That Self Efficacy for a Just World (SEJW) will affect people's level of claimed support for People Aid and claimed/actual donation versus giving to self/other charities.

General Public Accuracy and Approval of Government Aid Spending Levels

In line with Simon's (1957) theory of bounded rationality, people are limited by their cognitive capacity for knowing and remembering facts and this is even truer about statistics and numbers. In areas like crime, people's perceptions are mismatched with crime statistics (Roberts & Stalans, 1997). Estimated statistics about racial components in society frequently overestimate dominant groups at a societal level while underestimating them at a local level (Wong, 2007). In the case of factual knowledge questions about the world, Nadeau & Niemi (1995) have argued that people can be mistaken in their estimate of facts because of an error in memory but also because they can rely on inference, curing and 'availability' to make 'educated guesses'. At the time of this experiment, April- May 2012, the Department of Foreign Affairs and Trade and Irish Aid was engaged in a public consultation as part of a White Paper review of the levels and scope of Irish Aid to developing countries (Irish Aid, 2012). This public consultation could mean that a broad sense of the level of Irish government overseas expenditure might be salient (Fiske and Taylor, 1984). It would be interesting to explore public awareness of Irish government expenditure on overseas aid and public approval of the level of expenditure on overseas aid at this time. The following hypothesis is proposed:

H8: That people are largely inaccurate in estimating the actual percentage of government expenditure on aid.

2. Method

Participants

Two hundred and thirty eight participants took place as part of a psychology experiment open to the general public. The mean age was 34 with an age range of 7 to 79. The gender ratio of female/male was 49:51 and 27.4% of the sample had children. 60.9% of the sample was Irish and further 18% was European (not Irish)- the remaining sample was mixed between North America, Africa and Asia.

Materials

There were four versions of the Framing Appeal which all used the same photograph, the same issue (child hunger), the same visual layout and the same end line for mythical overseas charity ‘People Aid’. The versions differed in the text used in the ‘appeal’ section of the stimulus – in terms of the content of the appeal (whether it was expressed as a short-term ‘Crisis’ or longer term ‘Development’ issue) and in terms of whether the appeal was focused on an ‘affect’ response (‘Sympathy’) or a calculated response (‘Deliberation’). The four versions of the texts are shown in Figure 7 below. (A full set of the visual stimulus is included in Appendix B).

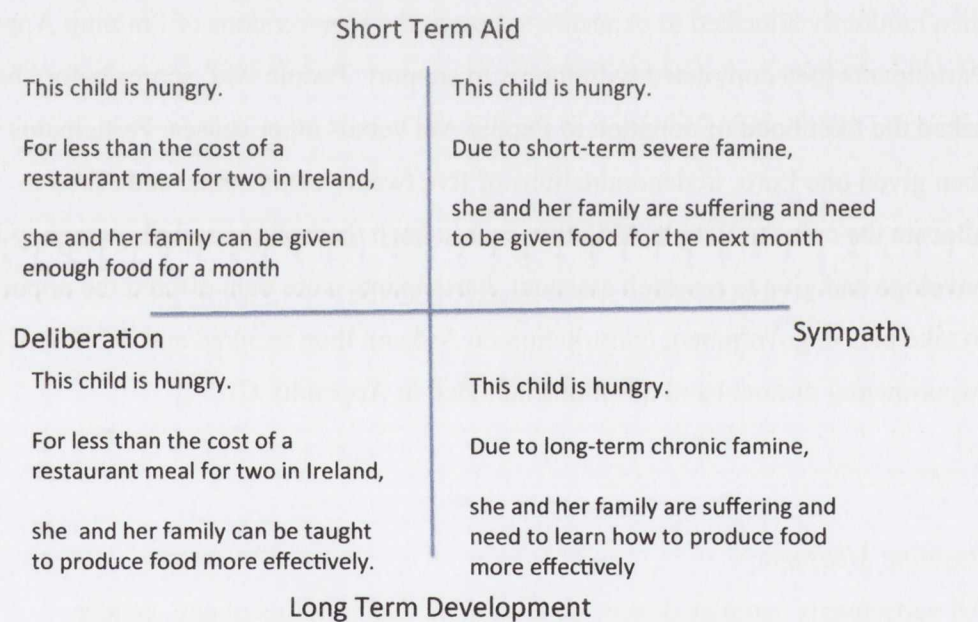


Figure 7 – The four versions of stimulus used to explore different message appeals in terms of content (crisis versus development) and processing style (affect versus calculated).

Piloting the Materials

The content of the text was tested with ten expert reviewers for ‘face validity’ to concur that the four different versions of the texts were different in terms of appeal and the response they were attempting to provoke. The four versions of the text were

emailed to a selection of ten doctoral researchers in the Centre of Global Health. Each person was also sent an empty grid (based on Figure X above) and asked to map the four versions of text onto one quadrant to the graph. All ten respondents placed the four versions of the text into the quadrants as depicted in Figure 7 above.

Procedure

Participants did the experiment in an individual and private computer booth in the Science Gallery in Trinity College Dublin. Participants first completed baseline measures and completed the structured questionnaires using Likert-scales, which were randomly presented to prevent order effects. Participants then completed the semantic differential questions around an Ideal Charity, in a random order. Participants were then randomly allocated to exposure to one of the four versions of Framing Appeal. Participants then completed willingness to support 'People Aid' scores before being asked the likelihood of donation to People Aid versus other causes. Participants were then given one Euro, in denominations of five twenty cents coins, and asked to allocate the coins to People Aid/other causes/keep themselves and place money in envelope and give to research assistant. Participants were then offered the opportunity to take part in government consultation on Aid and then thanked and debriefed. (Full experimental protocol and questions included in Appendix C).

Measures

Baseline Measures

All participants completed basic demographic data in terms of age, gender, nationality, employment, children, religiosity (on a five point scale), working for a charity in Ireland/overseas and donating to a charity in Ireland/overseas in the past three months. Analysis for internal reliability of the scales with this data set was conducted using Cronbach's Alpha measurement (Cronbach, 1951).

Brief Self Control Scale

The thirteen-item brief self control scale (Tagney, Baumeister & Boone, 2004) was used ($\alpha = .775$), Exemplar 'I am good at resisting temptation'. This scale is a shortened version of the 36-item Self – Control Scale (Tagney et al. 2004) and shows

a strong correlation ($r = .93$) with the full scale. It has been validated as having strong correlation with less impulsive eating and drinking patterns and optimal emotional responses (Tagney, Baumeister & Boone, 2004). The full version of the Brief Self-Control scale is included in Appendix C.

Single Item Religiosity Scale

A single-item subjective religious scale was used on a five-point scale. There is empirical evidence (for example Harper, 2007; Lewis, 2001) that religiosity as a meta-stereotype is related to pro-social behaviour. In broader terms, Saroglou, Delpierre and Dernelle (2004) conducted a meta-analysis of studies on religiosity and personality and found that the vast majority used one- or- few item measures of general, personal religiosity. It was also found that in many cases results based on general religiosity were valid, meaningful and similar to results based on multi-dimensional scales. The five-item religiosity scale is also included in Appendix C.

Single Item Happiness Scale

A single-item subjective happiness scale was used on a ten-point scale. The use of such single-item subjective scales has been validated within happiness research versus other subjective happiness scales (Abdel-Khalek, 2006). The scale is also included in Appendix C.

Hope/Efficacy for a Just World Scale

The sixteen- item hope/efficacy for a just world scale (Mohiyeddini & Montada, 1996) was used, featuring two eight-item subscales – Hope for Just World ($\alpha = .853$). (Exemplar, ‘I would like to see a world which is more generally just’) and Self Efficacy for a Just World ($\alpha = .857$). (Exemplar, ‘I can do things to help make the world more just’). The use of the two sub-scales have been previously validated as separate but related psychological variables where people who perceive themselves as having efficacy to create (more) justice in the world are more likely to give active support to social organisations which promote that ‘action’ goal than people who believe the justice is a worthy but practically infeasible notion (Mohiyeddini & Montada, 1998). The full versions of the two sub-scales are included in Appendix C.

'Ideal Charity' on Key Dimensions

Osgood, Suci and Tannenbaum (1957) and Dickson and Albaum (1977) have argued the importance of using tailor-made questions that have been derived from previous research. A forced choice set of eight questions was asked to look at how people chose between key potential dimensions of an 'ideal charity'. The forced choices included Irish recipients versus overseas recipients, passion versus professionalism, well known versus personally known, Irish origins versus overseas origins, emotional connection to issue versus expertise around issue, resource-rich versus resource – scarce, frugal spending versus accountability in results, explicit religious links versus explicit secular links. The full phrasing of the semantic differential questions is included in Appendix C.

Dependent Variables

Claimed Likelihood of support

Likelihood to support 'People Aid' was measured with eight items on a five point scale: 'If a charity like People Aid communicated with this type of approach, how likely would you be to give a €5 euro donation now/ give a €5 euro donation by direct debit/volunteer to fund-raise for People Aid/ volunteer to work with People Aid, tell others about People Aid/ leave a legacy to People Aid/ lobby the government to support People aid/lobby the government to remove support from People Aid'.

Claimed donation versus other causes

Participants were asked how they would allocate one Euro (expressed as five 20 cent coins) between the mythical charity 'People Aid', St. Vincent De Paul, an actual Irish charity that helps Irish people in need, the Science Gallery in Trinity or keeping the money themselves.

Actual donation versus other causes

Participants were asked to fill the envelope with the money they would donate from one Euro (expressed as five 20 cent coins) to be allocated between People Aid, St. Vincent de Paul (the Irish poverty charity), the Science Gallery or keep some or all of the money themselves.

Estimates of Irish Government Expenditure on Aid

Participants were then asked to estimate what percentage of the Irish Government expenditure is given to overseas Aid. In addition they were randomly asked whether this sum was too much/just right /too little and whether an additional €100, 000 should be given to overseas aid, poor at home or Science Gallery and whether a €100,000 cut in budget should come from overseas aid, poor at home or the Science Gallery

Design

The study had one independent variable (Framing Message Appeal) at four levels: the content of the appeal (short-term ‘Crisis’ versus longer-term ‘Development’) and the type of decision –making the appeal is targeting (affect-dominant ‘Sympathy’ versus calculating-dominant ‘Deliberation’). Participants were randomly assigned to conditions. The overall design of the experiment is depicted in Figure 8 below.

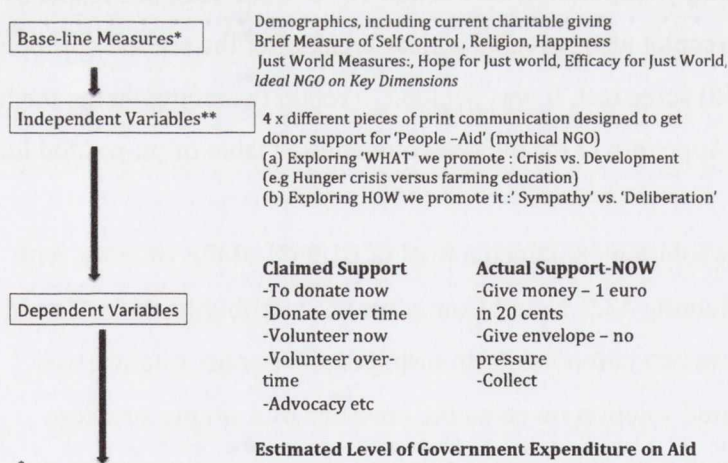


Figure 8 – Experimental design including baseline measures, independent variables and dependent variables

3. Results

Testing the Hypotheses: Step 1. Data Reduction –Support for People Aid

The eight items of Likely Support for People Aid and two items of claimed and actual donation to People Aid were subjected to Principal Components Analysis (PCA) using SPSS Version 20. Prior to performing PCA, the suitability of data for factor analysis was assessed. The sample size of 167 exceeded the minimum level of 150 (Tabachnick & Fidell, 2007) and the recommended minimum ratio of ten cases for each item (Nunnally, 1978). Inspection of the correlation matrix revealed the presence of many coefficients of .3 and above. The Kaiser-Meyer-Olkin value was .76, exceeding the recommended value of .6 (Kaiser, 1970, 1974) and Bartlett's Test of Sphericity reached statistical significance at $p < .05$, supporting the factorability of the correlation matrix. One item (lobbying government to remove support from People Aid, reverse coded) was removed due to lack of commonality with other items.

Principal components analysis revealed the presence of two components with eigenvalues exceeding 1, explaining 43.9% and 18 % of the variance respectively. An inspection of the screeplot also revealed a clear break after the second component. Using Catell's (1966) scree test, it was decided to retain two components for further investigation. (See Appendix D for the screeplot and the table of un-rotated loadings).

The two-component solution explained a total of 61.94% of the variance with Component 1 contributing 43.9 % and Component 2 contributing 18%. To aid in the interpretation of these two components an orthogonal Varimax rotation was performed. The rotated solution revealed the presence of a simple structure (Thurstone 1947), with both components showing strong loadings and all variables loading substantially on only one component. The interpretation of the two components is consistent with other behavioural economics studies where claimed judgments of support in *absolute* terms differ from behaviour when put in *relative* context of supporting other causes (in this case to allocate the money between People Aid, an Irish charity for the poor, St. Vincent de Paul, to give to Science Gallery or to keep the money oneself). This difference in decision-making in *absolute* versus *relative* contexts is in line with Thaler and Sunstein's (2008) findings around 'choice

architecture’ effects. There was a weak positive correlation between the two factors ($r = .248$), which supports the assumption that the two components are not related, as specified by the use of the Varimax rotation. The results of this factor analysis support the use of Intended Support (which is a judgment of likely support for People Aid in its own terms) and Actual Donation (which is relative support of People Aid versus other causes) as separate dependent variables within Support for People Aid. See Table 1 below:

Table 1: Degree of Support for People Aid (where 5= Highly Likely and 1 = Highly Unlikely)

Statements	Mean	SD	Factor	
			1	2
1. Give five euro donation now to PA	2.79	(1.37)	.71	
2. Give five euro direct debit to PA	2.38	(1.31)	.63	
3. Volunteer to fund raise for PA	2.34	(1.30)	.78	
4. Volunteer to work for PA	2.39	(1.34)	.74	
5. Tell others about PA	2.54	(1.45)	.73	
6. Leave a legacy to PA	2.10	(1.25)	.76	
7. Lobby government to support PA	2.13	(1.24)	.76	
8. Likely to give money (versus other causes)	1.62	(1.62)		
.89				
9. Actually give money (versus other causes)	1.58	(1.86)		
.86				
Eigenvalues			3.95	
1.62				
Variance			43.90	
18.02				

Testing the Hypotheses: Step 2. Data Reduction –Ideal Charity Semantic Differentials

The nine items representing Ideal Charity semantic differentials (which had been derived following the literature review, Chapter 1 and interviews with ten decision-makers in Oxfam, Chapter 2) were converted to Z-scores for comparability purposes. The transformed semantic differential items were subjected to Principal Components Analysis (PCA) using SPSS Version 20. Prior to performing PCA, the suitability of

data for factor analysis was assessed. The sample size of 212 exceeded the minimum level of 150 (Tabachnick & Fidell, 2007) and the recommended minimum ratio of ten cases for each item (Nunnally, 1978). Inspection of the correlation matrix revealed the presence of some correlations of 0.3 and above. . The Kaiser-Meyer-Okin value was .57, slightly under the recommended value of .6 (Kaiser, 1970, 1974) and Bartlett's Test of Sphericity reached statistical significance of $p < .001$ supporting the factorability of the correlation matrix.

Principal components analysis revealed the presence of four components with eigenvalues exceeding 1, explaining 20.10%, 15.58%, 12.89 % and 11.49 and of the variance respectively. An inspection of the screeplot revealed a clear break after the third component. Using Catell's (1966) scree test, it was decided to retain three components for further investigation. (See Appendix D for the screeplot and the table of un-rotated loadings).

The three-component solution explained a total of 48.70 % of the variance with Component 1 contributing 20.10 %, Component 2 contributing 15.52% and Component 3 contributing 13.10%. To aid in the interpretation of these three components both an orthogonal Varimax and an oblique Oblimin rotation were performed (See Appendix E). Both rotated solutions revealed the presence of a simple structure (Thurstone 1947), with the three components showing strong loadings and all variables loading primarily on only one component. This broadly supports an assumption that the three components can be interpreted as three separate factors underlying an ideal charity or pro-social initiative.

These three components appear to represent three separate dimensions of efficacy – Outcome Efficacy, which is about the long term impact of the charity, Self Efficacy which is around the donor making a personal difference, and System (Justice) Efficacy which is about the distributive justice goals and processes of the pro-social initiative (in terms of focus on the world poor, origin with local people and secular ethos.) The interpretation of the three components follows other research findings on the determinants of charitable giving: the importance of self-efficacy, altruism and long-term effectiveness of a charity (Oosterhof, Huevelman & Peters, 2009), and the importance of efficiency, altruism and charity purpose as factors for charitable giving

(Furnham, 1995). The results of this analysis support the use of Outcome Efficacy, Self-Efficacy, and System (Justice) Efficacy as three separate ideal charity (or pro-social) semantic differential factors. See Table 2 below:

Table 2- Mean scores, standard deviations and factor structure (using Varimax orthogonal structure) on the forced choice semantic differentials responses regarding 'Ideal Charity' dimensions on a seven- point scale.

Forced Choice Semantic Differentials on an Ideal Charity (seven point scale) (n= 205)				
	M	SD	F1	F2
<i>F3</i>				
Crisis Focus versus Development Focus	4.02	1.31	-.64	
Ireland Focus versus World Poor Focus	3.52	1.41		
.62				
Passionate versus Professional	3.18	1.40	.72	
Popular versus Personal Relevance	3.21	1.42		.31
Irish origin versus Local origin	3.54	1.45		
.71				
Emotional empathy versus Expertise	3.73	1.25	.61	
Well Resourced versus Scarce Resources	2.01	1.26		.50
Frugal with Spending versus Spending on Measurement	3.27	1.49		.37
Explicitly Religious versus Explicitly Secular	4.23	1.23		
.49				
Eigen Values			1.61	1.42
1.34				
Variance			17.89	15.83
14.8				

Testing the Hypotheses – Step 3 – Descriptive Data for the Mean and Standard Deviations for Intended Support and Actual Donation.

The mean and standard deviations of the two dependent variables for each of the four random experimental conditions (exposure to one version of the appeal - Crisis/Sympathy, Crisis/Deliberation, Development/Sympathy and Development/Deliberation) is shown in the table below (see Table 3 below).

Table 3 – Means and Standard Deviations of Intended Support and Actual Donations to People Aid within each framing condition

<u>Framing Condition</u>	N	<u>Intended Support</u>		<u>Actual Donation</u>	
		M	SD	M	SD
Crisis/Sympathy	55	2.25	0.88	2.00	1.55
Crisis/Deliberation	56	2.51	1.08	1.40	1.60
Development/Sympathy	48	2.37	0.90	1.73	1.80
Development/Deliberation	50	2.36	1.04	1.84	1.53

Testing the Hypotheses – Step 4 – Bivariate Correlations between demographic variables, dispositional variables, semantic differential factors and dependent variables – Intended Support and Actual Donation.

The relationship between demographic variables (gender), dispositional variables (happiness, religion, self control, hope for just world (HJW) and efficacy for just world (SEJW)), semantic differential factors for Ideal Charity (outcome efficacy, self-efficacy and system justice efficacy) and support for People Aid (as measured by Intended Support and Actual Donation) was investigated using Pearson product-moment correlation co-efficient. Preliminary analyses were performed to ensure no violation of the assumptions of normality, linearity and homoscedasticity. The correlations between these variables and Intended Support (where support of People Aid was measured in *absolute* terms) and Actual Donation (where support of People Aid is measured *relative* to other choices of donation) are shown below in Table 4.

There was a small (Cohen, 1988) positive correlation between gender and Intended Support where male gender was associated with higher intention to support People Aid than female gender ($r = .196, n = 209, p < .005$). There was a small (Cohen, 1988) negative correlation between Religion and Intended Support, ($r = -.218, n = 208, p < .005$) where low levels of religiosity were associated with higher likelihood to support People Aid. There was a small (Cohen, 1988) positive correlation between Just World Efficacy and Intended Support ($r = .234, n = 206, p < .005$), where higher belief in being able to impact a Just World were associated with higher likelihood to support People Aid. There was also a small (Cohen, 1988) negative correlation between the Outcome Efficacy semantic differential for Ideal Charity and Intended Support of

People Aid ($r = -.168, n = 205, p = .01$) As regards the second dependent variable Actual Donation, where there was a relative evaluation of People Aid versus other choices for donation, there was only one factor with a significant link to Actual Donation to People Aid. There was a small (Cohen, 1998) positive correlation between System-Justice Efficacy and Actual Donation to People Aid ($r = .225, n = 138, p < .01$). These bivariate correlations are shown in Table 4 below:

Table 4- Bivariate correlations between baseline and individual dispositional variables, semantic differential factors and Intended Support and Actual Donation to People Aid

	<u>Intended Support</u>	<u>Actual Donation</u>
<u>Baseline Variables</u>		
Gender	.20**	.01
<u>Individual Variables</u>		
Self Control	.08	.05
Religion	-.22**	.05
Happiness	.02	-.15
Hope for a Just World	.13	.16
Subjective Efficacy for Just World	.23**	.04
<u>Ideal Charity Semantic Differentials</u>		
Outcome Efficacy	-.17*	-.06
Self-Efficacy	.06	-.02
System-Justice Efficacy	.02	.23**

Note: $p < .01$, ** $p < .005$, *** $p < .001$.

Testing the Hypotheses- Step 5. Investigating the overall effect of the experimental framing on the dependent variables and any other significant effects from other variables.

A MANCOVA was conducted with experimental framing factors of cause (crisis versus development) and appeal (sympathy versus deliberation) as the IV's, the Intended Support and Actual Donation as the DV's. MANCOVA analysis was

selected as an appropriate and parsimonious analysis (Tabachnick & Fidell, 2007) because there was a small positive (Cohen, 1998) correlation between the two dependent variables, Intended Support and Actual Donation (($r = .225$, $n = 138$, $p = .016$). In addition, following Tabachnick and Fidell (2007), variables that were significantly correlated to either of the dependent variables (see Table 4 previous), were included as covariates in the MANCOVA. These covariate variables included gender, religion, self-control, subjective efficacy of a just world and outcome efficacy and system-justice efficacy as Ideal Charity Semantic differentials.

There was no evidence of message framing effects from the four random experimental conditions (exposure to one version of the appeal - Crisis/Sympathy, Crisis/Deliberation, Development/Sympathy and Development/Deliberation) on the two dependent variables – Intended Support for and Actual Donation to People Aid. The only covariate which had significant effect on Intended Support for People Aid was subjective efficacy for a just world (SEJW), $F(1, 133) = 9.79$, $p < .005$, where individuals who believed that it is possible to make a difference to the world's poor were more like to support People Aid in its own terms, irrespective of which experimental stimulus they had viewed. There were no covariates that had significant effects on Actual Donation to People Aid.

Testing the Hypotheses – Step 6 – Accuracy of estimates of percentage of State expenditure to overseas Aid and approval of level of expenditure

The estimates of government percentage of expenditure on overseas aid were broadly inaccurate. Extreme outliers of more than 2.5 standard deviations (Tabachnik & Fidell, 2007) were removed from the data. The mean ($n = 80$) was 4.64 % (S.D. = 5.26) with a median estimate of 3.0 and mode of 5.0. The range was 20 with a minimum estimated percentage of 0% and a maximum of 20%. The 25 –percentile was 0.7%, the 50-percentile was 3.0% and the 75-percentile was 5.0%. The kurtosis and skewness statistics were not significant and below the recommended threshold (Cohen 1988) of ± 1.96 . Kolmogorov – Smirnov and Shapiro Wilk tests were significant which indicated that the data distribution was not normal. The distribution of the estimated percentage of government expenditure on aid is shown in Figure 9 below:

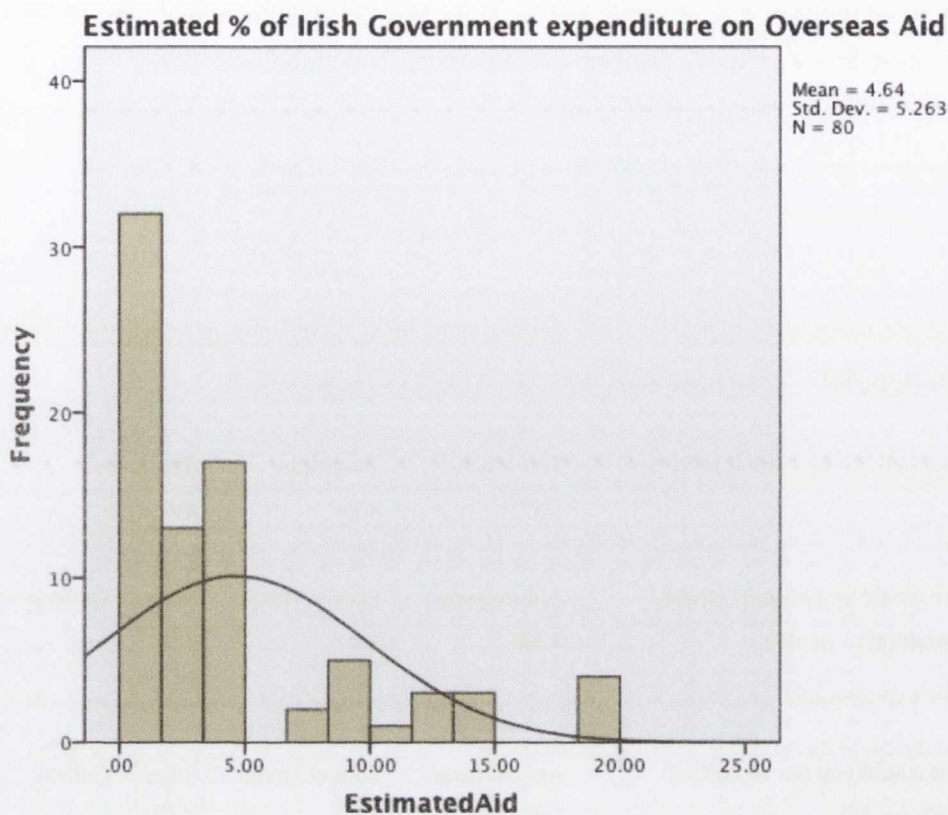


Figure 9 – The distribution curve of the frequency of participants (n=80) and corresponding estimates of the percentage of Irish government expenditure that goes to overseas aid.

The relationship between the estimated percentage of Irish government expenditure on overseas aid and demographic variables was investigated and there were no significant differences based on gender, age, having children or nationality. The relationship between estimated percentage of government expenditure on overseas aid, and dispositional variables (Religion, happiness, self-control, hope for just world and efficacy for just world) was investigated using Pearson product-moment correlation co-efficient. Preliminary analyses were performed to ensure no violations of normality, linearity and homoscedasticity. There were no significant correlations between dispositional variables, semantic differentials for Ideal Charity and estimated percentage of government expenditure on overseas aid.

People were also asked to what extent they approved of the level of government whether additional funds or funds reductions should be applied to overseas aid, the poor in Ireland or the Science Gallery in Trinity College Dublin. In light of the

skewed distribution of the data (see Figure 10), the median estimates of government aid corresponding with those answers are shown in Table 5 below:

Table 5 – Evaluations of the level of expenditure on overseas aid and how the correspond to median estimates of the percentage of Irish government expenditure on overseas aid.

<u>Approval of Government Level of Expenditure on Aid</u>	<u>Median Estimate of % Government Expenditure on Aid</u>		
1. Do you believe the current level is: (n=80)	Too Much 3.57	Just Right 4.96	Too Little 4.6
2. Where would you allocate €100K extra spending? (n=48)	Aid overseas 4.58	Poor at Home 5.2	Science Gallery 4.5
3. Where would you cut €100K of spending? (n=30)	Aid overseas 5.08	Poor at Home 2.5	Science Gallery 4.53

4. Discussion

This study provided no evidence of the effects of message framing in terms of appeals around short-term aid versus longer-term development and no evidence of message framing using appeals based on affect-laden or deliberative –laden decision- making. There was some evidence of individual psychological variables influencing the likelihood to support the overseas charity where there was a significant positive correlation between Subjective Efficacy in a Just World (SEJW) and Intended Support. There was no evidence of significant correlations between Self Control, Religion, Happiness or Hope for a Just World (HJW) with Intended Support of People Aid. There was also no evidence of significant correlation between the three factors of semantic differential within an Ideal Charity and Intended Support of People Aid. These correlations did not correspond to actual financial support of the charity when it was positioned within a broader ‘choice architecture ‘ (Thaler & Sunstein, 2008). The estimate of Irish government expenditure on aid was largely inaccurate with a median

estimate of 3% of total expenditure versus an actual 2012 level of 0.48% of Irish government expenditure on overseas aid (OECD, 2012).

Together these findings could provide some support for dual-system processing in decision-making around aid (Loewenstein & Small, 2007) but not completely in the manner that the original design intended. Contrary to prediction, there was no evidence of ‘surface’ framing effects in this experiment on either the basis of the content of the appeal (Crisis versus Development) or whether the appeal was focused on an affect response (‘Sympathy’) versus a calculated response (‘Deliberation’). It is possible that the labeling of the charity as ‘hypothetical’ combined with the deliberate use of a neutral image of the child ‘crowded out’ participants’ affective response and rendered the four versions of stimulus equivalent. This possible ‘crowding out’ of affective-response is partially supported by the fact that there was no relationship between trait-self control and responses to the different versions of stimulus. However the fact that participants did support the charity in the absence of an affect-ridden response provides evidence for charitable support in the absence of emotional sympathy, which was previously hypothesized by Small, Loewenstein and Slovic (2007) as a possibility within the dual –systems framework around aid decision-making. This possible mechanism for charity support is outlined below in Figure 11, on the (b) – (f) pathway.

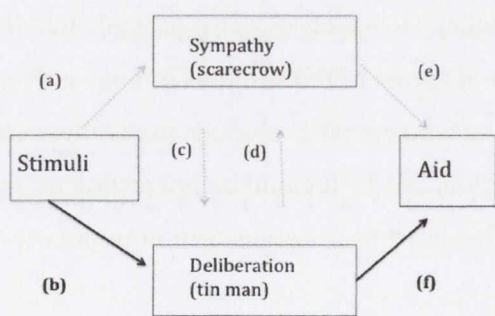


Figure 10 – Possible mechanism for aid decision-making in this experiment explained as pathway (b) – (f) following Loewenstein & Small ‘s (2007) perspective on aid decision-making.

The positive correlation between Self Efficacy for a Just World (SEJW) with Intended Support could be argued to support the dual-systems processing within a 'deeper frames' (Lakoff, 2006) context. In Just World terms, this experiment supports the two separate constructs (HJW, SEJW) proposed by Moyhidenni and Montada (1998) where intended donation to the hypothetical charity for the world's poor was significantly related to Self Efficacy for a Just World (SEJW) but was not significantly related to Hope for a Just World (HJW). As an individual psychological difference, Self Efficacy for a Just World can be seen as part of a personal values system (Rokeach, 1979). Previous research (Bennett, 2003) has found that congruence between personal values and perceived organizational values can be an important determinant of charitable donation. Previous structural equation modeling (Sargeant, Ford & West, 2005) has also found that common cause between participants and organization can be a key predictor of likely charity support. Values are an important determinant of moral cognition (Weber, 1993) and the contribution of personal values and shared purpose with intended support of this charity could be argued to fit within the deliberative or 'deservingness' calculations and evaluations that Loewenstein and Small (2007) have theorized within dual-systems processing.

There was no significant relationship between religion as measured by single-item religiosity and Intended Support for People Aid in this experiment. This absence of relationship might be explained in light of previous experimental evidence (Darley & Batson, 1973) that religious pro-sociality can be discriminating with regard to out-groups (for example the world's poor). However, it is also possible that the hypothetical and emotionally neutral nature of the stimulus did not active a reputational or guilt response in line with egoistic religious motivations (Batson, Schoenrade & Ventis, 1993; Saroglou, 2013). It could be interesting to investigate the relationship between trait-religiosity and out-group altruism in future experimental studies.

There was no significant relationship between happiness as measured by single-item happiness and intended support for the charity in this experiment despite correlations in previous research between happiness and generosity. It is likely that the single-item score of happiness (Abdel-Khalek, 2006) was measuring shorter term hedonic happiness, which has been described by Ryan and Deci (2001) as more empirical and

bottom-up as against a longer term eudemonistic happiness which is more top-down and focused on personal meaning. In dictator game experiments, Konow and Early (2008) tested the direction of causation between subjective wellbeing (SWB) and generosity and found that both variables were best explained by the tertiary personality variable, psychological wellbeing (PWB), a construct based on personal meaning and eudemonistic happiness.

It is likely that the difference between intended support of the charity actual support versus three other causes was a function of changing the frame of reference or altering what Thaler and Sunstein (2008) have called the 'choice architecture'. Behavioural choice experiments (Ariely, Loewenstein & Prelec, 2003) have found that framing choice versus other behaviours or referents has significantly altered people's preferences. It is possible the positive intention was 'split' in terms of final charity donation to People Aid, as a result of changing the 'choice architecture' and including other causes to support. This change in support may also have been compounded by asking participants to allocate support between a hypothetical overseas charity and a real and familiar local Irish charity, in the context of real financial donation.

The inaccurate estimates of government expenditure on overseas aid lend support to cognitive limitations in factual memory (Kahneman & Frederick, 2002; Simon, 1957) and the difficulty of retrieving statistics accurately. It is possible that participants over-estimated the percentage of aid because they have no personal experience of the expenditure on aid versus other government expenditure on health, policing or social welfare. Hertwig, Barron, Weber and Erev (2004) compared decision making between participants and found that participants over-estimated the probability of rare events when decisions were based on general descriptions but under-estimated the probability of rare events when decisions were based on personal experience. This finding could raise a bigger challenge for individual decision-making around aid where the donor is separated chronologically, geographically and culturally from the recipient, and when the 'experience' of the recipient is not directly observed by the donor (see Figure 1, Chapter 1).

The inaccuracy of estimates of government spending on aid reinforces Loewenstein and Small's (2007) concerns about the difficulty for individual aid donors to make

decisions that are satisfying emotionally but also deliberatively ‘reasonable’ and the potential difficulty for policy makers to rely exclusively on public opinion in making policy decisions. Ansolobere, Meredith and Snowberg (2013) investigated the feasibility of using quantitative research to get public input into economic factors. It was found that it was feasible to get useful and accurate estimates from the public on economic decisions, but it was important to phrase questions carefully, provide useful benchmarks and carefully synthesise findings from quantitative and qualitative questions. Nadeau and Niemi (1995) also found that individual motivation and ability meant that some people were more likely to be accurate in their estimates than others.

Limitations

The pilot process used to test the face –validity of the test materials was flawed in that it tested the versions of text used in each scenario, but did not show the four text versions in final context of image plus text. In retrospect, the full set of stimulus (including both image and text) should have been piloted with a small sample of the general public for communication. This would have allowed a comparison on what was being communicated in each of the four versions and whether there was any meaningful difference between the four in terms of face-validity in light of the research questions around message framing. Previous studies (for example Chang & Lee, 2007) have used different imagery to evoke different responses and pre-tested the different imagery in a pilot stage of the experiment. Experimental research has demonstrated that vivid imagery congruent with messaging can increase message processing (Smith & Shaffer, 2003) and behavioural effects (Chang & Lee, 2007).

It is likely that the visual stimulus, while deliberately featuring a ‘neutral’ image of a child to work with all four versions of stimulus, may have effectively operated as a hypothetical reference of a ‘needy African child’ rather than a concrete or identifiable person in need. Previous experimental research (Small & Lowenstein, 2003; Kogut and Ritov 2005a) has demonstrated that the use of ‘identifiable’ beneficiaries can increase the likelihood of donor support and the lack of an identifiable person within the visual stimulus may have reduced the affective power of the stimulus. There is also the possibility that the use of hypothetical stimulus referring explicitly to a

‘mythical’ charity and non-identifiable beneficiary may have combined with the laboratory context of the research (within a psychological experiments public exhibition) to trigger an over-riding sense deliberative decision-making which has been previously demonstrated to reduce sympathy and support for given charities or people in need (Small, Loewenstein & Slovic, 2007).

The ultimate balance between instrumentalism and realism (Slaney, 2012) is an important one and Furnham (1995) has argued in the past that inconclusive findings can be linked to aid stimulus that is too abstract. Familiarity has been shown to be an important criteria for people in responding to charity appeals (Zagefka, Noor & Brown, 2013) so there is a risk that ‘hypothetical’ experiments may minimize the scope for empathy. Structural equation models on real-world decision - making (Cheung & Chan, 2000; Oosterov, Huevelman & Peters, 2009) have found that trust in the actual charity and donation to the actual charity have significant relationships with intention to donate in the future.

There are also limitations around the question asking the public to estimate the level of government expenditure on overseas aid. It is possible that in the real world, people might have been more accurate in their estimate of government expenditure if they had been given more benchmarks or contexts (for example estimating the level of government expenditure on overseas aid versus domestic welfare, education, health etc.). Experimental laboratory research has consistently demonstrated that people can be very inaccurate in their judgments (Tversky & Kahneman, 1974) while in the real world it has been demonstrated that people can make good use of their causal knowledge when making judgments (Kyrnski & Tenenbaum, 2007; Sloman, 2005). There is also the possibility that people guessed with reckless abandon, in the absence of providing people with a ‘don’t know’ option for the question, as recommended by Hughes (1969) and Schuman and Presser (1981).

Implications for Theory

This research partially supports the dual-processing theory of Loewenstein and Small (2007) within the individual decision maker but it also raises the importance of better

understanding personal and shared values and purpose in making charitable decisions. The importance of purpose as an integrating construct has been proposed at the level of individual health (McKnight & Kashdan, 2009), organizational direction (Hoggett, 2006; Schein, 1960/1988) and societal coherence (Lakoff, 2008). Sears, Huddy & Schaffer (1986) have stressed the importance of 'symbolic commonality' in their investigations into voting preferences, Benabou and Triole (2006) have proposed a theory of 'collective beliefs' to link cultural ideology to individual attitudes to redistributive policies and Martinsson, Myrseth and Wollbrant (2012b) have found that priming people with a 'common interest' frame led to higher levels of generosity. Previous research into the determinants of charitable giving has highlighted the importance of common cause (Sargeant, Ford & West, 2005) and shared values (Bennet 2003) between the individual donor and the specific charity.

Following Carr (2003), this would argue for the importance of integrating culture, communication and context into investigations of decision-making in aid and adopting a framework that works at multiple levels of analysis including the personal, interpersonal, organizational and cultural (for example Sheldon, Cheng & Hilbert, 2011). Zagefka et al., (2012) have found that perceived Need of victim only predicts monetary donation if both the perceived Impact of a donation is high and the perceived Amount donated by others is small. Multiple levels are particularly important for charities, which represent a 'remote altruism' where the value of the giving from the donor's perspective is contingent on the perceived value to the recipient (MacMillan, Money, Money and Downing, 2005) and the perceived effectiveness of the charitable organization (Cheung & Chan, 2000; Oosterhof, Heuvelman & Peters, 2009; Sargeant, Ford & West, 2006).

This type of multi- level dynamic model framework allows for comparison of reductionistic versus holistic explanatory perspectives, which is an important dichotomy within scientific theorizing (Koestler & Smythies, 1969). An example of an expanded framework is proposed below in Figure 11. This framework seeks to integrate the possible relationships and inter-relationships between individual cognitive processes, following Loewenstein and Small (2007) but also seeks to incorporate the role of congruence between individual values and charity organization

values (Bennet, 2003) and overall cultural values and frames (Lakoff, 2006) around global justice.

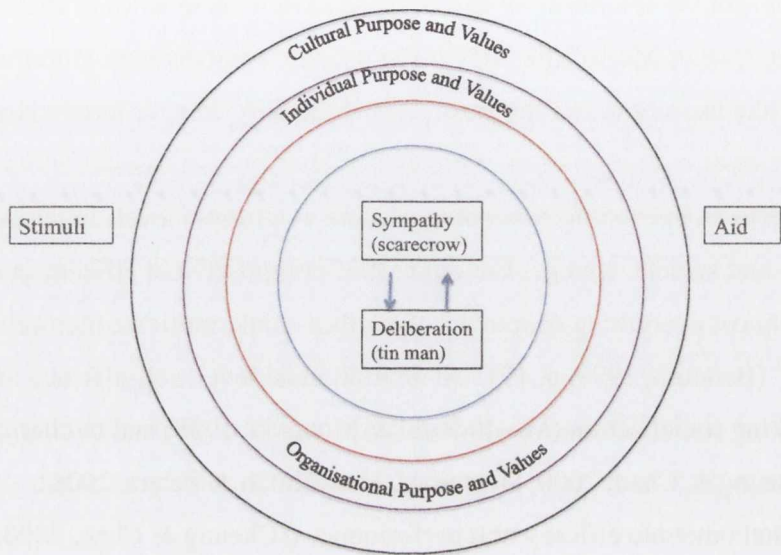


Figure 11 – Possible multi-level framework on decision-making in aid (building on Loewenstein & Small (2007) perspective, building in more levels of analysis.

Future Research

It is important that future research into dual-process decision making around aid investigates whether conflict between affective and deliberative processes is actually experienced (Aaker, Drolet & Griffin 2008). Martinsson, Myrseth and Wollbrant (2012b) implemented a perceptual framing manipulation to influence identification of self control in a public goods game and found that participants who perceived conflict exhibited higher levels of cooperation. In a similar vein, it is important to differentiate between the contributing roles of hedonic happiness and eudaimonistic happiness in future research on aid, altruism and charitable giving. It is possible that different forms of giving behavior correspond to different types of altruism along a spectrum from pure altruism (Becker, 1974) motivated by the benefit to the recipient, to ‘warm glow’ altruism (Andreoni, 1989), motivated by pleasurable feelings for the donor.

It is also important to conduct longitudinal research across the spectrum of altruism from helpful behavior to charitable giving to help ascertain the determinants that maximize altruism and social capital (Putnam, 2000). Specifically it is important to understand the relationships between giving and receiving help in the past with giving and openness to receiving help in the future (Ajzen, 2002b) and how this relates to multiple levels of values, meaning and purpose (Ariely, Kamenica & Prelec, 2009; MacLachlan, Carr & McAuliffe, 2010). The specific contributions of individual differences like happiness and religiosity to prosociality deserve more investigation.

Efficacy is also an interesting concept to explore at multiple levels in terms of prosociality and societal change. Bandura (1977) proposed that efficacy perceptions impact on almost everything people do, 'how they think, motivate themselves, feel, and behave' (Bandura, 1997, p. 19). At an individual level, self-efficacy have been linked to taking social action (Moyhidenni & Montada, 1998) and to charitable support (Cheung & Chan, 2000, Oosterhof, Heuvelman & Peters, 2008).

Organisational outcome efficacy and performance ((Cheung & Chan, 2000; Oosterhof, Heuvelman & Peters, 2009; Sargeant, Ford & West, 2008) also been linked to individual donation. In terms of larger global problems, Bandura (1986) proposed that collective efficacy might be an important pre-cursor to taking social action. Riggs and Knight (1994) investigated collective efficacy and collective outcome efficacy at an organizational level and found that both constructs correlated with a high degree of job satisfaction and organizational commitment. Bonniface and Henley (2008) explored both constructs in the context of environmental action and found that collective outcome efficacy was a key differentiator between activists and non-activists.

Implications for Practice

Following on from Lowenstein and Small (2007), in the real world it is possible that individual charity support decisions use a complex combination of Sympathy and Deliberation in line with dual-systems approach to social cognition. Whereas this experiment showed no effects from message framing applied to a neutral picture, previous research has indicated that there is a clear choice between framing appeals as

short-term crises versus longer-term development in terms of maximizing short-term donations. In broader terms the Aid and Development world (Darnton & Kirk, 2011) and NGO sector (Crompton, 2010), echoing Lakoff (2008), have questioned whether the wider framing of for broad global and societal goals has become over-transactional rather than transformational and is cumulatively undermining a the broader sense of common purpose and collective efficacy. In their own terms, crisis – ridden appeals may part potential donors with their money but it is worth the sector debating whether ‘smash and grab’ tactics undermine the very ‘moral capital’ (Kane, 2001) on which the sector is built. These questions become even more pertinent at a time when charity scandals are arising in certain countries, (Burke- Kennedy, 2013; Edelman Trust Barometer, 2012) and there is a great need for charities to increase public trust (nfp synergy, 2013).

At a policy level, this research also confirms that the public is largely inaccurate in their estimates of aid expenditure. In itself, the fact that the level is overstated could be taken as a tacit endorsement of higher levels of overseas development aid. However in other areas like war, voting and social welfare, Wong (2007) reminds us that public misperceptions of facts can affect summary judgments of future actions. In the case of overseas aid, which is not directly observed or experienced by the public in the developed world, the challenge for policy makers remains engaging with both the affective and deliberative processes of the public (Loewenstein & Small, 2007). The challenge for the development sector might lie in building a ‘compelling sticky story’, (Aaker & Smith, 2010), ‘gestalt’ experience (Ariely & Carmon, 2000) or ‘trustworthy picture’ (Lippmann, 1922) that increases our shared sense of collective outcome efficacy (Riggs & Knight, 1994) that helping the world’s poor is desirable, feasible and effective in the long-term. As Lippmann (1922) has expressed it:

‘The world that we have to deal with politically is out of reach, out of sight, out of mind. . . . Yet man . . . is learning to see with his mind vast portions of the world that he could never see, touch, smell, hear, or remember. Gradually he makes for himself a trustworthy picture inside his head of the world beyond his reach’, (Lippmann, 1922, p. 18).

Conclusion

It is important for charities to weigh up the potential trade-offs between communications that maximize short-term donations with communications that build longer-term support for the charity or NGO in question. This experiment investigated the influence of message framing in terms of whether the issue of child hunger was presented as short-term (crisis) or long term (development) and whether the appeal was more affective or deliberative in cognitive processing terms. The study found no evidence of effects from this surface framing (Lakoff, 2006) but there was some evidence that individual justice efficacy beliefs (SEJW), where people believe that it is possible to make a difference to global poverty, may have acted as a deep frame (Lakoff, 2006) in influencing the likelihood of supporting a charity focused on tackling child hunger. As operationalized in this experiment design, it appears that 'the map is not the territory' (Korby, 1931) or at least not in the way that it was expected to investigate dual-process decision-making (Loewenstein & Small, 2007). Hopefully the findings from this imperfect map, in combination with existing literature and research, can provide some insight into how future maps may better explore the important territory of decision-making around aid and how charity brands can better activate frames to socially engage stakeholders.

Chapter 5. Cultivating Kindness? - A multi-level longitudinal investigation into the dynamics of pro-social behaviour and the role of relational framing in pro-social engagement

Abstract

This research explores the relationship between kindness experienced and kindness potential over time and between variables on multiple levels (individual dispositional, collective identity beliefs and societal beliefs). A six-week national pro-social experiment (n= 3,309) administered by SMS provided an exploratory opportunity to investigate relationships between past kind deeds done or received and future intentions to give or request help, along with dispositional, collective identity and societal justice variables. In addition the pro-social experiment provided an opportunity to experimentally investigate the influence of relational framing (as operationalized by providing feedback of the previous weeks average results randomly to a third of the participants each week) on engagement with the pro-social initiative over time (as operationalized by continued voluntary participation over time). There were positive relationships between kindness experienced and kindness potential and dispositional variables, collective identity variables and societal justice variables. Exploratory multiple regression models were run to further investigate the relationship between past experience, trait variables, collective identity variables and societal justice beliefs on kindness experienced and kindness potential. A small amount of the variance in kindness experienced (kind deeds done and received) was explained by the model with age squared, average subjective well-being and religiosity making independent contributions to the model. A larger amount of the variance in kindness potential (likelihood to give or ask for help) was explained with kindness experienced, the change in satisfaction versus the previous week, average subjective well being, self-optimism, optimism about Ireland and societal extent of fairness all making significant independent contribution to the model. People who got feedback at any stage in the experiment were almost three times more likely to stay engaged with the voluntary pro-social initiative. The implications of these findings for theory, future research and policy are discussed.

1. Introduction

Individual acts of kindness have been argued to be the cornerstone of pro-social behaviour (Putnam, 2000) and a key component to the development of civil society (Aristotle) and workable democracy (de Tocqueville, 1835/1856). Helpful behavior between individuals has been argued to be an important precursor for societal trust and cohesion (Putnam, 2000), and organizational performance (Ehrhart & Naumann, 2004; Podsakoff, MacKenzie, Paine & Bachrach, 2000). Behavioural economists (for example Rachlin & Locey, 2011) have found evidence in multi-player one-shot prisoners dilemma games for altruistic behavior, where behavior benefits each of the other players at cost to the individual decision-maker. Within the principle of 'generalized reciprocity', Taylor (1982) has maintained that each individual act of help combines the benefits of short-term altruism and long-term self-interest. Kind behaviours may satisfy a basic need for relatedness (Baumeister & Leary, 1995) and are argued to be beneficial to both the giver and the receiver and contribute to the 'common good' (Layard, Clark & Senik, 2012).

The discovery of 'mirror neurons' for empathy in human brains has led Lakoff (2008) to conclude that humans are innately cognitively wired for empathy. There is evidence (for example Tomasello, 2009) that children have a natural tendency to help their peers and elders, and primatologist de Waal (2008) has found evidence that apes have a helping instinct, continuous with human make-up. Batson (2011) has proposed that there are four separate motivations behind pro-social behavior- egoism, altruism, collectivism and principlism, which can compete, cooperate and change according to specific situations. He defines egoism where the giver is motivated by their own welfare, altruism in which the giver is motivated by the recipient's welfare, collectivism in which the giver is motivated by shared collective identity and principlism where the giver is motivated by upholding a moral principle or standard. Mazar and Ariely (2006) have proposed that we are also innately motivated to punish dishonesty in others and unfairness in the system and that both these world-views can be activated to promote social good.

Fredrickson's (2001) 'broaden and build' theory has suggested that positive emotions broaden people's momentary thought-action repertoires, a process which in turn

builds intellectual, physical, social and psychological resources for the future. Positive psychologists Lyubomirsky, Sheldon and Schkade (2005) have proposed that intentionally giving and receiving kind behaviours can be a key component of sustaining long- term happiness. Otake et al. (2006) produced experimental evidence that kind people experience more happiness and have happier memories and that simply by counting kindness for one week, people can become happier and more grateful. Emmons and McCullough (2003) also demonstrated a reciprocal relationship between gratitude and happiness.

At a behavioural level, Rachlin and Locey (2011) have proposed three complementary explanations for observed altruistic behavior. The first explanation, following philosopher Derek Parfit (1984), proposes that an individual is motivated by discounting their current self versus their 'future-self' as a generous person and/or not being a 'free-loader' versus others or society. The second explanation proposes that historical behavior or a 'pattern of behaviour' builds 'soft commitment' to future behavior and people act according to a longer-term pattern of personal behavior rather than always calculating the costs and benefits of each potential kind act. Finally the third explanation proposes that people engage in social discounting where they engage in a straightforward balance between undiscounted costs to themselves (in terms of time, emotional energy, money) against discounted benefits to others across social distance. Rachlin and Locey (2011) have argued that these three explanations are complementary and could part explain the complex dynamics underlying patterns of altruistic behavior.

In Chapter 3, a research study investigated how ten NGO decision-makers construct brands and branding, and found that there were potential conflicts in whether brands can frame pro-social initiatives for social engagement, on four different levels: decision-making, collective identity, cultural legitimacy and system legitimacy. The findings, interpretations and analysis demonstrate that there is potential for 'brand' to lead to division, confusion and lack of coherence at all levels but also potential for 'brand to act as frame for 'multi-level coherence' and nudge engagement in a given pro-social initiative and its goals. In Chapter 4, a laboratory experiment found no evidence of the effect of surface message framing on donor support of a hypothetical overseas aid charity. However there was possible evidence of a relationship between

deep frames and intended support of the charity as evidenced by a positive relationship between Self Efficacy for a Just World (Moyhidenni & Montada, 1998) and intended support of the charity. It was argued, following Carr (2003) for the importance of integrating culture, communication and context into investigations of altruistic behavior. In addition, it was proposed that future research might include a framework that works at multiple levels of analysis including the personal, interpersonal and cultural (for example Sheldon, Cheng & Hilbert, 2011).

The National Happiness Experiment was a pioneering national study run to investigate multiple levels behavior, attitudes, identity and culture and explore their relationship with individual happiness over a six-week period in 2012. As part of this study, the relationship of kind deeds done and received and intentions to give or ask for help were investigated in relation to changes in mood, trait variables, collective identity beliefs and societal beliefs. This study provided an opportunity to investigate dynamic and multi-level relationships around kindness experienced and kindness intended within a naturalistic context. In addition, the pro-social experiment provided an opportunity to investigate the influence of relational framing (as operationalized by providing feedback of the previous weeks average results randomly to a third of the participants each week) on engagement with the pro-social initiative over time (as operationalized by continued voluntary participation in the National Happiness Experiment over the six week period).

Conceptual Background and Hypotheses

Kindness as Habit

The founding philosophers and psychologists (Aristotle; James, 1890; Dewey 1908/1932) have stressed the importance of intentionally cultivating virtuous behaviour as personal habits. Ajzen, (2002b) has found that in general the frequency of performed behaviour can be a good predictor of future behaviour. There has been mixed evidence in different contexts as to whether altruism is habit forming. Lindahl and Winship (1992) found in their investigation of alumni donations to Northwestern University that past giving was the strongest single factor in predicting future giving

but Auten, Sieg and Clotfelter (2002) found no relationship with historical giving in their panel analysis of tax-deductable charitable contributions. Liu and Aaker (2008) found that priming respondents with questions about donating time (the 'time-ask' effect) significantly increased financial donation to a specific charity. Rosen and Sims (2010) found that altruism in the young was the strongest predictor of both time and money donation at later stages of life. There is also experimental evidence that people who become more aware of the kindness they give also become more aware of the kindness that they receive (Otake et al., 2006). It is possible that kindness like other social behaviours will display a repeated pattern of what Rachlin and Locey (2011) call 'soft commitment' when the 'sunk cost' of adopting a behaviour leads to repeating that behaviour. This study will explore whether kind deeds given or received in one week have a relationship with likelihood to give or ask for help the following week. Overall, in terms of kindness as habit, the following hypothesis is proposed:

H1: That levels of kindness experienced (kind deeds done, kind deeds received) in one week will affect people's levels of kindness intended (to give or ask for help), the following week.

Kindness and Subjective Well Being

Psychologists have found evidence for strong experimental links between altruistic behavior and subjective well being where a subject is given an opportunity to aid others in a task or give money to charity (Harris & Smith, 1975; Isen, Horn & Rosenhan, 1973). Benson et al. (1980) have found a positive relationship between life satisfaction and a selection of helpful activities and Phelps (2001) has reported that people with altruistic personalities had greater levels of happiness. Thoits and Hewitt (2001) have used panel data to demonstrate links between volunteering and happiness levels. Positive psychologists, Boehm and Lyubomirsky (2006) have conducted a ten-week experiment, instructing students to conduct 'random acts of kindness' and found happiness levels were significantly higher than the control group, a gap maintained on a one-month follow up. Importantly, doing kind deeds does not only enhance subjective wellbeing, there is also evidence (for example Emmons &

McCullough, 2003) that practicing gratitude for kindness received also increases subjective wellbeing.

Frederickson (2001) has proposed a 'broaden and build' dynamic theory around positive emotions where experiences of positive emotions broaden people's momentary thought-action repertoires, which in turn serves to build their enduring personal resources, ranging from physical and intellectual resources to social and psychological resources. The causal relationship between happiness and generosity was investigated by Konow and Earley (2008) in dictator experiments and found that short-term happiness did not predict generosity but longer-term happiness had a significant relationship with generosity. This study will explore whether average subjective well-being and weekly changes in subjective wellbeing are related to kind deeds done or received in one week and the intention to give or ask for help the following week. Overall, in terms of subjective wellbeing, the following hypotheses are proposed:

H2a: That average subjective wellbeing will affect people's level of kindness experienced and kindness intended.

H2b: That weekly changes in subjective wellbeing will affect people's level of kindness experienced and kindness intended.

Kindness and Personal Resources

Following on from Fredrickson's (2001) 'broaden and build' theory, it would be interesting to explore whether psychological and physical resources are linked to experiences and intentions around kindness.

Optimism

Two decades of experiments conducted by Isen and colleagues (for a review see Isen, 2000) have documented that people experiencing positive affect (like optimism, subjective well being or success) broaden their cognition and predict global biases consistent with broadened attention (Basso, Schefft, Ris & Dember, 1996; Derryberry

& Tucker, 1994). An experimental intervention by Sheldon and Lyubomirsky (2006b) found that continued effort behind optimistic thinking predicted greater maintained change in subjective well being versus control groups. Munyon, Hochwarter, Perrewé and Ferris (2010) found that trait optimism was positively related to organizational citizenship behaviour (OCB) but that optimism moderated the relationship between OCB and job satisfaction, demonstrating a linear relationship for those high in optimism and non-linear relationship (i.e. assuming an inverted U-shaped form) for those low in optimism. In line with the 'broaden and build' hypothesis (Fredrickson, 2001), it would be interesting to explore whether self-rated optimism is related to kindness experienced or kindness potential in this study. The following hypothesis is proposed:

H3: That dispositional optimism will affect people's level of kindness experienced and kindness intended.

Perceived Health

Post (2005; 2007) has reviewed the evidence between altruism and mental and physical health and found positive links and there is evidence that altruism promotes longevity (for example Anderson, 2003). A study by Schwartz et al. (2003) found that both helping others and receiving help was associated with better mental health in terms of less depressive and anxiety symptoms. A longitudinal study conducted by Oman et al. (1999) over a ten-year period found that those who volunteered for one or more organisation had a 63% less chance of dying. Even when this was controlled for physical, psychological illness and social support, there was still a significant 44% less chance of dying for volunteers versus non-volunteers. Ironson, Solomon and Balbin (2002) found that helping others significantly increased the longevity of HIV patients. This study provides an opportunity to explore the relationship between kindness experienced, kindness intended and the perceived health of participants. The following hypothesis is proposed:

H4: That self-reported health will affect people's level of kindness experienced and kindness intended

Religiosity

Religion has an empirically complex link with altruism and charity (Monroe, 1996; Post et al., 2003) in practice, although a simple positive one in theory (Pessi, 2011). Many studies have found a positive correlation in the context of donating money (Hodgkinson, Weitzman & Kirsh, 1990; Lunn, Klay & Douglass, 2001) or blood donation (Healy, 2000). An analysis of World Values data from 53 countries by Ruiter and De Graaf (2006) found that religious attendance at an individual level predicted higher rates for volunteering in both religious and secular organizations. On the other hand, there have been studies (Hunsberger & Platonow, 1986; Lam, 2002; Park & Smith, 2000) that have found no connection between religiosity and volunteerism. Saroglou (2010) has argued that link between religion and pro-social behavior may be complicated by other dimensions of morality – in-group versus out-group beneficiaries, the importance of ‘good deeds’ versus other religious practices (for example church attendance) and trade-offs between moral values like ‘compassion’ versus ‘conscientiousness’. Previous experimental research (Chapter 4, this volume) found no positive relationship between religiosity and intention to donate to a hypothetical overseas charity. This naturalistic study will investigate whether trait religiosity is related to kindness experienced and kindness intended. The following hypothesis is proposed:

H5: That trait religiosity will affect people’s level of kindness experienced and people’s kindness intended.

Kindness and Collective Identity

Collective identity has been defined by Polletta and Jasper (2001) as an individual’s cognitive, moral and emotional connection with a broader community, category, practice or institution. It is a perception of a shared status or relation, which may be imagined rather than experienced directly and it is distinct from personal identity, although it may form part of personal identity. Social identity theory (Tajfel, 1978) has proposed that the mere awareness of belonging to a group engenders positive feelings about that group and increases the likelihood of acting on behalf of group members even if they are unknown to you on a personal level. Miller (1995) has

argued that the moral value of a strong national identity is that it fosters diffuse feelings of sympathy and obligation to fellow citizens.

Batson (2011) has cited evidence from laboratory research and real life that in many conditions people do not merely choose to maximize personal welfare but also to enhance group welfare. There is evidence that in social dilemma research (Dawes, van de Kragt & Orbell 1990; Orbell, van de Kragt & Dawes, 1988) that if group members discuss social dilemmas with other members they give more to the group than if they had no prior discussion. Behavioural economists Martinsson, Myrseth and Wollbrant (2010) have also manipulated the increased sense of collective identity in public goods dictator games by priming respondents with interrelated calendar grids versus isolated grids.

On the other hand, social identity theory (Tajfel & Turner, 1986) has found evidence of selective altruism for 'in-groups' versus 'out-groups'. De Figueiredo and Elkins (2003) investigated the factor structure of pride across six data-sets, 50 countries and a variety of sub-samples and found that it comprised of two separate factors, patriotism which was love of one's country and nationalism which included a dislike of immigrants. Accepting the national identity can be a slippery research subject, Citrin, Wong and Duff (2001) have nonetheless argued that is important to explore the intensity of national identification and to what extent it is a statement of legal fact versus a badge of emotional pride. This study provides an opportunity to investigate whether measures of positive collective identity are broadly related to overall kind deeds experienced or intended. Overall, in terms of collective identity beliefs, the following hypotheses are proposed:

H6a: That self-reported pride in Irish identity will affect people's level of kindness experienced and kindness intended.

H6b: That self-reported European identity will affect people's level of kindness experienced and kindness intended.

H6c: That self-reported belief in a unique valuable Irish identity will affect people's level of kindness experienced and kindness intended.

H6d: That perceived optimism about Ireland's future will affect people's level of kindness experienced and kindness intended.

Kindness and Societal Justice

According to the Just World Hypothesis (Lerner & Miller, 1978), people have an inherent motivation to believe that the world is 'just' so they will make sense of past events or their own decisions by blaming victims, down-grading situations in order to justify the outcome, or taking action to make the situation more 'just'. Developmental psychologists Schmidt and Sommerville (2011) have found evidence of sensitivity to fairness and altruistic behaviour in 15-month old infants and argue that human egalitarianism plays an important evolutionary role in the development of cooperative behaviours. Behavioural economists ((Andreoni & Miller, 2002; Cox, 2004; Tan & Bolle, 2006) have found that the aversion of inequality along with altruism can explain allocations of money in dictator games. In a review of experimental evidence around other-regarding behaviour, Fehr & Schmidt (2006) found that inequity aversion was a strong contributor to generous allocations. Mazar and Ariely (2006) have proposed that we are also innately motivated to punish dishonesty in others and unfairness in the system and that both these world-views can be activated to promote social good.

Rothstein & Uslaner (2005) conducted structural equation modeling on global societal data and found that the level of inequality is a causal determinant of generalized trust and civic solidarity. Rothstein (2011) has also argued powerfully that honesty in public administration (low corruption and the rule of law in the public administration) can cause individuals in the society to believe that their pro-social behavior will translate into beneficent outcomes for society. This study provides the opportunity to investigate the relationship between societal justice beliefs around fairness and (lack of) accountability and acts of kindness experienced and anticipated. Overall, the following hypotheses are proposed:

H7a: That the perceived level of fairness in society will affect people's level of kindness experienced and kindness intended.

H7a: That the perceived degree of accountability for the powerful will affect people's level of kindness experienced and kindness intended.

Framing Relational Exchange and pro-social engagement

Belk (2005) has argued that different types of social exchange have different implications for social identity and social norms. McGraw and Tetlock (2005) have experimentally demonstrated that different types of relational exchange have different social and moral norms in terms of relationships and expected behaviour. In the context of brands as relational exchange, Aggerwal (2004) has previously demonstrated that customers have different expectations of a financial brand in terms of behaviour and incentives depending on whether they perceive the relationship as based on a sense of commonality (communal exchange) or commodity (market exchange). Ariely, Kamenica and Prelec (2009) have found that providing participants with a minimum acknowledgement of their task, significantly decreased the financial compensation requested for the task, and argued that feedback acts as a source of meaning and increases intrinsic motivation (Ryan & Deci, 2001). It would be interesting to explore the role of providing group feedback within a pro-social initiative in terms of participant engagement and commitment. Overall in terms of the potential role of feedback in relational framing and participant engagement, the following hypothesis is proposed:

H8: The randomized weekly feedback of the average results of the previous week will affect participant engagement in terms of continued commitment to the voluntary pro-social initiative.

2.1 Design

This study utilized a longitudinal naturalistic design, across six weeks. The questions were administered by SMS with benchmark questions on self-rated happiness and satisfaction every week and a selection of other questions each week. The questions were designed to probe different inter-related aspects of happiness and satisfaction

and their relationships to each other. The specific questions relating to kindness took place in Week 5 (kind deeds done, kind deeds received) and Week 6 (likely to help others, likely to ask for help).

2.2. Participants.

3,309 people took part in the study. The sample was predominantly female (76%) and the average age was 45.3 years ($SD = 13.4$, range 18-84). One half of the sample was between age 40 and 59. One third (33%) were not a parent, just over half were either a parent or grandparent (52%), with the remainder being both a parent and a grandparent (15%).

2.3 Materials

This experiment was SMS-based and designed to work within the restrictions of the medium. For example: using the following 1-10 rating scale: where 1 = “not at all”, and 10 = “very much so”, on a scale of 1-10 how happy do you feel now? (Numerical reply only) (To see the full survey see Appendix F). Participants answered each question before being sent another question. Data was stored securely by the Phonovation website before being downloaded by the researchers.

2.4 Procedure

The sample was recruited as a result of Science Gallery publicity and radio and press interviews across Ireland, which explained that the study was trying to explore factors and contributors behind happiness in Ireland. In order to sign up, they had to text the word ‘Mood’ and the county where they lived in Ireland. Volunteers were reassured that their personal data was anonymous and that participation was free. The study ran over six weeks and each week questions were sent out on a Thursday via SMS. Once the first question was answered, it was acknowledged and the second question was sent. The number of questions varied between 5 and 8 each week. There was a randomized ‘feedback’ experiment conducted each week where a random third of the sample got feedback on the average level of happiness and satisfaction for the total sample the previous week. Participants were made aware that the previous weeks data was available for them to view on www.sciencegallery.com/happy/nationalexperiment

The entire study took approximately five minutes to complete each week. Data collection began on 24/05/2012 and finished on 28/06/2012. The project had ethical approval from Trinity College Dublin Psychology. Ethics Committee.

2.5 Measures

Robins, Hendin & Trzesniewski (2001a) have argued that the use of short instruments can be justified in the case of large-scale surveys and longitudinal studies. In addition, all measures in this study were designed to be succinct in keeping with the methodological constraints of SMS. In the case of demographics – answers were designed to be either numerical, or Yes/No, Male/Female to allow for easy response and lower the burden of participation. In the case of variables, single-item 10 –point scales have been used throughout to allow for respondent consistency across questions and over time.

There is mixed evidence around pro-social behaviour and gender. Eagly and Crowley (1986) conducted a meta-analysis of social psychological literature and found that there were gender differences around different types of helping behaviour where men were more likely to help strangers in a ‘heroic’ manner whereas women were more likely to help friends, family and neighbours. Andreoni and Vesterlund (2001) conducted dictator games and found men were more likely to be helpful when helping was ‘cheap’ but women more likely to help when helping was more ‘expensive’. Baskerville et al. (2000) found that women were more likely than men to appreciate random acts of kindness. There is evidence that pro-social behaviour increase with age (for example Rushton et al., 1989) but some studies failed to find a significant age difference in the appreciation of kindness (Baskerville et al., 2000). The demographic measures used in this study are shown below:

Demographics. People were asked their gender, age, and whether they were a parent or grandparent.

Recently there has been evidence that single-item scales have been validated as possible measures in personality research versus previous multi-item scales (for example Woods & Hampson, 2006). At the same time, there is a concern that single-

item scales cannot demonstrate internal psychometric reliability (Nunnally, 1967). Wanous & Reichers (1996) tested single-item measures of job satisfactions versus multi-item measures with robust levels of internal reliability and concluded that single-item measures could potentially satisfy minimum levels of reliability. Wanous et al. (1997) conducted a meta-analysis of single-item measures around job satisfaction and concluded that single-item scales can be reliable measures in the context of certain research questions. In a general sense, the exploratory and voluntary design of this research study can justify the use of single-item measures throughout. Additionally, in the case of specific constructs, the arguments, evidence and caveats for using single-item measures are discussed below:

Kindness Variables

There is evidence (for example Rushton, Chrisjohn & Fekken, 1981) that self-report altruism has predicted peer-ratings of altruism, organ-donor cards and other pro-social orientations. Previous studies investigating kind behaviour (for example Otake et al., 2006) have used simple single-item self-report instruments to measure the incidence and prevalence of kind deeds. The specific kindness measures used in this study are shown below:

Week 5 (quantity of kind deeds, numbers)

Kind Deeds Done – How many kind deeds have you done today?

Kind Deeds Received – How many kind deeds have you received today (that you are aware of)?

Week 6 (likelihood of kind deeds, on a one –to-ten scale)

Intention to do Kind Deeds – How likely would you be to do a kind deed for someone today?

Willingness to ask for Kindness - How likely would you be to ask for help from others if you needed it?

Repeated Dispositional Variables (over the six weeks)

Happiness /Satisfaction

The use of a single-item subjective scale has been validated as a happiness measure (Abdel-Khalek, 2006). The 11-point scale was found to have significant positive correlations with the Oxford Happiness Inventory (OHI; Argyle, Martin, & Lu, 1995; Hills & Argyle, 1998) and the Satisfaction with Life Scale (Diener, Emmons, Larsen, & Griffin, 1985; Pavot & Diener, 1993), denoting good concurrent validity. It also had strong concurrent validity with optimism, hope, self-esteem, positive affect, extraversion, and self-ratings of both physical and mental health. Furthermore, the divergent validity of the single item has been adequately demonstrated through its significant and negative correlations with anxiety, pessimism, negative affect, and insomnia. There is evidence from world-wide happiness research (Helliwell, Layard & Sachs, 2013; 2015) that self-reported happiness and life-satisfaction can be related to slightly different aspects of personal well-being. In particular, happiness can relate to more short-term mood-based aspects of subjective well being whereas life-satisfactions can relate to longer-term and evaluative aspects of subjective well-being. Single-item measures have previously been used to assess such constructs as life-satisfaction (Campbell, Converse, & Rodgers, 1976) and subjective well-being (Diener, 1984; Sandvik, Diener, & Seidlitz, 1993). The repeated measures of happiness and satisfaction used in this study are shown below:

Happiness. A single –item question was administered to people ‘on a one to ten scale, how happy do you feel now?’

Satisfaction. A single –item question was administered to people ‘on a one to ten scale, how satisfied with life in general, do you feel’?

Other Variables (single-item variables on a one-to-ten Likert scale)

Other Dispositional Variables

Optimism (Self)

Scheier and Carver (1985) initially conceptualized dispositional optimism as being a single bipolar trait, with optimism at one end and pessimism at the other. Most people working in the field still continue to construe optimism and pessimism in this fashion and analyze their studies accordingly. However, a number of researchers (for example Kubzansky et al., 2004) have explored the possibility that optimism and pessimism are somewhat distinct constructs. This view is consistent with the fact that scales of generalized optimism are often shown to comprise two separate components (Kubzansky et al. 2004; Scheier & Carver, 1985; Scheier, Carver & Bridges, 1994) - one measuring the person's expectancies for positive outcomes (i.e., his or her optimism) and one measuring the person's expectancies for negative outcomes (i.e., his or her pessimism). Rasmussen, Scheier and Greenhouse's (2009) recent meta-analysis of the relationship between optimism and physical health outcomes found no significant difference between the optimism and pessimism sub-scales. In the case of optimism, the specific measure used in this study is shown below:

Optimism (Self) – How optimistic do you feel about your future? (W6)

Perceived Health

Bowling (2005) has argued that there is validity in using single-item self-report scales in health research to complement multi-item scales in order to minimize respondent burden and administrative cost. De Salvo et al. (2006) assessed the measurement properties of two single-item general health measures and found that both measures demonstrated good reproducibility, reliability and strong concurrent and discriminant scale performance with established health status measures. These measures were five-point scales but in this research a 10- point scale is used to allow for overall consistency within the study. The self-reported health measure used in this study is shown below:

Perceived Health – How healthy do you feel? (W6)

Religiosity

Saroglou, Delpierre and Dernelle (2004) conducted a meta-analysis of studies on religiosity and personality and found that the vast majority used one- or- few item measures of general, personal religiosity. It was also found that in many cases results based on general religiosity were valid, meaningful and similar to results based on multi-dimensional scales. The self-reported religiosity measure used in this study is shown below:

Religiosity – How religious would you say you are? (W3)

Collective Identity Beliefs

In terms of collective identity beliefs it could be argued, following Lyubomirsky, Dickerhoof, Boehm and Sheldon (2009) that these variables are by definition subjective constructs so self- reports are the gold standard. Single-item measures of cultural and ethnic identity have been used by Benet-Martinez, Leu, Lee, and Morris (2002). In this research four single-item measures are used to explore different aspects of collective identity, Irish pride, European pride, belief in a unique valuable Irish identity and optimism about Ireland's future. The four collective identity measures used in this study are shown below:

Pride (Irish) – How proud to be Irish do you feel? (W2)

Pride (European) – How proud to be European do you feel? (W2)

Unique Identity – In general do you feel that Ireland has a unique and valuable identity? (W3)

Optimism (Ireland) – How optimistic do you feel about Ireland's future? (W6)

Societal Justice Beliefs

Within organizational justice, there has been debate as to whether 'belief in a just world' can be reduced to a homogenous single-factor (for example Loo, 2001). In

terms of the six-item scale developed by Dalbert et al. (1987), based on several years' psychometric work, Dalbert has concluded that the six items do form a homogeneous scale (Dalbert and Katona-Sallay, 1996). In contrast the Rubin and Peplau (1973; 1975) 20-item scale has been seen to be more heterogeneous. Across studies, factors do not appear to replicate except for the orthogonal two-factor solution where items divided into belief in a just world (11 items) and belief in an unjust world (nine items). This split was proposed by Furnham (1985) and has been supported in other studies (Furnham & Procter, 1989; Mohr & Luscri, 1995; Stowers & Durm, 1998). This research seeks to explore two factors of belief in a just world and belief in an unjust world using two single-item measures around perceived fairness and perceived (lack) of accountability. The two societal justice measures used in this study are shown below:

Fairness – In general, would you say Ireland is a fair place? (W3)

Accountability – In general, do you feel that powerful people are kept in check by media, law and public opinion? (W3)

Randomised Feedback

Each week one third of the participants were selected to get randomized feedback on the previous week's average results, at the end of completing that week's questions. Examples of the exact text of the messages for week 2 are shown below.

Control Group: Thanks for taking the time to answer this week's questions. We will contact you next week for more information. Visit www.sciencegallery.com/happy/nationalexperiment for some of the results from the National Happiness Experiment.

Experimental Feedback Group: Thanks for taking the time to answer this week's questions. We will contact you next week for more information. In week 1, the average happiness score was 7.02 and the average life satisfaction score was 6.7. Visit www.sciencegallery.com/happy/nationalexperiment for some of the other results from the National Happiness Experiment.

The full set of questions for the six weeks is included in Appendix G

3. Results

The means, standard deviations and range of the relevant variables are outlined below in Table 6:

Table 6- Descriptive data (mean and standard deviations for key variables)

Statements* (n= 3309)	N	Mean	SD	Min- Max
<u>Kindness Variables</u>				
Kind deeds done (W5)	2506	2.70	3.11	(0-99)
Kind deeds received (W5)	2438	2.04	3.65	(0-100)
Likelihood to help others (W6)	2505	7.70	2.32	(1-10)
Likelihood to ask for help (W6)	2459	6.19	2.67	(1-10)
<u>Mood difference Variables</u>				
Week 5 versus week 4 happiness	2572	-.03	1.92	(-9 - +9)
Week 5 versus week 4 satisfaction	2443	.06	1.50	(-9 - +9)
Week 6 versus week 5 happiness	2506	-.10	1.91	(-9 - +8)
Week 6 versus week 5 satisfaction	2363	-.04	1.41	(-7 - +9)
<u>Individual Dispositional Variables</u>				
Average Happiness	2238	6.79	1.42	(1-10)
Average Life Satisfaction	1950	6.66	1.57	(1-10)
Self-optimism (W6)	2417	6.76	2.05	(1-10)
Perceived Health (W6)	2323	6.88	1.87	(1-10)
Religiosity (W3)	2502	4.5	2.65	(1-10)
<u>Social Identity Beliefs</u>				
Irish pride (W2)	2640	7.29	2.25	(1-10)
European pride (W2)	2578	5.42	2.42	(1-10)
Unique valuable identity (W3)	2439	7.53	2.19	(1-10)
Optimism about Ireland (W6)	2363	5.61	2.01	(1-10)
<u>Societal Justice Beliefs</u>				
Fairness (W3)	2605	5.14	2.22	(1-10)
Accountability (W3)	2508	3.79	2.21	(1-10)

* All statements are measured on ten-point Likert scales, except kind deeds done and kind deeds received which are measured in quantity.

In week 5, the mean level of kind deeds done was 2.70 (*SD* = 3.21) and the mean level of kind deeds received was 2.01 (*SD* = 3.59). In week six the mean likelihood to help others on a ten-point scale was 7.64 (*SD* = 2.38) and the mean likelihood to ask for help on a ten-point scale was 6.18 (*SD* = 2.70). The means and standard deviations are shown in Table 7 below:

Table 7 – Means and Standard Deviations of Kind Deeds Done, Kind Deeds Received, Likelihood of Helping Others and Likelihood of Asking for Help. (n = 2136)

Individual kindness experienced and intentions	Mean	<i>SD</i>
Kind deeds done (W5)	2.70	(3.21)
Kind deeds received (W5)	2.01	(3.59)
Likely to Help Others (W6)	7.64	(2.38)
Likely to Ask for Help (W6)	6.18	(2.70)

The correlations between kind deeds done and received and likelihood to help or ask for help from others are shown in Table 8 below:

Table 8 - Bivariate correlations between kind deeds done and received (numbers) and future intention to give or ask for help (ten-point Likert Scale) (n = 2136)

	Deeds done	Deeds received	Likely to help	Likely to
ask	(W5)	(W5)	(W6)	(W6)
Kind deeds done (W5)		.66***	.14**	.05*
Kind deeds received (W5)			.10**	.09**
Likely to Help Others (W6)				.25**
Likely to Ask for Help (W6)				
Mean	2.70	2.01	7.64	6.18
Standard Deviation	(3.21)	(3.59)	(2.38)	(2.70)

Note: **p* < .05, ***p* < .01, ****p* < .001,

Testing the Hypotheses – Step 1 – Data reduction on kindness variables

The four items of Kind Deeds Done, Kind Deeds Received, Likelihood to Help and Likelihood to Ask for Help were subjected to Principal Components Analysis (PCA) using SPSS Version 20. Prior to performing PCA, the suitability of data for factor analysis was assessed. The sample size of 3309 far exceeded the minimum level of 150 (Tabachnick & Fidell, 2007) and the recommended minimum ratio of ten cases for each item (Nunnally, 1978). Inspection of the correlation matrix revealed the presence of many coefficients of .3 and above. The Kaiser-Meyer-Olkin value was .511, slightly lower than the recommended value of .6 (Kaiser, 1970; 1974) but the Bartlett's Test of Sphericity was statistically significant at $p \leq .00$, supporting the factorability of the correlation matrix due to lack of commonality with other items.

Principal components analysis revealed the presence of two components with eigenvalues exceeding 1, explaining 43.9% and 18 % of the variance respectively. An inspection of the screeplot also revealed a clear break after the second component. Using Catell's (1966) scree test, it was decided to retain two components for further investigation. (See Appendix G for the screeplot and the table of unrotated loadings).

The two-component solution explained a total of 72.96% of the variance with Component 1 contributing 41.6 % and Component 2 contributing 31.3%. There was moderate positive correlation between the two factors so an oblique Oblimin rotation was performed. The rotated solution revealed the presence of a simple structure (Thurstone, 1947), with both components showing strong loadings and all variables loading substantially on only one component. (See Table 9 below). The interpretation of the two components is consistent with other research into kind behaviour and intentions (Otake et al., 2006; Rachlin & Locey, 2011). The results of this analysis support the use of Kindness Experienced and Kindness Potential as separate but also interdependent variables within overall Kindness Capital. (See Appendix G for the Pattern Matrix and Structure Matrix).

Table 9 - Kind deeds done, kind deeds received (numbers), liklikeness to help and likeliness to ask for help (on a ten-point Likert Scale)

Statements (n= 3309)	Mean	SD	Factor*	
			1	2
1. Kind deeds done (W5)	2.70	(3.21)	.91	
2. Kind deeds received (W5)	2.01	(3.59)	.91	
3. Likeliness to help others (W6)	7.64	(2.38)		.77
4. Likeliness to ask for help (W6)	6.18	(2.70)		.81
Eigenvalues			1.74	1.18
Variance			41.6	31.3

*Factors based on an Oblimin rotation with Kaiser normalization.

Testing the Hypotheses – Step 2 – Links between Demographic Variables and Kindness Experienced and Kindness Potential

A Spearman rank order coefficient correlation analysis was conducted to see whether any of the demographic or baseline variables were related to the dependent variables – Kindness Experienced and Kindness Potential. There was a significant non-linear relationship between age category and Kindness Experienced (Spearman rho = .10, $p < .001$) and the mean level of this variable across the different age categories displayed a U-shaped curve (see Figure 12 below). There was no significant relationship based on age-category and Kindness Potential.

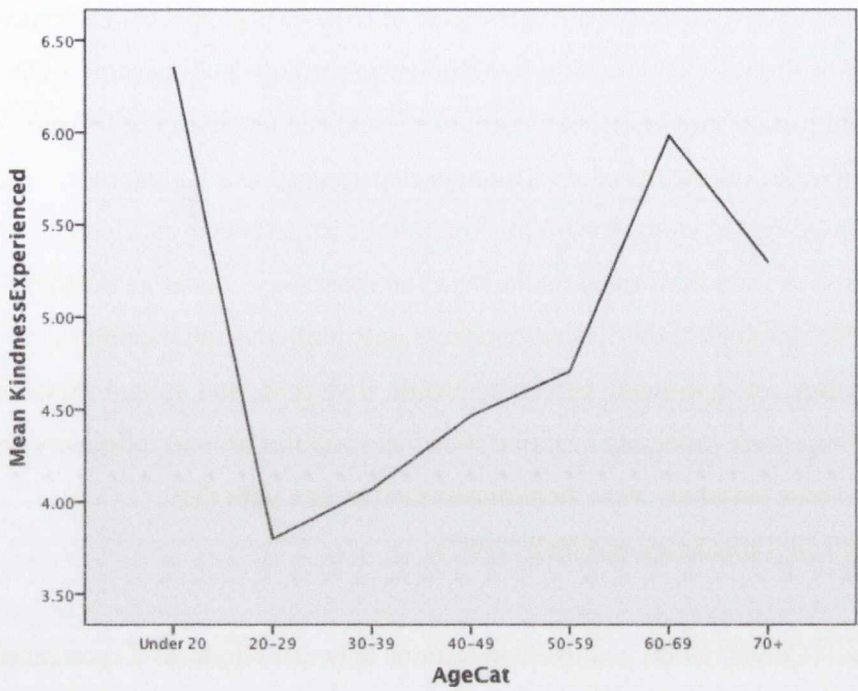


Figure 12- Relationship between Kindness Experienced and Age Category

Mann- Whitney U –tests were run to investigate the differences in Kindness Potential and Kindness Experienced by gender. There was a significant difference based on gender ($Z = -5.69$, $n = 2274$, $p < .001$), where females were significantly more likely to have experienced kindness than males. There were no significant differences with regard to gender within Kindness Potential.

Kruskal- Wallis H tests were run to investigate the difference between three groups of parent/grandparent status where one group was neither, one group was either and one group was both. The group who was neither a parent nor a grandparent was significantly less likely to have experienced kindness ($\chi^2(2) = 18.72$, $p < .001$) but there was no significant difference between the three groups in kindness potential.

Testing the Hypotheses – Step 2 – Bivariate (Spearman) correlations for kindness experienced, kindness potential and other key variables

The relationship between mood variables (changes in happiness and satisfaction from the previous week to the week when the kindness variables collected) dispositional variables (average happiness, average satisfaction, self-optimism, perceived health

and religiosity), collective identity variables (pride in Irish identity, pride in European identity, optimism about Ireland's future and a belief in a unique and valuable Irish identity), societal justice variables (extent of fairness and accountability in Ireland) and kindness variables (as measured by Kindness Experienced and Kindness Potential) was investigated using Spearman rank order correlation co-efficient. Preliminary analyses were performed on the data and there were moderate positive skews on variables kindness experienced, kindness potential, average happiness, average satisfaction, self-optimism, perceived health, Irish pride and unique valuable Irish identity. There were moderate negative skews in variables around religiosity and accountability. These variables were then transformed in line with the recommendations of Tabachnick & Fidell (2007).

There were small (Cohen, 1988) positive correlations between Kindness Experienced and Kindness Potential ($r = .19$, $n = 1796$, $p < .001$) and there were small (Cohen, 1988) positive correlations between changes in happiness and satisfaction versus the previous week and Kindness Experienced and Kindness Potential. There was also a small positive correlation between the change in happiness the following week and Kindness Experienced but not with the change in satisfaction the following week. (See Table 10).

There were small positive correlations between average happiness, average satisfaction, self-optimism, perceived health, European pride, a belief in a unique valuable Irish identity, optimism about Ireland, extent of societal accountability and kindness experienced. There was a small negative correlation between religiosity and kindness experienced. (See Table 10).

There were medium (Cohen, 1988) positive correlations between average happiness, average satisfaction, self-optimism perceived health and kindness potential and small (Cohen, 1988) positive correlations between Irish pride, European pride, belief in a unique valuable Irish identity, optimism about Irish future, extent of societal fairness and kindness potential. There was a small negative correlation between religiosity and kindness potential. (See Table 10).

Table 10 -- Kindness experienced (numbers) and kindness potential (on a ten-point Likert Scale relationships with key variables) – Bivariate correlations (Spearman).

Statements (n= 1796)	Kindness Experienced (W5) (number of deeds)	Kindness Potential (W6) (ten-point Likert –scale)
<u>Kindness Variables</u>		
Kindness Experienced (W5)	-	.19***
Kindness Potential (W6)	.19***	-
<u>Mood Difference Variables</u>		
Week 5 vs. week 4 happiness	.09***	-
Week 5 vs. week 4 satisfaction	.10***	-
Week 6 vs. week 5 happiness	.06**	-.10***
Week 6 vs. week 5 happiness	-.04	.11 ***
<u>Trait Variables</u>		
Average Happiness	.20***	.31***
Average Life Satisfaction	.22***	.30***
Self-optimism (W6)	.20***	.35***
Perceived Health (W6)	.10***	.31**
Religiosity (W3)	-.14***	-.05*
<u>Collective Identity Beliefs</u>		
Irish pride (W3)	.04	.14***
European pride (W3)	.05*	.13***
Unique valuable identity (W2)	.05*	.18***
Optimism about Ireland (W6)	.12***	.26***
<u>Societal Justice Beliefs</u>		
Fairness (W2)	.03	.07**
Accountability (W2)	.07**	-.02

Note: **p* < .05, ***p* < .01, ****p* < .001

Testing the Hypotheses – Step 3 – Regression models for kindness experienced and kindness potential

Exploratory multiple regressions were performed on kindness variables and other key variables to explore relationships between multiple levels of variables and kindness variables. There was high collinearity between average happiness and average satisfaction so a composite variable called average subjective well-being was created and included. As a result of the non-normal relationship with age category and kindness variables, both age and age-squared were included in the models.

Kindness experienced

The regression model was statistically significant, $F(16, 1796) = 5.88$, $p < .001$, and accounted for 4.2% (adjusted R^2) of the variance in kindness experienced. Age squared, average subjective well-being and religiosity made significant independent contributions to the model (See Table 11).

Kindness potential

The regression model was statistically significant, $F(17, 1796) = 24.25$, $p < .001$, and accounted for 18% (adjusted R^2) of the variance in kindness received. Kindness experienced, the change in satisfaction versus the previous week, average subjective well being, self-optimism, optimism about Ireland and societal extent of fairness all made significant independent contribution to the model (See Table 11).

Table 11 - Regression models on kindness experienced (give and/or receive a quantity of kind deeds) and kindness potential (likelihood to give and/or ask for help on a ten-point Likert scale)

	Kindness Experienced (W5)			Kindness Potential (W6)		
Total Adjusted R2 (SE)	.04	(5.86)		.18	(3.56)	
	B	(SE)	β	B	(SE)	β
<u>Kindness Variables</u>						
Kindness Experienced (W5)	-	-	-	.05	(.01)	.08**
<u>Demographic Variables</u>						
Gender	.68	(.33)	.05	.16	(.20)	.02
Parent/grandparent status	.22	.26	.03	-.20	(.16)	-.04
Age	-.13	(.05)	-.32	.06	(.03)	.22
Age squared	.00	(.00)	.34*	-.00	(.00)	-.21
<u>Mood Difference Variables</u>						
Week 5 vs. week 4 happiness	.06	(.08)	.02	-	-	-
Week 5 vs. week 4 satisfaction	.11	(.11)	.03	-	-	-
Week 6 versus Week 5 happiness	-	-	-	-.13	(.05)	-.07
Week 6 versus Week 5 satisfaction--	-	-	-	.22	(.07)	.08**
<u>Trait Variables</u>						
Average Subjective Well Being^	.27	(.07)	.13***	.17	(.04)	.13***
Self-optimism (W6)	.15	(.10)	.05	.38	(.06)	.20***
Perceived Health (W6)	-.03	(.09)	.01	.07	(.05)	.03
Religiosity (W3)	.16	(.05)	.07*	.02	(.03)	.01
<u>Collective Identity Beliefs</u>						
Irish pride (W3)	-.10	(.07)	-.04	.04	(.04)	.02
European pride (W3)	.03	(.06)	.12	.03	(.04)	.02
Unique valuable identity (W2)	.04	(.07)	.02	.12	(.04)	.07
Optimism about Ireland (W6)	.01	(.09)	.01	.19	(.05)	.10***
<u>Societal Justice Beliefs</u>						
Fairness (W2)	-.01	(.07)	-.04	-.13	(.04)	-.08**
Accountability (W2)	.03	(.07)	.01	-.11	(.04)	-.06

Note: **p* < .05, ***p* < .01, *** *p* < .001

Testing the hypotheses – Step 4 – exploring the effects of sharing feedback on the participation levels in the experiment.

As outlined separately by Hevey, Hand and MacLachlan (2015), the group that randomly received feedback each week was significantly more likely to stay engaged with the voluntary pro-social initiative – The National Happiness Experiment (NHE). The relationship between frequency of receiving feedback and continued participation in the NHE is outlined in Table 12.

Table 12 -- Effect of randomized feedback on continued participation rates in the National Happiness Experiment

Continued Participation Rates in National Happiness Experiment (n=3309)		
	No Feedback	Ever Feedback
	%	%
Week 3 continued participation	80	95**
Week 4 continued participation	78	95**
Week 5 continued participation	75	93**
Week 6 continued participation	72	94**

Note: * $p < .05$, ** $p < .01$.

Over the course of the study, there was a significantly higher level of drop-out in the group that never received feedback (64% dropped out), than in the group that received feedback (17% dropped out), $\chi^2 (1, N = 3, 093) = 486.91, p < .001$. The relationship between receiving feedback and dropping out of the NHE is outlined in Table 8 below. There was a significant linear association between levels of feedback and drop-out levels, $\chi^2 (4, N = 3,093) = 466.45, p < .001$

Table 13 –Effect of randomized feedback of weekly results on the cumulative drop -out rates in the National Happiness Experiment (NHE).

	Feedback		Total
	Never got feedback	Got feedback	
Remain in study	209	2104	2313
Drop out	503	493	996
Total	712	2597	3309

A chi-square test of independence was performed to examine the relation between ever getting feedback and drop-out levels. The relation between these variables was significant, $\chi^2 (1, N = 3309) = 524.17, p < .001$. People who got feedback at any stage in the experiment were almost three times more likely to stay engaged with the pro-social initiative – The National Happiness Experiment (See Figure 2).

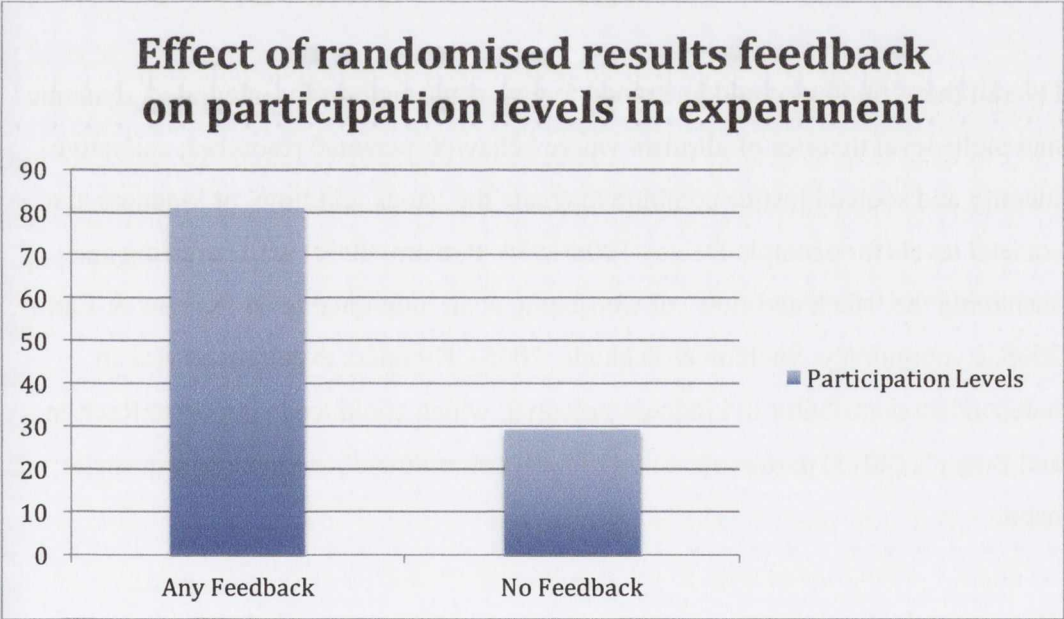


Figure 2 - Relationship between randomized results feedback on participation levels in the National Happiness Experiment.

4. Discussion

This research found that kindness experienced was positively related to kindness potential. It found correlations at multiple levels between dispositional variables, collective identity variables and societal justice variables. Exploratory multiple regression analysis explained a small (4.2%) percentage of the variance of kindness experienced with average subjective well being and lack of religiosity making independent contributions. Exploratory multiple regression analysis explained a larger (18%) percentage of kindness potential with independent contributions to the model from kindness experienced, change in satisfaction versus the previous week, average subjective well-being, self optimism, optimism about Ireland and the perceived level of fairness in society. In addition, the experiment found that relational framing, as operationalized by giving a random third of participants feedback on the previous week's results, was related to higher levels of continued participation each week and that the cumulative effect of giving feedback versus no feedback was related to almost three times the level of voluntary engagement as seen in on-going participation.

Overall these findings could be argued to give some support for integrated, dynamic and multi-level theories of altruism where behavior, personal resources, collective identity and societal justice combine to create the 'stock and flow' of kindness at a societal level (for example Dewey 1908/1934; Putnam, 2000) while creating and sustaining the 'stock and flow' of well-being at an individual level (Konow & Earley, 2008; Lyubomirsky, Sheldon & Schkade, 2005). Kindness experienced was an independent contributor to kindness potential, which could lend support to Rachlin and Locey's (2011) part-explanation of 'soft commitment' to kindness as a social habit.

This research found that average subjective well being was related to the levels of kindness experienced and kindness intended but that weekly changes in subjective well being were only related to kindness intended, not kindness experienced. On first glance, it may appear that these findings part-contradict Fredrickson's (2001) 'broaden and build' theory of positive psychology where broader ranges of thought-action build from and towards increases in subjective well being. However on a deeper level, it is possible that these findings could support Konow and Earley's

(2008) finding there can be short-term costs to generosity in terms of shorter-term subjective wellbeing but longer term benefits in terms of longer term psychological well being. This may still support the overall 'broaden and build' approach on a long-term basis, with an allowance for short-term mood-based happiness costs to build longer- term meaning-based happiness. Similar arguments for temporal difference between happiness and meaningfulness have recently been advanced by Baumeister, Vohs, Aaker & Garbinsky (2013).

The positive independent contribution of 'self optimism' to kindness potential could lend support to Fredrickson's (2001) 'broaden and build' hypothesis where positive personal resources like optimism broaden the thought/action repertoire including others, which leads to increased opportunities and experiences of kindness. The positive independent contribution of 'optimism about Ireland' to kindness potential is interesting in the context of the role of positive collective identity in supporting altruism in a given national context. The absence of fairness also makes a positive independent contribution to kindness potential, in line with other findings on the relationship of fairness with altruism (for example Tan & Bolle, 2006).

The negative correlation of religiosity with kindness experienced and kindness intended is interesting in the light of many studies that have found positive links between aspects of religiosity and pro-social behavior (for example Ruiter & De Graff, 2006). Saroglou (2013) has argued that pro-sociality needs to be considered as only one aspect of religious motivation which may be in conflict with other practices like church attendance or other values like 'conscientiousness'. Norenzayan and Shariff (2008) examined the evidence and found that religion was related to prosocial behaviour in contexts where reputation was at stake. It is possible that reputation was not a motivation in the context of this large scale anonymous study. It is also possible that the recent religious scandals around paedophilia and betrayal of trust within the Catholic Church in Ireland (Moore, 1995; O'Toole, 2010) have undermined the historical association of religion with kind behaviour towards others. This might have led to both a mass-rejection of religiosity as a personal morality badge in Ireland and/or the emergence of correspondingly fundamentalist religious stalwarts.

It is worth considering the relative weakness of the regression models for kindness experienced versus kindness potential. Accepting that kindness experienced might also have been predicted from earlier kindness experienced (which was not measured), it is still interesting that only average subjective well-being had a positive independent contribution to kindness experienced and religion had a negative independent contribution with kindness experienced while self-optimism, optimism about Ireland and a sense of societal (un) fairness also made independent contributions to kindness potential along with average subjective well being. Experts in altruism (Batson, 1976, 1991; Rachlin & Locey, 2011) accept that there are complex factors, which can explain the deficit between 'good intentions' and 'good deeds'. Following Lewin (1951) and Heider (1958), Batson, Ahmad and Tsang (2002) argue that behavior can sometimes be an 'unintended consequence' of a different motivation and/or behaviour can be thwarted by competing motivations. Accordingly they argue that social psychologists should focus on optimizing people's altruistic motivations with an end-goal of increasing altruistic behaviours.

Importantly, in terms of the relational framing experiment, people who got feedback at any stage in the experiment were almost three times more likely to stay engaged with the voluntary pro-social initiative – the National Happiness Experiment. This could be interpreted in light of the findings on work motivation by Ariely, Kamenica & Prelec (2009) where 'minimal acknowledgement' of work was seen to increase intrinsic motivation. Previous research (Tetlock & McGraw, 2005; Agarwal, 2004) has also found that people have different behaviour expectations and judgments of relationships and behaviour, depending on whether the relationship is governed by market exchange or pro-social exchange. It is possible that sharing the collective results of the previous week was additionally motivating and meaningful in the voluntary pro-social context of the experiment.

At a societal level, Kang and Glassman (2010) have argued that moral thought and moral action, while connected, can exist separately and serve different social purposes. They propose that moral thought acts as a badge for 'belonging' to certain groups or society, effectively performing the function of 'cultural capital' (Bourdieu, 2001) whereas moral action is part of the social relations between people and performs the function of creating social capital (Fukuyama, 1995), which in turn

creates a bedrock of trust to facilitate societal interactions. Psychologists Bandura (2001), Dewey (1934) and James (1907), along with Aristotle, have argued that it is important that moral thoughts are linked, experimentally and experientially, to moral actions, as part of what Dewey called 'vital experience' (1934) - otherwise our individual and collective moral development and potential is limited.

Limitations

The self-selecting nature of the experiment might raise concerns that the sample are over-invested in sustaining subjective and collective well being which could limit the ecological validity of the study. It is true that the strongest happiness intervention results (Fordyce, 1977; Seligman, Steen, Park & Peterson, 2005) have been reported in studies where the participants were fully aware of the objectives of the studies. However Lyubomirsky, Dieckerhoof, Boehm and Sheldon (2011), have argued that in the real world, good deeds and self-improvement are frequently preceded by 'good intentions' and their eight-month long happiness intervention on expressing optimism and gratitude yielded stronger outcomes when participants were aware of the study objective and invested effort behind the activity. In light of these findings, the transparent objectives of the National Happiness Experiment could be seen to replicate the real-world motivations of many people to sustain and improve their personal and collective well-being. There is however the possibility that those who signed up for the experiment differ in some other characteristic (for example 'openness to experience' or 'capacity for self-reflection') so it would be interesting to conduct more research to explore this issue.

In addition, the self-reporting dimension of all the independent and dependent variables in this study raise the possibility of social desirability and response biases (Edwards, 1957; Crowne & Marlowe, 1964). In the case of kindness experienced and kindness potential, there is a risk that these reports could carry an element of 'positive illusion' for the giver and at worst are judged as undermining or received as harmful for the receiver. However there is evidence (Rushton, Chrisjohn & Fekken, 1981) that self-report altruism has predicted peer-ratings of altruism, organ-donor cards and other pro-social orientations. In an organizational context, Grant and Mayer (2009) recently used multisource data from two different field samples and found positive

interactions between both pro-social and impression management motives for affiliative citizenship behaviours. They argued that helpful deeds could arise from people who are both 'good soldiers' and 'good actors'.

In the case of dispositional, collective identity and societal justice beliefs, it could be argued, following Lyubomirsky, Dickerhoof, Boehm and Sheldon (2009) that these variables are by definition subjective constructs so self-reports are the gold standards. Galen (2012) has critiqued naturalistic studies for potentially over-stating the connection between religiosity and kind deeds because there is a lack of contextual data on the target of kindness in terms of in-group versus out-group membership. However in this case there were negative correlations between self-reported religiosity and both kindness experienced and kindness intended and non-religiosity made a significant independent contribution to the kindness experienced regression model. It would be interesting to conduct more research to better understand this relationship.

Implications for Theory

This research lends some support to the broaden- and- build paradigm around altruism and wellbeing proposed by positive psychologists (Erikson, 1982; Lyubomirsky, Sheldon & Schkade, 2005). It also provides partial support for two of the three alternative explanations proposed by Rachlin and Locey (2008), with some evidence of kindness as a habit built through 'soft commitment' and some evidence of a relationship between kindness potential and optimism about 'future self' (Parfitt, 1984). There is directional support for a multi-level framework (for example Sheldon, Cheng & Hilbert 2011), which includes collective identity beliefs and societal justice beliefs as well as individual traits. De Waal (2008) has argued that it is important that we put the altruism back into altruism – the long-term motivation of humans to build relationships and an overall context for current and future relationships. Nussbaum (2001) and Batson (2011) have both argued that ultimately the antecedents of altruism lie in what individuals 'value' but as Ariely, Loewenstein and Prelec (2006) have shown, even in consumer goods 'value' is subjective, relative and contextual. In the case of altruistic behaviour where the 'value' to the giver and the receiver can be

positive, neutral or even negative on a combination of real and symbolic dimensions, it is likely that the role of meaning and purpose as integrating constructs (McKnight & Kashdan, 2009) will help support any short-term personal cost for long-term personal and collective cultural benefit.

Theoretically it might move the understanding of altruism and kindness forward by incorporating meaningfulness into the 'broaden and build' framework and its implications for altruism. Exploratory analysis from Baumeister, Vohs, Aaker & Garbinsky (2013) found that activities that promoted a focus on others versus self (for example listening to others, buying gifts for others) and activities focused on reflection (meditation) were negatively correlated with happiness but positively correlated with meaningfulness. The difference between happiness and meaningfulness, as operationalized by psychological wellbeing (Ryff, 1989) versus subjective wellbeing, was also found by Konow and Earley (2008) to predict generosity in dictator games. It could be interesting to explore how happiness and meaningfulness interact with Batson's (2011) four pro-social motivations – egoism, altruism, collectivism and principlism- which he proposes can compete, conflict and change. The introduction of meaningfulness into this framework could also help tease apart religiosity and spirituality and how they interact with altruism (Saroglou, 2013). Van Cappellan et al. (2013) found evidence that inducing self-transcendent positive moods increased participants' spirituality, moderated by two basic world assumptions around meaningfulness and the benevolence of others. They advance the argument that spirituality is an upward spiraling pathway to and from positive self-transcendent positive emotions.

Theoretically it is also important to include dimensions of 'reflection' before and after possible acts of 'kindness' to ensure maximization of collective well being in the long term. Altruism may have habitual dimensions but to maximize human welfare it cannot merely be a straightforward unthinking habit. Schneider (2001) has argued that optimism is a construct that can be complicated by 'fuzzy meaning' (where individuals have different definitions of a behaviour) and 'fuzzy knowledge' (where individuals have different access to behavioural information). It will be important to separate out the meaning and knowledge of givers and receivers in this light and possibly explore the potential role of reality checks in aligning meaning and

knowledge. As Dewey (1908/1932) has stressed in his Theory of Moral Life, the real debate within altruism is whether there is a continuous balancing of feelings of compassion with internal reflection (or moral deliberation). In a parallel process, what Dewey (1908/1932) called a dramatic mental pattern of 'reflective morality' at an individual level, may need to be reflected in some capacity for 'triple loop learning' (Argyris, 1982; Bateson, 1972) within the system, at a societal level.

Future Research

There is a need for more longitudinal, multi-level research in naturalistic contexts exploring different types of pro-social and helpful behavior, the dynamics between them and the social network effects that they create, and to investigate in what conditions total well being and meaningfulness could be optimized. Specifically, there is a need for more research to further investigate the role of 'social discounting' (Rachlin & Locey 2011) and how the 'broaden and build' multi-level framework might work in terms of 'strong ties' and 'weak ties' (Granovetter, 1973) and 'bonding' and 'bridging' social capital (Putnam, 2000). Following De Figueiredo & Elkins (2003) investigations into the two factor-structure of 'national pride', it would also be important to separate out the contributions of patriotism and nationalism to collective kindness capital. In addition Furnham's (1986) proposal around the two-factor structure of just world beliefs, highlights the importance in identifying the specific contributions of just world beliefs and unjust world beliefs to societal altruism.

It is also important to explore the potential 'dark sides' of excessive giving (Post, 2005) and excessive receiving of help (Dewey, 1908/1935) in terms of burnout for 'excessive' helpers and learned helplessness for 'excessive' receivers. Organisational studies (Bolino & Turnley, 2005; Bolino, Turnley, Gilstrap & Suazo, 2010) have found that both citizenship behaviours and pressure to engage in citizen behaviours can be related to job stress. Following Munyon, Hochwarter, Perrewé and Ferris (2010), it will be important to investigate pessimism and optimism as separate constructs in relation to pro-social behaviour as well as exploring the contribution of self-efficacy and collective-efficacy in the pro-social domain (Bandura, 1995; 2000).

It would be important to build in some objective measures or peer validation of kindness in future studies and to look at the role of self-reinforcement and peer feedback, especially as it is always possible that a 'kind act' can be misguided from the giver or misdirected to the receiver. At a group level it is also important to look at the 'dark side' of social capital (Putnam, 2000) when it bonds the in-group and ostracizes the out-group (Tajfel & Turner, 1986) and the critical role of social learning theory (Bandura, 1971) in 'modeling' a healthy balance within helpful dynamics for everyone.

It will be important to further investigate the role of relational framing in terms of both collective motivation and shared purpose for pro-social initiatives and organisations. Following on from Dewey's (1916) arguments about participatory democracy, the most critical aspect of finding a solution to any social problem is having the members of the community work together in the experimental process. Becchetti, Bruni and Zamagni (2015) have recently examined the role of relational goods in creating collective well being and argue that it is critical to adopt a participative/deliberative model of democracy if we want to tackle the decline in the social and moral legitimacy of the current global model of development. To paraphrase Jane Jacobs' wise words about cities, 'Communities have the capability of providing something for everybody, only because and only when, they are created by everybody'.

Implications for Policy and Practice

From a policy perspective, altruism can be viewed as a public good. Fishbacher and Gächter (2010) found in dictator games that people's cooperation was conditional and linked to expectations of what others would contribute. Accepting the two caveats that, it is not always 'public' (Batson, 1994) and that it is not always 'good' for all parties (Post, 2005), the 'active orchestration' of altruism is still a relatively cost-efficient policy option to support and sustain collective well-being. In light of the growing body of evidence on the positive inter-connections between kindness experiences, individual well-being and social cohesion, it is important to consider interventions that could help 'nudge' kindness experienced and kindness potential within individuals (Thaler & Sunstein, 2008) and re-inforce shared collective identity

and ultimate societal goals (Lewin, 1951; Sachs, 2015; Sadedin & Duenez- Guzman, 2012).

There is an opportunity to actively cultivate what anthropologists (Smith, 1984; McCay, 2012) have called the ‘comedy of the commons’ – where comedy is defined as ‘the drama of humans as social rather than private beings, a drama of social actions having a frankly corrective purpose’ (p.12) - as a conscious policy alternative to the neo-liberal vision (Friedman, 1970) and deliberate promotion of self-serving behavior in public goods contexts, reinforcing the ‘tragedy of the commons’. In the case of Ireland in particular, the harnessing of relatively strong comparative performance in national happiness levels (Helliwell & Wang, 2012), with indications of leadership as a ‘good country’ as manifested in outward citizenship behaviours toward other countries (Anholt & Govers, 2014) could provide the potential environment to deliberately acknowledge and encourage kind deeds between citizens and within communities (MacLachlan & Hand, 2013).

Conclusion

There is strong evidence that the capacity for kindness is innate in human beings (Batson, 2011; de Waal, 2008). Nonetheless, as with all pro-social intentions (for example Kollmus & Ageyeman, 2002) it is far from inevitable that this capacity is manifested as behaviour. It is important for the health of individuals and for the health of society that we continue to explore ways to cultivate kindness and sustain an ‘upward spiral’ of altruism that works within and across society.

5. Acknowledgement

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Chapter 6 – Overall Research Findings, Limitations, Discussion and Future Research

This thesis explores the role of brands and branding in pro-social contexts and aims to make a theoretical contribution to a pro-social theory of brands and to more general theories of branding. Following the pragmatic method (James, 1907; Peirce, 1878; Dewey, 1920), this thesis uses mixed methods research to investigate the four research questions: (i) What is the function of brands and branding in pro-social contexts? (ii) How should brands and branding in pro-social organisations be understood and applied to *align* internal and external stakeholders? (iii) Do brands and branding in pro-social contexts differ *in kind* or *in degree* from brands and branding in general? and (iv) How can understanding the role of brands and branding in pro-social contexts contribute to general theories of brands and branding?

The three research studies explore pro-social brands as frames (Lakoff, 1974) for social engagement and uses mixed methods to investigate the research questions. The first research study investigates how NGO decision-makers construct brands and branding using the Interpretative Phenomenological Analysis (IPA, Smith, 1996) method, and identifies four master-themes of conflict around brands and branding within NGOs. The second research study investigates charity donor decision-making and explores the different contributions of surface framing (charity communications) and deep framing (the world-views of the donors), using a laboratory experiment between subjects. The third research study investigates the dynamics of good will (as operationalised by kindness experienced and kindness intended) at multiple levels, using a naturalistic SMS-based pro-social experiment over six weeks. In addition it experimentally investigates the influence of relational framing (as operationalised by providing feedback of the previous weeks average results randomly to a third of the participants each week) on engagement with the pro-social initiative over time.

Overall Research Findings

The first study – an IPA analysis of ten decision makers in an NGO – highlights four main barriers to brands and branding in NGO's. The first issue is cognitive complexity in balancing the sheer amount of actors and factors and appealing to emotional sympathy and/or rational deliberation within potential supporters. The second issue lies in balancing the identity and needs of the organization with the (sometimes conflicting) needs of donor and recipient stakeholders. The third issue is cultural and concerns the legitimacy of brands and branding within an NGO context. The fourth issue lies in the underlying legitimacy of NGO's in terms of efficacy and accountability. Taken together these findings point to serious differences and challenges for the role of brands and branding in pro-social versus for-profit contexts. At the most extreme interpretation, these findings raise the question whether there is any practical or moral role for brands and branding within pro-social contexts.

The second study – a laboratory experiment investigating the role of surface framing (charity communications) versus deep framing (donor world-views) in donor support of a mythical charity – highlights the importance of gestalt evaluations, authenticity and efficacy in securing support for pro-social causes. The experiment was designed to investigate differences in communication presentation but there was no difference in donor support. The only significant factor influencing donor support was whether people believed in the efficacy or feasibility of the cause in question. There was no difference in support on the basis of the desirability or 'hope' that the cause could be tackled. In addition, when compared to real world options, the donors chose a real charity brand in favour of the mythical charity. Taken together these findings point to the importance of reality and efficacy in building the support of donors for pro-social goals.

The third study – a naturalistic experiment investigating the multi-level dynamics of good will and the effect of providing feedback on engagement with the pro-social initiative – highlights the relationship of overall context to good deeds and the importance of transparency in building lasting engagement with pro-social initiatives. The study demonstrated that good will can be seen observed as dynamic process, where

kindness experienced is related to kindness intended. There was also evidence that individual traits (such as happiness, satisfaction and optimism), common identity beliefs (optimism about a collective future) and societal beliefs (such as levels of fairness) all made a significant contribution to kindness intended. Finally, the experiment found that providing feedback on the previous weeks results randomly to a third of the sample significantly increased levels of engagement with the pro-social initiative.

General Discussion

The following section discusses the research findings, potential implications for theory, research limitations and future research. Firstly it explores how the findings can be integrated with the theoretical opportunity for pro-social brands and what new areas might be important to include in the future development of pro-social branding theory. Secondly these findings can be integrated into the previous broader literature around altruistic motivation, organizational culture and stakeholder engagement in pro-social contexts. Thirdly these findings can be applied to the four research questions and provide some future direction for theory, practice and future research. A new theoretical framework for pro-social brands and branding is also proposed.

Integrating the Findings with the Theoretical Opportunity

Taken together these three studies shed light on a potential role for brands and branding within pro-social contexts and how this could help address the gap in existing brand theories. The first study specifically highlights the tensions that arise for the ten Oxfam decision makers due to lack of alignment between vision culture and identity. There is tension and lack of alignment between the internal Oxfam culture and the language and practices of branding, there are tensions and conflict between the images of external donors and the internal images within the Oxfam culture, there is a lack of alignment between the vision of Oxfam management and the images of expectations of donor governments and the donor publics. The second study finds some supporting evidence of the importance of aligning potential donor's

self efficacy for a just world with a given charity. The third study finds some important evidence aligning the behaviour of a pro-social initiative with the goals of the pro-social initiative, which can be seen as positive example of aligning culture, vision and identity.

However these three research studies also provide some indications for how existing brand theories might need to be developed to better fit within pro-social contexts. The first area concerns the difficulty of achieving authentic alignment in a pro-social context, in light of the chronological, psychological and geographical distance between the people who fund or lead these pro-social initiatives and the people who receive or participate in these initiatives. This has been discussed in other literatures as 'contract failure' (Hansmann, 1980) or as 'broken feedback loop' (B. Martens, 2005). This disjuncture highlights the potential for 'good intentions' to backfire within the overall nexus of psychological contracts (Rousseau, 1995). In pro-social contexts, it highlights the need to put some additional weight onto the experiences of recipients within the overall alignment process, in order to ensure that the stated pro-social goals are fundamental to the organizational brand.

The second area, following on from the first area, concerns the importance of being specific about the stakeholder culture (Jones, Felps & Bigley, 2007) that underpins the pro-social sector (for example altruism or moralism). The role of power imbalance seems to be particularly important in light of the potential disjuncture between stakeholders as mentioned above, and the importance of keeping the welfare of the recipient as the centre of gravity for the pro-social sector. It is also important to recognize that within the pro-social sector, other charities and NGO's are collaborators rather than competitors in the for-profit world. This may mean that the stakeholder culture needs to explicitly serve the greater good and represent what Conner and Markus (2013) have called an 'interdependent self' versus the 'independent self' which might sit more easily in the for-profit world.

The third area concerns the definition of 'vision' in the pro-social sector and how it is important that pro-social visions are seen as realistic or possible. Bonniface and Henley (2008) have demonstrated the importance of collective outcome efficacy in building stakeholder engagement for pro-social goals. Separately Hoggett (2006) has

warned about the danger of ‘vision’ as rhetoric, which seeks to mask or distort reality. Following Sartre (1956/1943) it is probable that much of the power of pro-social entities lies in their implicit ‘becoming’ but that the broken feedback loop can mean that the rhetoric of the future needs to be backed up by the actions of the present.

Integrating the Findings and the Broader Literature

The findings of these three studies can be integrated into the previous literature to build towards greater understanding of the barriers and potential role to brands and branding within the pro-social sector. The first study provides evidence for the value and values conflicts and trade offs within brands and NGOs, at decision-making, identity, cultural legitimacy and systems legitimacy levels. The second study demonstrates how deep value frames are related to decision –making, in particular the role of subjective-efficacy around the cause in question, is related to intended support from donors. The third study shows how helpful behaviour is related to helpful intentions, as well as individual values and cultural frames around efficacy and justice. It also provides an interesting finding around relational framing and social engagement when sharing the previous week’s results with a randomized third of the participants, increased commitment almost three-fold to the voluntary social experiment. This relational framing result potentially has an interesting bearing on the nature of ‘incentives’ in social purpose initiatives and contexts (Gneezy, Meier & Reil-Biel, 2011). It may also offer an interesting angle on ‘minimal motivation’, which Ariely, Kamenica and Prelec (2009) describe as minimal valuation and acknowledgement of a person’s contribution to the work in question, in the context of a voluntary national experiment with a stated purpose of exploring and improving common wellbeing (MacLachlan & Hand, 2013).

The findings and discussions of this thesis ultimately go to the heart of value theory and the different perspectives about how, why and to what degree people put value on things, people, relationships and ideas. In both descriptive and normative terms, both brands and pro-social initiative represent (i) value as a specific outcome of interactions and transactions and (ii) values as the context in which we understand,

frame and make sense of those interactions and transactions. The criticisms of both pro-social organisations and brands are fundamentally connected to individual author's evidence and arguments about whether the value and values that they represent are what this society needs and wants moving forward. In particular the specific debate about the role of brands within the pro-social sector is anchored in whether brands are a symbol of trust and effectiveness (which in broad terms would support the stakeholder agenda of pro-social initiatives) or whether brands are the instrument of what Markus and Conner (2013) have called the 'businessification' of non-profits, which conflicts with the expected value and values of many pro-social stakeholders.

As economic philosopher Sandel (2012) has warned, there are moral limits to markets and there is a meaningful and real difference between a market economy, in which markets are a useful way to promote efficiency, and a market society, in which markets are the self-proclaimed answer for every societal need and problem. This clear delineation between market economy and bigger-than-market society points towards three related and inter dependent ways in which value theory can contribute to the role of brands and branding in pro-social contexts: understanding *what* constitutes value in pro-social contexts, understanding *how* that value is cultivated and exchanged and understanding the *relative value* of the organisation's pro- social *purpose* versus the *organisational survival* per se.

Understanding what constitutes value in the pro-social sector requires understanding what Hoggett (2006) calls the 'dual-character' of social purpose organisations, where the value of the organization lies not only in the services it delivers but in the governance function it serves to uphold society's values. If social purpose organisations are reduced to valuations of their economic output, their societal value is being degraded (Sandel, 2012). Research into the motivations of wider charity stakeholders (MacMillan, Money, Money & Downing, 2005; Sargeant, Ford & West, 2006; Ranganathan & Henley, 2008) has continually found that the motivation to donate or fund charities is bound up with the 'cause' or social goal that the charity represents. This dual-character also places inherent value on the relationships with the recipients and partners of development NGOs, as expressed in Obrecht's (2011) idea of 'moral appraisal accountability':

‘Accountable relationships can be good for their own sake, regardless of what outcome or ends they produce. This is because accountability is an embodiment of respect between an NGO and the parties whom it affects, and this show of respect is expected of an NGO by those who agree to collaborate with it. Thus accountability is valuable for its own sake, as a constitutive element of the relationships that support an NGOs agency’ (Obrecht, 2011, p88).

This understanding of dual-character helps understand how value is cultivated and exchanged for the pro-social sector and its stakeholders. Value is holistic, dynamic and relational and manifested in four main ways – understanding, relation, action and evaluation. The schematic below (Figure 13) attempts to depict how this might work in practice. At a systems and stakeholder level, this approach acknowledges the importance in continually evaluating and realigning any gaps between what organizational psychologists Argyris and Schon, (1974) call *theory-espoused* versus *theory in use*. For pro-social organisations reflecting on and evaluating what is actually happening versus what we understand or say is happening is particularly important in light of the psychological, geographical and chronological separation between the different stakeholders across the ‘aid chain’. At a deeper level, each pro-social organisation can contribute to societal frames and values in which interconnected and interdependent groups can collaboratively tackle and take responsibility for common goals in a way that builds mutual value and respect. This circular process follows Dewey’s theory of valuation (1939) in which moral and social value is understood as a continuum of ends-means, cultivated through the constant iteration of action and reflection, relating and responding, valuation and evaluation, being and becoming.

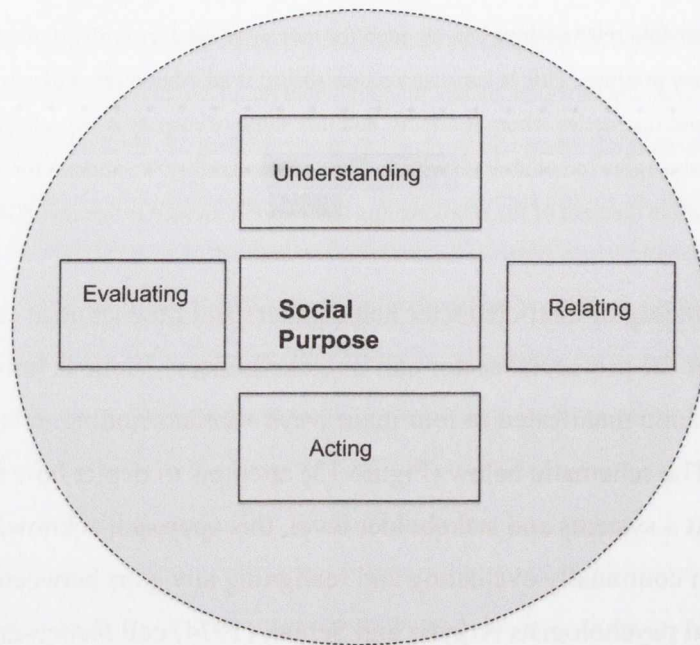


Figure 13: A framework for holistic value cultivation for the pro –social sector

Communication is an intrinsic part of each of the four ways in which the pro-social sector can cultivate value but it is not a substitute for them, not can it be split from them or deployed separately from them in an instrumental sense. Both the pro-social sector and the branding community are skilled rhetoricians but their stakeholders do not base their valuations and evaluations purely on rhetoric, especially if it reeks of platitude. As Furham & Gunter (1993) remind us, ‘communication not only involves the message, but it also involves mutual perceptions, feelings, attitudes & values’, (Furnham & Gunter, 1993, p.184). As value is holistic in social purpose contexts, so too communication must be holistic – it cannot be reduced to ‘brand visions’, ‘company missions’, slogans and mantras. Hoggett (2006) highlights this danger in the context of public service organisations when he writes:

‘A group or organization with a strong sense of purpose has an inner-confidence which is to be contrasted with the noisy declaration of those who, having lost all sense of purpose long ago, adopt the lapel-badge approach to values, those that bedeck themselves in Mission Statements,

Chartermarks, Investors in People awards and so on. In this way, values themselves become reduced to an element of strategy, something an organization uses to position itself in the marketplace '(Greer and Hoggett, 1999, in Hoggett, 2006, p. 190).

There is evidence (Chatman, Plzer, Barsade & Neal, 1998) that organisations which emphasise collectivism and independence better harness the creative power of diverse work groups than organisations, which emphasise individualism and independence. Bell (2007) conducted a large meta- analysis of organisations and found that the more than team members value collectivism, including harmony, solidarity and cooperation, the better than they perform. Gittell (2006) has called this organizational competence 'relational coordination' and proposes that it is based on collective identity, grounded in the recognition by each participant that his or her role is connected to and valued by other participants and this collective identity is facilitated through relationships of shared goals, shared knowledge and mutual respect.

Relationships are integral to coordination because they enable the formation of collective identity, which in turn facilitates coordinated collective action. This relational coordination (Gittell, 2006) theory also fits with social capital thinking on the importance of relationships as bedrock for democracy and theory of sense-making (Weick, 1993) where collective mind or shared understanding of work processes is necessary for effective communication. Although division of labour is good for efficiency and productivity (Smith, 1776), there is also a potential for alienation and fragmentation of human identity as a result of this division (Marx, 1845; Freud, 1927; Durkheim, 1933) and Piore (1992) has proposed that this separation itself limits the hermeneutic process of meaning making. As Gergen, (1999) has explained:

'If we hold the individual to be the fundamental atom of society, so do we emphasise co-ordination as opposed to community...As a result we give little attention to the co-ordinated efforts required for example to generate knowledge, reason and reality...We emphasise individual rights while paying little attention to the duties required to sustain this relationship. *Attention to individual units leads to blindness of relationship*' (Gergen, 1999, p.718, my italics)

Finally the understanding of the dual-character of pro-social organisations and how they can serve 'bigger than market' society can help understand the relative value of organizational purpose versus organizational survival within the social purpose sector.

Armstrong (1999) has made the crucial distinction between survival and development when applied to human service organisations. Within the public service organization, it is not organizational survival *per se* that matters, it is the survival of the organisation's public value that counts. This fundamental difference in value priority sheds critical light on the ultimate anatomy of branding within pro-social organisations, in which the organisation acts as a servant of the common goals as opposed to social purposes being activated to serve the organisation. As Hoggett (2006) has explained:

'For public organisations, the crucial question is not what it must do to survive, but what it must do to survive with value, that is as a place which can contribute to the development of the ethical and moral capacities of the communities that it serves. When an organisation's capacity for development is at risk, *what we mean is that its capacity to exist as a place with value is now in doubt (my italics)*. We speak, more perceptively than we know, of workers becoming demoralized -that is of losing a sense of value. These are the stakes that have been played for over the last two decades....' (Hoggett, 2006, p.189).

How the Research Findings inform the Specific Research Questions

1. What is the function of brands and branding in pro-social contexts?

The function of brands and branding in pro-social contexts is to help develop value and values for both the specific social purpose and social purposes in general. Following Kane's (2001) empirical work on the drivers of moral capital, brand can play an integrated role in connecting and relating cause, action, exemplar and symbolism/rhetoric and engaging stakeholders around common purpose and collective efficacy (Bandura, 1999). As Baldwin (1990) has noted, 'what fosters solidarity is a common experience of vulnerability, ...a sense of community is encouraged, most simply, in the face of universally shared risk', (1990, p.34). As Darnton and Kirk, (2011), and Murphy (2014), have pointed out, this goes beyond the intellectual, semantic exercise of 'finding frames', instead this challenges non-profits, voluntary organisations and NGOs to 'occupy frames' in a way that informs the actions of and holistic transactions between all stakeholders.

2. How should brands and branding in pro-social organisations be understood and applied to *align* internal and external stakeholders?

The role of branding in the pro-social sector in an integrated, holistic one, which provides 'text' or a simple understanding of social purpose which can align all stakeholders but also provides 'context' which can support the mutual exchanges between stakeholders. The brand works as a *gestalt* which is both 'experiential and experimental' (Perls, 1992, p.51.) which integrates understanding, relating, acting and evaluating in a means-end continuum (Dewey, 1939), in which NGO authority and NGO effectiveness are both derived and generated morally (Slim, 2002). The Tavistock consultants, Armstrong and Huffington (2004) have argued for an evolved understanding of organisations and leadership from 'containment' to '*pro-tainment*', which they define as the 'making present of an organizational idea, embodied in a lively and enlivening sense of the enterprise which the organization frames' (Armstrong & Huffington, 2004, p.7). In a humanitarian context, Currian (2014) has warned that organisations must serve pro-social purposes rather than vice versa - otherwise we run the risk of 'zombie humanitarianism' relying on outmoded organizational structures, rather than embracing the potential of 21st century network structures to facilitate global aid.

This integrated holistic view of brands and branding challenges pro-social organisations at an organizational behavioural level to internally live up to it's externally proclaimed brand values. For example Carr, McWha, MacLachlan and Furnham (2010) found evidence that the practice of 'dual-salaries', where NGOs pay expatriates significantly higher salaries than local staff to perform the same work, interacted with organizational policy, climate and culture to have a negative impact on work justice, motivation and retention. In an equally challenging way, this understanding of brands in pro-social initiatives questions the nature of recipient 'incentives' for participation in NGO programmes in development contexts. As MacLachlan and Carr (2005) have previously articulated (when discussing the 'Pay Me' phenomenon) there must be a profound disjuncture within the human dynamics of international aid and development, if the intended 'beneficiaries' of aid refuse to participate in 'development' programmes unless they are financially remunerated.

At a sectoral understanding and relational level, Edwards and Sen (2000) suggest that sustainable development in the 21st century requires an even deeper change in power relations with all stakeholders, in particular they recommend a shift from using power to advance specific self interests to using power to facilitate the self-development of all. Making decisions using what Weber called substantive rationality (where ethical, aesthetic and spiritual considerations are not split off from technical ones) versus instrumental rationality is undoubtedly both cognitively and morally complex but we can build 'habits' through practice and reflection (Aristotle, James, 1890). As moral philosopher Bernard Williams (1973; 1981) points out, the nature of human values is often incommensurable and there is often no 'right' thing to do, all we can do in each situation is 'act for the best' (Williams, 1973, p.173). In the pro-social context, there is a moral obligation for organisations and initiatives to seek feedback and learn from feedback. As Scott Harrison, founder of charity-water expresses it, 'being open to and actively seeking feedback is key, especially when it hurts. The people that [help you get better] are the ones [that] painfully expose your blind spots,' (Schwabel, 2013).

3. Do brands and branding in pro-social contexts differ *in kind* or *in degree* from brands and branding in general?

In simple terms this thesis could argue that pro-social brands are different *in kind*, insofar as they operate within a different stakeholder culture (which is more other-focused versus self-focused) than other sectors, and that failing to acknowledge that stakeholder culture difference can mean that 'brands' and 'branding' erode rather than cultivate the moral capital underpinning the altruistic sector. As Foo (2015) has demonstrated, pro-social motivation is also related to higher levels of personal sacrifice. However this thesis takes a deeper perspective and would argue that questions of morality are not confined to the pro-social sector, and moreover that the struggles for legitimacy in the business and government sectors (Edelman Trust Barometer, 2014) are also linked to declining trust and moral capital. Taking this perspective on board, this thesis asserts that brands and branding in pro-social contexts ultimately differs *in degree* from brands and branding in other contexts, as opposed to differing *in kind*. This applies Dewey's (1939) perspective, in which

moral experience is part of each person's overall 'vital experience' continuum, across the full spectrum of stakeholder cultures (Jones, Felps & Bigley, 2007)

This thesis proposes that the moral capital dimensions of value(s) need to work in concert with social capital, cultural capital and financial capital across all sectors. . In the absence of cultivating moral capital, there is a danger of what Padilla, Hogan and Kaiser (2007) have called a 'toxic triangle' within society, built on destructive leaders, susceptible followers and conducive environments. It asserts that effective leadership is needed in each of these sectors and does not support the instrumental view that the deficiencies of business and government can be resolved by 'borrowing morals' from the pro-social sector. In separate arguments Kane (2001) and Sison (2003) have cogently argued that the dearth of moral capital in politics and business can undermine the foundations of trust necessary for future effectiveness. As Sison (2003) points out in a business context:

'Bloated egos, insatiable ambitions, unwillingness to compromise, together with corporate craftiness (golden parachutes, poison pills, greenmail etc) could spell the doom of unions made in heaven from a long term strategic point of view. Bereft of 'moral capital' managers could prove to be corporations own 'suicide sac'. (Sison, 2003)

4. How can understanding the role of brands and branding in pro-social contexts contribute to general theories of brands and branding?

This thesis supports a holistic view of branding where understanding, action, relationships and evaluation are integrated and iterative across a means-end continuum (Dewey, 1939). It adds action, accountability and efficacy to the interactionist symbolic perspective of Hatch and Schultz (2009), the relationship perspective of Fournier (1998) and the dialectic understanding of Holt (2002). It deepens Jones (2005) perspective on brand- as- stakeholder- value and the priority he places on understanding what value exchanges are taking place between stakeholders in functional, emotional and symbolic terms. It integrates the contributions of stakeholder culture (Jones, Felps & Bigley, 2007) and stakeholder

legitimacy (Mitchell, Agle & Wood, 1997) with the important concept of moral capital (Kane, 2001; Sison, 2003).

This perspective integrates with wider organizational and social psychology perspectives around 'psychological contracts' (Rousseau, 1997) and the demotivating consequences of 'broken promises' (Boggs, Carr, Fletcher and Clarke, 2005). It helps 'make sense' (Weick, 1993) of previous research findings around altruistic motivations (Batson, (2011) stakeholder motivations in non-profits (MacMillan, Money, Money & Downing, 2005; Sargeant, Ford & West, 2006) and cultural observations about brands in the pro-social sector (Laidler-Kylander & Stenzel, 2013; Sargeant, 1999) It incorporates previous theoretical perspectives on the role of brands within charities and non-profits from Hankinson (2001), Stride (2003) and Kylander – Laidler and Stenzel (2013) and empirical findings around non-profit motivations and values (Sargeant, Ford, & Hudson , 2008; Aaker, Vohs & Moligner, 2010; Aaker, Fournier & Brasel, 2004; Liu and Aaker, 2008) . It unites theories of brand under broader theories of value and values while respecting the different centres of gravity across stakeholder cultures. This continuum of value and values from the for-profit to the pro-social sectors is shown again in Figure 14 below:

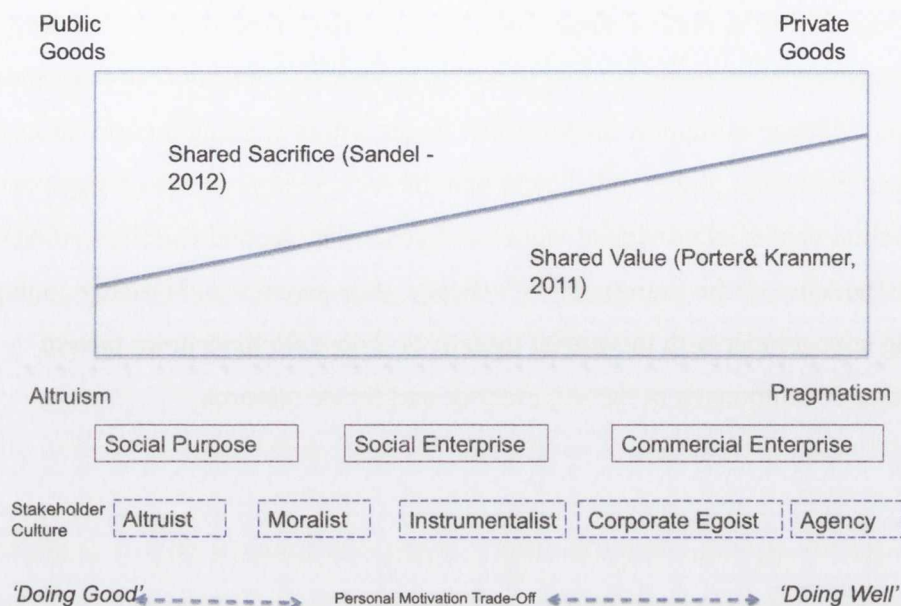


Figure 14 – A Potential Framework to understand the Continuum of Value and Values Across Sectors.

This type of framework may help explain the different frames in place across the spectrum from for-profit to pro-social contexts and the different value and values that are in place as we travel across the spectrum of stakeholder cultures (Jones, Felps & Bigley, 2005) – for example the 'shared value' of Porter & Kramer (2011) *market* exchanges (2011), as against the shared sacrifices of Sandel 's (2012) *communal* exchanges; the motivations and conflicts between commercial enterprise and pro-social enterprise and the individual and collective conflicts between 'doing well' and 'doing good' (Gardner, Csikszentmihalyi & Damon, 2001). It might also explain the importance for cultural fit in management practice across these sectors, rather than assuming that managerialism is 'value-neutral' and equally applicable in all sectors.

Overall Discussion and Conclusion

Taken together these findings from these three pieces of research confirm the gaps within existing brand theories to work within pro-social contexts. The first study provides evidence to support the three key issues within existing theories around alignment difficulty, power imbalances and the relative importance of organizational preservation versus its pro-social values and goals. The second and third studies provide evidence of the importance of efficacy, transparency and broader context in building engagement with pro-social initiatives. These findings point toward interesting developments in theory, practice and future research.

Theoretical Implications

These findings could lead to suggested modification of existing theories – for example Hatch and Schultz (2009) could be modified to incorporate dimensions of moral capital, which Kane (2001) has specified as cause, action, exemplar and symbolism. However, in light of the research studies' findings and wide analysis of the literature, this thesis proposes a new theoretical framework for brands and branding in pro-social contexts. This new theoretical framework is called Brand as Shared Sacrifice and it proposes a basis for pro-social brands and branding that can help align stakeholders to meet pro-social goals.

This proposed theoretical framework would have five key elements that would be necessary and sufficient to build brands as frames for engagement with pro-social goals. These five elements are moral agency, recipient wellbeing, collective efficacy, radical transparency and shared sacrifice. Together these five elements will deliver a brand based on common pro-social purpose, which is grounded in recipient well being and overcomes the challenges of stakeholder misalignment, power imbalances and organizational self-preservation.

Moral Agency is based on action and accountability around issues of right and wrong. Any moral agent has the ability to help or harm another. The authority and legitimacy of a pro-social brand lies in the promise of purposeful action. This is

why it is very important that action and accountability are interlinked in the pro-social space. If a brand is judged by its actions and accountability around a given moral goal, this can help overcome the difficulty of lack of alignment between the perceptions and realities of different stakeholder groups.

Recipient Well Being needs to be the ultimate measure of objectives and success for pro-social initiatives. This prevents power imbalance or distortion between stakeholders. It needs to be the basis of moral agency as outlined above. It also needs to be the metric guiding efficacy, as outlined below. This focus on recipient wellbeing can be seen in the development of the Millennium Development Goals (2000) and the Sustainable Development Goals (2015).

Collective Efficacy is based on the belief of all stakeholders that certain pro-social goals are attainable and feasible. This is a key corner stone behind engagement with pro-social initiatives. Efficacy in turn is created on the basis of moral agency and radical transparency around a given purpose.

Radical Transparency is based on respecting fellow stakeholders and clearly sharing progress and hindrances toward goals. Radical transparency is grounded in moral agency but also shared sacrifice because the consequences can sometimes lead to personal or organizational cost. Radical transparency requires courage in clearly outlining successes, failures and learnings for pro-social organisations and initiatives. Social psychologists (for example Ohtsubo & Watanabe, 2009) have demonstrated that human beings believe that sincere apology carries a personal cost for the apologist and these 'costly signals' can rebuild trust and relationships.

Shared Sacrifice is what fundamentally underlies the psychological contracts within pro-social contexts. This shared sacrifice differentiates pro-social initiatives from the shared value underpinning of for-profit alliances. This shared sacrifice needs to be exemplified by the organizations, management and employees. The sacrifices of donors and volunteers need to be acknowledged and valued rather than expected. Otherwise the pro-social brand is hollow and will erode rather than create trust in the pro-social sector.

In addition this theory reflects a systems perspective in acknowledging the interactions between these five elements and other contextual factors. At a systems and stakeholder level, this theory acknowledges the importance of continually evaluating and realigning any gaps between what organizational psychologists Argyris and Schon (1974) call *theory espoused* versus *theory in use*. It also supports Dewey’s theory of valuation (1939) in which moral and social value is understood as a continuum of means-ends; cultivated through the constant iteration of action and reflection, relating and responding, valuation and evaluation, being and becoming. MacLachlan, Carr and McAuliffe (2010) have also stressed the importance of continual learning in an aid and development systems context.

The proposed theoretical framework around Brand as Shared Sacrifice is depicted as a framework in the schematic below (See Figure 15):

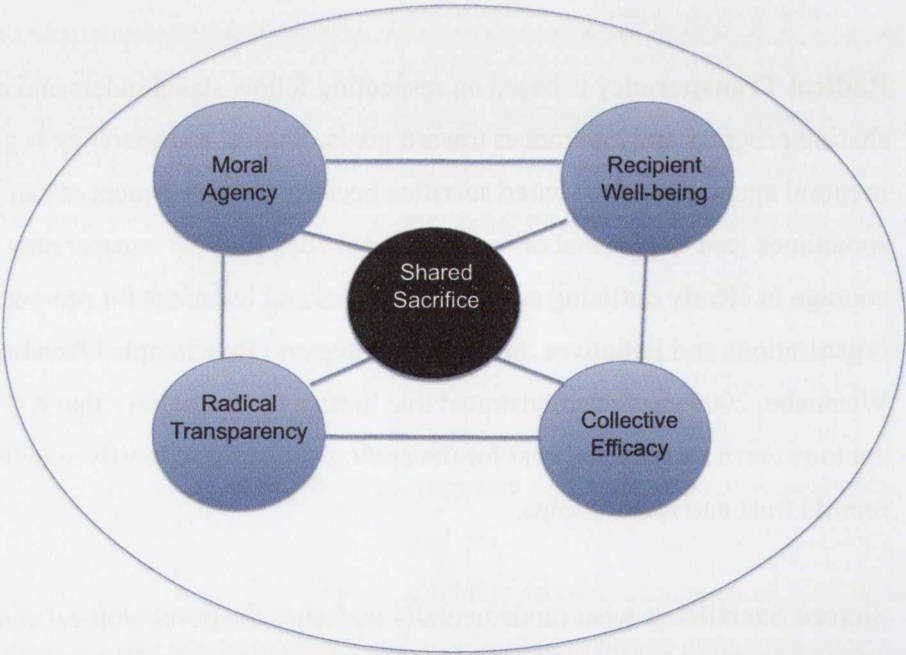


Figure 15 - Proposed Theoretical Framework to Align Stakeholders Behind Pro-Social Goals - Brand as Shared Sacrifice

The links between the new theoretical framework, the research findings from this thesis and previous empirical research is outlined in the table below (See Table 14):

Table 14 - How Proposed Theory fits with Research Findings in this Thesis and other Empirical Evidence

Proposed Theory: Brand as Shared Sacrifice	Support from Research in this Thesis	Other Empirical Support
Moral Agency	Study 1 – brand legitimacy	- Non-profits are ‘warm’ versus for-profits are competent - Aaker, Vohs & Moligner (2010)
	Study 2 – NGO legitimacy and accountability	- Charity brands differ by cause, not by personality - Seargent, Ford & Hudson (2008) -If sincere brands violate trust more long term damage to support –Aaker, Fournier & Brasel (2004)
Recipient Well Being	Study 1- need to align complex stakeholders around common goal	- Primary motivation for charity support is the cause or social need - Sargeant, Ford & West (2005)
	Study 1 – divided selves	- Primary motivations for funder support is the cause /social need- MacMillan, Money, Money & Downing (2005)
Collective Efficacy	Study 2 – role of Just World Efficacy in intended donor support	- Collective outcome efficacy affects environmental support -Bonniface & Henley (2008)
	Study 1 – NGO legitimacy and efficacy	- Justice efficacy linked to support of social policies

		Moyhidenni & Montada (1998)
Radical Transparency	Study 3 – effect of feedback provision on engagement	- Sincere apologies need costly signals- Ohtsubo & Watanabe (2009)
	Study 1 – NGO accountability	- Social Psychology of broken promises -Boggs, Carr, Fletcher & Clarke (2005)
Shared Sacrifice	Study 1 – NGO legitimacy	- Financial incentives ‘crowd out’ altruism- Gneezy & Rustichini (2000)
	Study 3 – role of fairness and collective identity in influencing intended kindness	- Perceived self-interest ‘crowds out’ perception of altruism - Newman & Cain (2014)
		- Unfair pay systems reduce employee motivation - Carr, McWha, MacLachlan & Furnham (2010)
		- Unfair pay systems reduce societal motivation - Hand & MacLachlan (2012)

Overall Strengths and Limitations

The overall strength of this overall research design lies in the broad scope of the methods and the use of non-student participants in all three cases. In addition, two of the three pieces of research were conducted in highly realistic contexts and the researcher’s own background as a social and business researcher and consultant was an advantage in terms of designing and conducting interviews within a real organisation. The pragmatic philosophy that guided this thesis is also a strength because each piece of research was designed and conducted in its own terms and the findings demanded continual comparison and synthesis with a broad range of psychological and other literature. The gaps across four brand theories allowed this thesis to investigate research questions at multiple levels of analysis.

The overall limitation of this overall research design lies in the lack of triangulation between perceptions, behaviours and outcomes within each of the three studies. Study One deals only with the perceptions of the decision makers and the interpretation of the researcher and does not compare that to real decision data and outcomes within the NGO. Study Two deals with perceptions and claimed behaviours of participants but the mythical nature of the charity makes it difficult to equate to real world decisions. Study Three deals with a limited amount of data due to the constraints of the method and the kind deeds data is claimed versus observed although the participant engagement and retention levels are real. In addition, there are specific limitations of each study detailed within the relevant chapters.

Future Research

Future research needs to develop this theoretical framework further and develop triangulated case studies that can connect the perceptions and realities of all stakeholders within pro-social contexts. Interesting research topics could include the Roman Catholic Church, the United Nation's Millennium and Sustainable Development Goals, Atlantic Philanthropies and the Gates Foundation. In particular, it would be interesting to explore the role of radical transparency when applied to apology in the pro-social sector and what constitutes a 'costly' signal in terms of action and accountability.

In the case of the proposed theoretical framework, it will be important to further explore whether all five aspects are necessary and sufficient to describe and predict the strength of a pro-social brand. It will also be important to explore the relationship and inter-dependence between these aspects especially in light of chronological, geographical and social distances between stakeholders.

The for-profit world would also be an interesting topic for research in light of corporate social responsibility, sustainability and shared value. The dark side of betrayal and lack of radical transparency in business and politics could also be worth exploring. This could help better compare and contrast the moral costs of brand

damage and sector damage along the continuum from the for-profit to the pro-social world.

Practical and Policy Implications

These research findings and proposed theoretical framework need to be shared with pro-social stakeholders, from organisations to governments, from public to philanthropists and from donors to recipients. There is a necessary debate around what pro-social brands are delivering and what needs to be done to restore trust and prevent harm. This may require costs, sacrifices and real innovation from all stakeholder groups.

Practically this thesis seeks to make some recommendations of how brands and branding can be integrated into the pro-social sector in a way that reflects and respects an altruistic stakeholder culture, which is anchored in the welfare and well being of recipients. There may also be implications for how pro-social organisations engage in partnerships with business and how partnership brands are understood, manifested and regulated (Laidler-Kylander & Stenzel, 2013). This is not just a function of public communications- as Murphy (2014) rightly says, understanding frames cannot be confined to a 'box-ticking' exercise analyzing the 'surface frames' of NGO communications content. Occupying frames goes to the heart of NGO behaviour and relationships with all of their stakeholders while challenging them to take responsibility for progress towards social goals. It also challenges the self-identity of pro-social organisations with respect to 'bigger-than-self' shared purpose. The narrative 'frame' of NGO action and being can no longer be about 'good NGOs taking on evil governments ...this is the story of humanity taking responsibility for its own future' (Schweitz, 1995)

On an organizational level, mergers and alliances should be actively pursued in order to meet pro-social goals. On a practical level the salaries of management should be transparent and demonstrate appropriate levels of personal sacrifice as well as value. The relationship with donors and volunteers should fit with the moral values proclaimed, rather than employing righteous bullying, hijacking or exploitation of one

group of people, in the appropriated name of another group. In line with the Accra Agenda for Action (2008), it remains crucial that common purposes and goals get higher priority than any agency's self-interest.

Pro-social organisations and initiatives do not operate in a vacuum and there are also implications for government and policy makers in how they construct and frame what Lakoff (2008) has called 'cognitive policy', the deep-seated assumptions, world-views and moral frames that colour and inform the development of subsequent material policies. As Hay (2007) has argued, political leaders have an important choice to make in strategies for public engagement, between 'preference accommodation' which appeals to lowest common-denominators or 'preference shaping' which seeks to engage in public dialogue on the values we want in the world. In a similar vein Putnam (1993) has maintained that there is a danger that the conception of democracy can be reduced to a 'residue of campaign strategy', rather than the collective deliberation of public interest.

Following a macro-psychology approach (MacLachlan, 2014), these findings demonstrate to policy makers the importance of understanding how broad contextual perceptions and incentives can influence individual pro-social behaviour. For example, unequal pay systems between local and international organizations (Carr, McWha, MacLachlan & Furnham, 2010) and unequal pay systems between public and private sectors (Hand & MacLachlan, 2012) have been shown to negatively affect individual levels of motivation.

There is a requirement for global governments to build and sustain efficacy around pro-social goals and ensure that actions, accountability, transparency and sacrifices are all applied to improving recipient wellbeing and empowerment. There is a need for legal and social consequences when individual people and organisations violate the trust of donor and recipient stakeholders. These crimes against trust have wider societal consequences for the perceived levels of shared optimism and fairness in society, which in turn affects our intended levels of altruism.

Finally understanding brands through a lens of shared sacrifice has implication for how business itself engages in more 'moral initiatives' like environmental

sustainability and corporate social responsibility (for example, Thomas & Lamm, 2012). The Edelman Trust Barometer (2014) highlights large (around 30%) deficits between the public 's expectations of the business sector and how they currently evaluate business in terms of both ethics and genuine engagement as measured by deficits in ratings (on a one to ten scale) of 'is ethical', 'listens to customers', 'cares about employees', puts customers before profits and 'acts responsibly in a crisis'. This gap between what Furnham (1992) calls 'importance' versus 'performance' (or what Agryis & Schon (1974) call 'theories espoused' versus 'theories -in-use') within the business sector, also highlights the risks of sector 'narcissism' and the instrumental use of 'pseudo-participation in communications networks' to the long term development of moral capital. In the financial sector in particular, Plender (2014) has warned that as long as incentives continue to be at odds with ethics, 'common decency will be a minority pursuit'. Or as Putnam (1993) expressed it succinctly in terms of civic engagement, 'shred enough of the social fabric and we all pay'.

In Conclusion

There is a crisis of trust in our world and this is compromising our ability to meet pro-social goals. Brands were originally conceived as signals of trust and they represent an interesting lens to explore pro-social engagement. Theoretical analysis of four brand theories has demonstrated three potential challenges for brands in pro-social contexts. The three challenges are lack of alignment between donor and recipient stakeholders, power imbalances between stakeholders and the relative importance of the pro-social organization itself versus the pro-social goal. These three challenges are all grounded in the fundamental differences in the stakeholder psychological contracts in pro-social versus for-profit contexts.

Three research studies identified the barriers to brands and branding and highlighted important positive aspects in pro-social contexts. The first study showed that cognitive complexity, identity conflicts, cultural legitimacy and system legitimacy were all potential barriers for brands and branding within NGO's. The second study demonstrated the importance of efficacy and authenticity in building support for pro-social brands. The third study identified the importance of kindness experienced,

individual traits, collective identity and societal fairness in intended kindness. It also showed the effect of sharing the previous week's results in sustaining engagement with a pro-social initiative.

This thesis proposes a new theoretical framework for brands and branding in pro-social contexts – Brand as Shared Sacrifice - that addresses the existing theoretical gaps and draws from the findings of the three research studies. This framework proposes that five elements are necessary and sufficient to build pro-social brands that will engage stakeholders with pro-social goals over time. These five elements are moral agency, recipient wellbeing, collective efficacy, radical transparency and most fundamentally shared sacrifice.

Future research can investigate these aspects using triangulated methods with pro-social organisations and initiatives. It will also be important to understand how 'costly signals' apply to apology and atonement in pro-social contexts. There is a need to engage in widespread debate of this research and discussions with all pro-social stakeholders. Business also has a role to play as one of the stakeholders in pro-social goals, but it is important that the difference between shared gain and shared sacrifice is properly understood in the context of private-public partnerships. There is also a need for global governments to build a case for collective efficacy around pro-social global challenges, including and in particular the Sustainable Development Goals (2015).

Linked Publications & Conference Presentations

Publications to date:

1. Hand K., & MacLachlan, M. (2012). An unequal balance? The effects of unequal pay systems on societal motivation in Ireland. *Special Edition of the Irish Journal of Psychology*, 33 (2-3), 129-136.
2. MacLachlan M., & Hand, K. (2013). *Happy Nation? Prospects for Psychological Prosperity in Ireland*. Liffey Press. Ireland.
3. Hand, K., Carr, S.C., & MacLachlan, M. (2016). Stepping up, by stepping out: Sustaining humanitarian work psychology. In Maynard, D., McWha, I., & O'Neill-Berry, M. *Contribution of Humanitarian Work Psychology to the Sustainable Development Goals*. Palgrave McMillan.
4. Hevey, D., Hand, K., & MacLachlan, M. (2015). Happiness in texting times: SMS as a method to track national levels of happiness. *Frontiers in Psychology*, 6, 1436.

Conference Presentations

1. The role of brands and branding in NGOs (2013). *A Trinity International Development Initiative (TIDI) seminar*, March 22nd, Trinity College Dublin.
2. The role of brands and branding in NGOs. (2014). Presentation at the *Irish Forum for Global Health Biennial Conference*, November 5th-6th, 2014.

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Appendix A – Discussion Guide for IPA Research with Brand Decision Makers in Oxfam

1. Introduction

- Who I am ? Why I am here ? The background to this research? Permission to record – confidentiality and anonymity, individual consent to be interviewed.

2. Decision Maker's Brief Background

- how have they ended up here? What were the other worlds they may have worked in – academia, business, government , media, civil service, other?

3. What is this organisation about?

- how do you describe it to outsiders ?
- how do you see it as insiders ?
- How have you adapted and changed recently?
- In response to which 'triggers'?

4. What makes this NGO different/special?

- from other NGOs in your area?
- From other NGOs ?
- From other organisations?

5. How does the NGO relate to different stakeholders?
 - head office
 - local offices
 - general population – donor countries
 - general population – recipient countries
 - state donors
 - large corporate donors
 - individual philanthropists
 - the media
 - specific suppliers
 - other NGOs
 - CSO's – local countries
6. Specifically how have you responded to the 'accountability' and 'participation' critiques ?
 - who is behind them and what are their motives ?
 - how well is your NGO dealing with them?
7. How does the NGO brand and the process of branding help or hinder your overall objectives or specific sub-goals?
 - does it 'sit' easily with your overall objectives?
 - Does it clash with any of your sub-goals?
 - Does it work against any of your stated objectives?
 - Where if any are the 'sticking points'?
8. How does the NGO brand and branding 'fit' with the other processes and activities of this NGO?
 - as language how does the term 'brand' resonate with different sections of the organisation?
 - How comfortable are people with the processes and consequences of branding?
 - What differentiates those who are more and less comfortable?

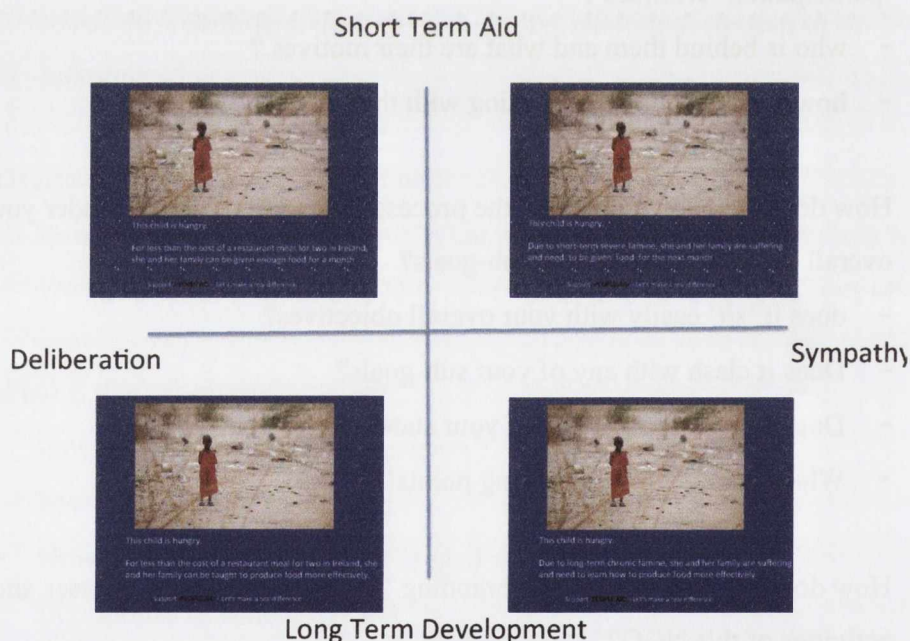
9. Any advice for me?

- who else should I speak to about this NGO?
- is there any seminal document or documentary that I must really read or see?
- who else should I speak to about NGOs in general?
- is there any NGO critic who you feel is extremely important?
- (how do you currently counter or respond to them?)

10. Any last thoughts from you on this subject or my approach?

Many thanks for your input and time. If you have any subsequent thoughts or ideas , please contact me on 0872243064 or khand@indigo.ie

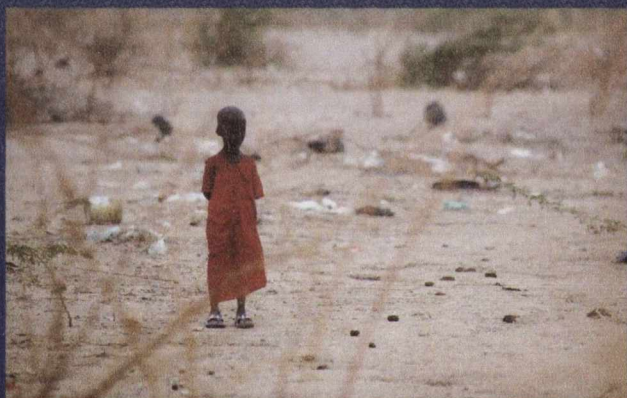
Appendix B- Set of Visual Stimulus for Lab-Experiment on Message Framing



Each participant only saw one piece of stimulus designed to experimentally test the effect of message framing in terms of content (Aid versus Development) and in terms of message processing (Sympathy versus Deliberation).

The four pieces of stimulus are shown in larger layout on the next two pages:

Stimulus 1 - Aid/Sympathy



This child is hungry.

Due to short-term severe famine, she and her family are suffering and need to be given food for the next month

Support **PEOPLE AID** – Let's make a real difference

Stimulus 2 - Aid/Deliberation



This child is hungry.

For less than the cost of a restaurant meal for two in Ireland, she and her family can be given enough food for a month

Support **PEOPLE AID** – Let's make a real difference

Stimulus 3 - Development/Sympathy



This child is hungry.

For less than the cost of a restaurant meal for two in Ireland, she and her family can be taught to produce food more effectively.

Support **PEOPLE AID** – Let's make a real difference

Stimulus 4. Development/Deliberation



This child is hungry.

Due to long-term chronic famine, she and her family are suffering and need to learn how to produce food more effectively

Support [PEOPLE'S VOICES](#) – Let's make a real difference

Appendix C – Full Set of Questions for Lab – Experiment on Message Framing

Demographic Details

This section requires limited personal details to assist in analysis of any population trends in the data collected.

1. What is your gender? (Please choose one option)

☐ Female

☐ Male

2. What is your age? (Please choose one option)

- Actual Age (years)....

3. What is your nationality?

- | | |
|----------------------------|-----------------------|
| Irish | ☐ |
| European (not Irish) | ☐ |
| African (not Irish) | ☐ |
| Asian (not Irish) | ☐ |
| North American (not Irish) | ☐ |
| South American (not Irish) | ☐ |
| Australasian (not Irish) | ☐ |

4. Do you have children (Please choose one option)

- ☐ Yes
- ☐ No

5. Would you describe yourself as religious? (1- 5 point scale)

☐ not at all ☐ somewhat ☐ neither religious nor non-religious ☐ somewhat non-religious ☐ very non-religious

6a. Do you work/volunteer for a charity?

Yes (continue)

No

6b. If you work/volunteer for a charity – is it/they (tick as many as relevant)

- Focused on Ireland
- Focused overseas
- Both

-

7. Within the past three months, have you given any money/goods to charities?

- Yes
- No

8. If you donated money /goods to a charity – was it /they (tick as many as relevant)

- In Ireland
- Overseas
- Both

Individual Dispositional Variables (scales administered randomly to participants)

Single –Item Happiness Scale (Abdel-Khalek, 2006)

Imagine how you feel in your life in general not just in your present mood. Please circle the number, which describes your general state of happiness where 0 is the minimum and 10 is the maximum score?

0 1 2 3 4 5 6 7 8 9 10

Brief Self Control Scale* (Tagney, Baumeister, Boone- 2004)

Not at all 1 2 3 4 5 Very Much

1.I am good at resisting temptation

2.I have a hard time breaking bad habits

- 3. *I am lazy*
- 4. *I say inappropriate things*
- 5. *I do certain things that are bad for me, if they are fun*
- 6. I refuse things that are bad for me**
- 7. *I wish I had more self-discipline*
- 8. People would say that I have iron self-discipline**
- 9. *Pleasure and fun sometimes keep me from getting work done*
- 10. *I have trouble concentrating*
- 11. I am able to work effectively toward long-term –goals**
- 12. *Sometimes I can't help myself from doing something even if I know it is wrong*
- 13. *I often act without thinking through all the alternatives*

**Italic items are reverse coded*

Hope/Efficacy for a Just World Scale (Mohiyeddini & Montada – 1996)

- 1. I can give more so that more people can get their fair share**
- 2. I would like to see a world which is generally a fairer place
- 3. I can do things to help make the world more just**
- 4. I'd like to see a world in which more people get what they deserve
- 5. I can do something to help victims of injustice get some compensation**
- 6. I hope that ultimately we will see justice come to pass
- 7. I can contribute to help tackle social and global problems**
- 8. I would like to see a world in which people would be compensated for unfair treatment
- 9. I can help reduce the injustice in the world**
- 10. I hope we can preserve ways of protecting justice in the future
- 11. I can help create a world where injustice will be rare**
- 12. I would like to see a world where injustice was rare
- 13. I try to influence other people to be fair to each other**
- 14. I would like to see a world in which the powerful people would try harder to make the world a fairer place
- 15. I actively support the desire to find fair solutions for social and global**

problems

16. I hope we will see less injustice in the future in the world

1,3,5,7,9,11,13,15 – Efficacy for Just World

2,4,6,8,10,12,14,16 – Hope for a Just World

Ideal Charity Semantic Differentials (random order of questions)

If you had to design your ideal charity and choose between the following characteristics of the charity on a scale from 0 to 5, how would you choose between the dimensions below:

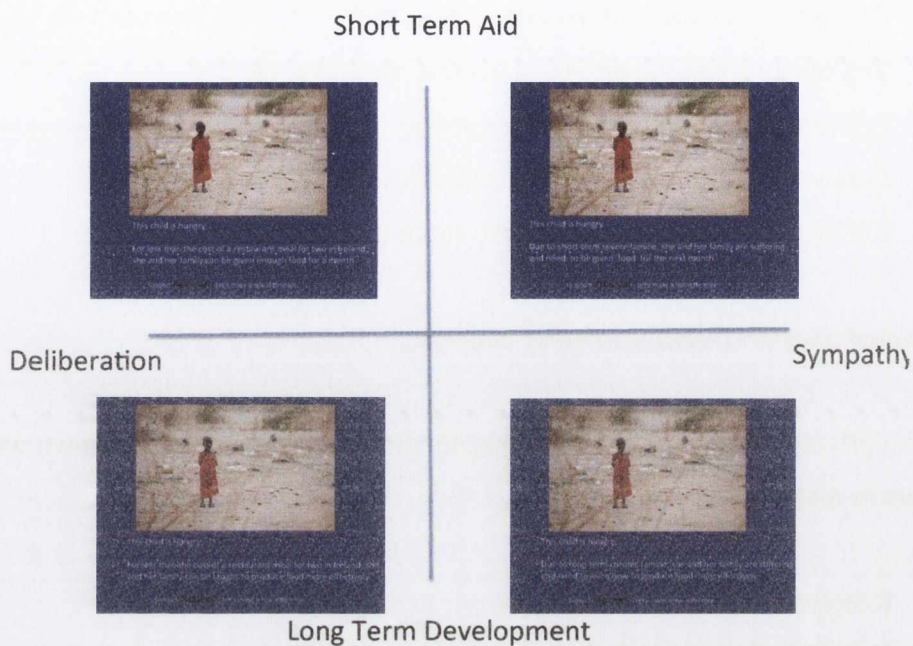
Ideal Charity on Key Dimensions (Random)

A charity that helps people in crises / emergencies (e.g Tsunami)	A charity that helps people on long –term development (e.g supports /funds education)
A charity that helps people in Ireland	A charity that helps the world’s poorest people
A charity that is passionate about what they do	A charity that is highly professional in how they work
A charity that everyone knows	A charity that I know well
An charity that was founded in Ireland	A charity that was founded in the country that is being helped
A charity that is emotionally connected to the issue they tackle	A charity that has expertise in the issue they tackle e.g engineers in water provision
A charity that has significant resource behind it e.g long –term funds	A charity that is running out of resources
A charity that is frugal in managing its administrative expenses	A charity that measures the impact of spending with the people it helps
A charity that has explicit religious links	A charity which has explicit secular (non-religious) links

Experiment Instructions

Following this page, you will see a piece of communication from an overseas charity
– People Aid.

Please look at it, read it and consider it as you would in your own life if you came
across it.



Dependent Variables

1. Claimed Support (5 point Scale, where 1 = highly unlikely and 5 = highly likely))

If a charity like People Aid communicated with this type of approach, how likely would you be to:

- Give a 5 euro donation now
- Give a 5 euro donation by direct debit

- Volunteer to fund-raise for People Aid
- Volunteer to work with People Aid
- Tell others about People Aid – via text, facebook etc
- Leave a legacy to People Aid e.g in your will
- Lobby the Government to support People Aid
- Lobby the Government to remove support from People Aid

2. Claimed Support (relative to other causes)

Can you privately indicate how you'd like to allocate the money in your own way. No pressure to make any decision:

- Keep yourself
- Donate to Science Gallery
- Donate to People Aid
- Donate to St. Vincent De Paul
 - Irish poverty –related charity

3. Actual Financial Support (relative to other causes)

Many thanks for doing this experiment. Here is a euro as a small thanks for doing it. Can you privately indicate how you'd like to allocate the money in your own way. No pressure to make any decision:

- Keep yourself
- Donate to Science Gallery
- Donate to People Aid
- Donate to St. Vincent De Paul
 - Irish poverty –related charity

4. Thank You/Debriefing

Take people through debriefing (Mediators)

One last thing, as you might know the Irish Government is currently undergoing a review on the overall approach to Aid and Development.

Would you mind answering a few last questions on this topic?

Accuracy of Estimates on Irish Government Expenditure on Overseas Aid

- 1. What do you think is the current % of government expenditure hat Ireland as a country currently gives to aid and development overseas?
- 2. Do you believe this level is:
Too Much

About right

Too little

3. If the Irish Government had 100 Euro extra to spend, and had decided to distribute it between the three causes below, how would you advise them to distribute it?

Aid and Development in poor countries

Helping the poor in Ireland

Supporting initiatives like the Science Gallery

OR (randomly rotate)

4. If the Irish Government had overspent 100 Euro, and had decided to cut 100 Euro across the three causes below, how would you advise them to distribute the cut?

Aid and Development in poor countries

Helping the poor in Ireland

Supporting initiatives like the Science Gallery

The results will be shared with Irish Aid and fed into the process of consultation, which has been taking place. Many thanks.

Appendix D – Scree-plot and Table of Un-rotated Loadings for Factor Analysis on Dependent Variables in Lab-Experiment

Correlation Matrix

		Donationnow	donateDD	fundraise	volunteer	tellothers	legacy	lobbysupport	givePA	actualgivePA
Correlation	Donationnow	1.000	.637	.435	.369	.368	.453	.478	.107	.217
	donateDD	.637	1.000	.330	.335	.356	.406	.337	.100	.157
	fundraise	.435	.330	1.000	.777	.514	.459	.515	.132	.176
	volunteer	.369	.335	.777	1.000	.496	.400	.469	.128	.114
	tellothers	.368	.356	.514	.496	1.000	.563	.529	.109	.138
	legacy	.453	.406	.459	.400	.563	1.000	.625	.168	.201
	lobbysupport	.478	.337	.515	.469	.529	.625	1.000	.039	.163
	givePA	.107	.100	.132	.128	.109	.168	.039	1.000	.735
	actualgivePA	.217	.157	.176	.114	.138	.201	.163	.735	1.000
Sig. (1-tailed)	Donationnow		.000	.000	.000	.000	.000	.000	.063	.005
	donateDD	.000		.000	.000	.000	.000	.000	.076	.031
	fundraise	.000	.000		.000	.000	.000	.000	.029	.017
	volunteer	.000	.000	.000		.000	.000	.000	.032	.086
	tellothers	.000	.000	.000	.000		.000	.000	.059	.049
	legacy	.000	.000	.000	.000	.000		.000	.008	.008
	lobbysupport	.000	.000	.000	.000	.000	.000		.286	.026
	givePA	.063	.076	.029	.032	.059	.008	.286		.000
	actualgivePA	.005	.031	.017	.086	.049	.008	.026	.000	

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.759
Bartlett's Test of Sphericity	Approx. Chi-Square	570.309
	df	36
	Sig.	.000

Communalities

	Initial	Extraction
Donationnow	1.000	.507
donateDD	1.000	.402
fundraise	1.000	.627
volunteer	1.000	.569
tellothers	1.000	.556
legacy	1.000	.577
lobbysupport	1.000	.604
givePA	1.000	.867
actualgivePA	1.000	.865

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	3.952	43.909	43.909	3.952	43.909	43.909
2	1.622	18.027	61.936	1.622	18.027	61.936
3	.996	11.065	73.001			
4	.770	8.561	81.562			
5	.511	5.673	87.235			
6	.383	4.250	91.485			
7	.318	3.531	95.016			
8	.249	2.767	97.783			
9	.200	2.217	100.000			

Extraction Method: Principal Component Analysis.

Scree Plot

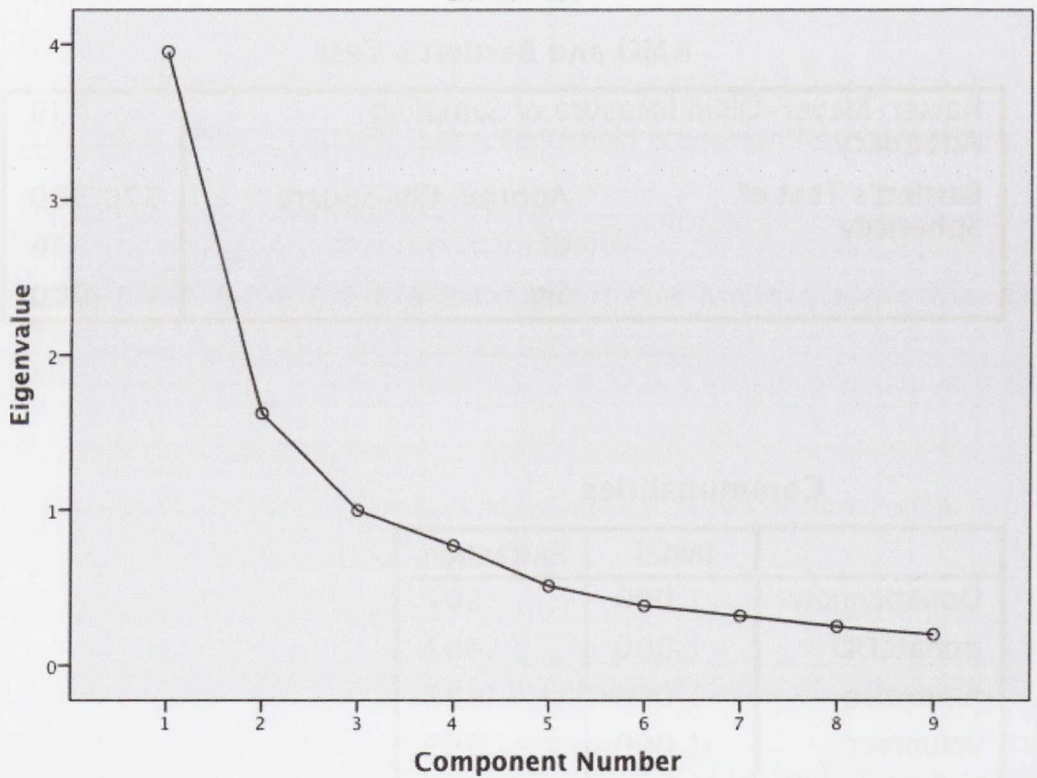


Figure 1 – Scree-Plot of Unrotated Loadings

Table 1 – Component Matrix of Unrotated Loadings

Component Matrix^a

	Component	
	1	2
Donationnow	.711	
donateDD	.632	
fundraise	.781	
volunteer	.738	
tellothers	.732	
legacy	.758	
lobbysupport	.756	
givePA		.887
actualgivePA	.359	.858

Extraction Method: Principal Component Analysis.

a. 2 components extracted.

Total Variance Explained

Component	Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %
1	3.808	42.314	42.314
2	1.766	19.622	61.936

Extraction Method: Principal Component Analysis.

Component Transformation Matrix

Component	1	2
1	.969	.248
2	-.248	.969

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

Rotated Component Matrix^a

	Component	
	1	2
Donationnow	.699	.133
donateDD	.625	.107
fundraise	.788	.070
volunteer	.754	.032
tellothers	.744	.045
legacy	.747	.137
lobbysupport	.777	.014
givePA	.055	.929
actualgivePA	.135	.920

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 3 iterations.

Appendix E– Scree plot and Table of Un-rotated Loadings for Factor Analysis on Ideal Charity Semantic Differentials

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.	.557
Approx. Chi-Square	118.738
Bartlett's Test of Sphericity Df	36
Sig.	.000

Correlation Matrix									
	idealcrisis	irelandworld	passionprofess	popularpersonali	irishoriginlocal	emotionexpert	resourcescarcity	frugalmeasure	religiousecular
Sig. (1-tailed)	idealcrisis	.022	.022	.333	.105	.052	.065	.198	.064
	irelandworld	.022	.182	.105	.004	.313	.347	.032	.350
	passionprofess	.002	.182	.034	.055	.000	.436	.265	.034
	popularpersonal	.333	.105	.034	.003	.000	.000	.006	.171
	irishoriginlocal	.105	.004	.055	.003	.115	.409	.181	.187
	emotionexpert	.052	.313	.000	.009	.115	.343	.000	.223
	resourcescarcity	.065	.347	.436	.000	.409	.343	.082	.056
	frugalmeasure	.198	.032	.265	.006	.181	.000	.082	.443
	religiousecular	.064	.350	.034	.171	.187	.223	.056	.443

Communalities

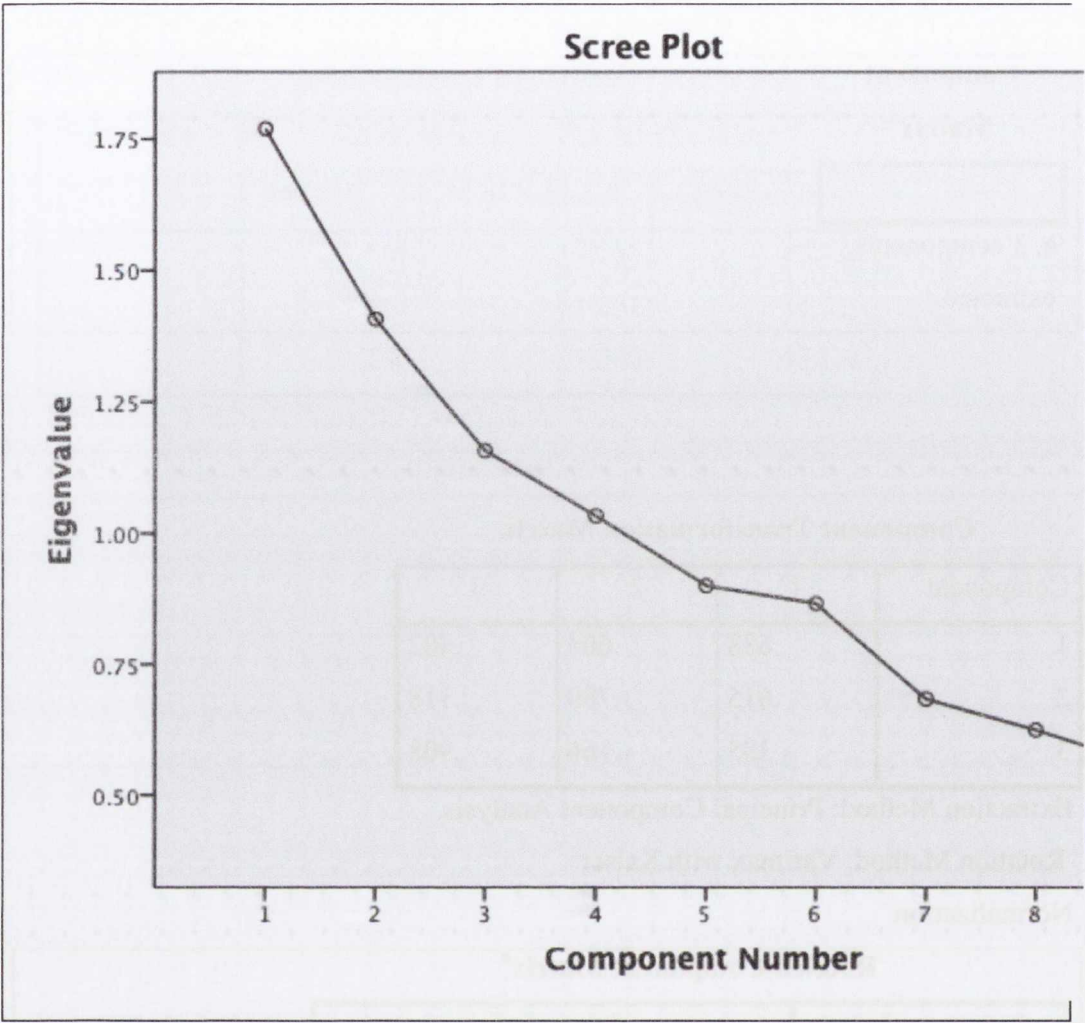
	Initial	Extraction
Idealcrisis	1.000	.456
irelandworld	1.000	.716
passionprofess	1.000	.556
popularpersonal	1.000	.673
irishoriginlocal	1.000	.489
emotionexpert	1.000	.683
resourcescarcity	1.000	.745
frugalmeasure	1.000	.461
religiousecular	1.000	.590

Extraction Method: Principal Component Analysis.

Total Variance Explained

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.770	19.664	19.664	1.770	19.664	19.664
2	1.408	15.639	35.303	1.408	15.639	35.303
3	1.158	12.863	48.166	1.158	12.863	48.166
4	1.033	11.481	59.648	1.033	11.481	59.648
5	.900	10.004	69.651			
6	.866	9.627	79.278			
7	.684	7.598	86.876			
8	.624	6.939	93.814			
9	.557	6.186	100.000			

Extraction Method: Principal Component Analysis.



Component Matrix^a
a. 3 components extracted.

Component Transformation Matrix			
Component	1	2	3
1	.688	.604	.402
2	.615	-.780	.118
3	-.385	-.166	.908

Extraction Method: Principal Component Analysis.
 Rotation Method: Varimax with Kaiser
 Normalization.

Rotated Component Matrix ^a			
	Component		
	1	2	3
resourcescarcity	.673	-.218	-.158
popularpersonal	.631	.107	.266
frugalmeasure	.517	.146	.131
passionprofess	.145	.728	
Idealcrisis	-.138	.648	
emotionexpert	.460	.558	
irishoriginlocal	.158	.114	.670
irelandworld	.204	-.332	.650
religiousecular	-.325	.261	.519

Extraction Method: Principal Component Analysis.
 Rotation Method: Varimax with Kaiser Normalization.
 a. Rotation converged in 6 iterations.

Total Variance Explained

Component	Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %
1	1.542	17.135	17.135
2	1.533	17.031	34.166
3	1.260	14.000	48.166

Extraction Method: Principal Component Analysis.

**Appendix F– List of Weekly Questions for the National Happiness
Experiment (2012), administered via SMS.**

Week 1 (Thurs 24/05)

1. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 1. Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)
2. Q.2: On a scale of 1-10 how satisfied with life in general do you feel? (Reply numerically)
3. Q.3: What gender are you? (Reply M or F only)
4. Q.4: What age are you? (Numerical reply only)
5. Q.5: Are you a parent or a grand-parent? (Reply yes, no or both)
6. Q.6: On a scale of 1-10 how religious would you say you are? (Numerical reply only)
7. Q.7: Finally, on a scale of 1-10 how healthy do you feel? (Numerical reply only)
8. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. Visit www.sciencegallery.com/happy/nationalexperiment for info.

Week 2 (Friday 01/06)

9. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 2 using the following 1-10 rating scale:
where 1 = "not at all" , and 10 = "very much so"
10. Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)
11. Q.2: On a scale of 1-10 how satisfied with life in general do you feel? (Reply numerically)
12. Q.3: On a scale of 1-10 how happy do you feel now compared to your estimation of the average person of your age and gender? (Numerical reply

only) (RANDOMISED HALF) -1= MUCH LESS HAPPY, 10= MUCH MORE HAPPY

13. How happy do you think the average person of your age and gender is compared with you? (RANDOMISED HALF) -1= MUCH LESS HAPPY, 10= MUCH MORE HAPPY

Q.4: On a scale of 1-10, in general, do you feel that Ireland is a fair place? (again, where 1 = “not at all” , and 10 = “very much” Numerical reply only)

Q.5: On a scale of 1-10, in general, do you feel that powerful people are kept in check by media, law and public opinion? (where 1 = “not at all” , and 10 = “very much”, Numerical reply only)

14. Q.6: Using the same scale of 1-10, in general, do you feel that Ireland has a unique and valuable identity? (Numerical reply only)
15. Q.7: Finally, did you vote in the referendum yesterday? (Reply V for Voted, or D for Did not vote)
16. RANDOMISED HALF. Thanks for taking the time to answer this week’s questions. We will contact you next week for more information. Visit www.xxxxxxxxxxxxxxxxxx.com for some of the results from the National Happiness Experiment.
17. RANDOMISED HALF. Thanks for taking the time to answer this week’s questions. We will contact you next week for more information. In week 1, the average happiness score was 7.02 and the average life satisfaction score was 6.7. Visit www.xxxxxxxxxxxxxxxxxx.com for some of the other results from the National Happiness Experiment.

Week 3 (Thurs 07/06)

18. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 3 using the 1-10 rating scale:

where 1 = “not at all” , and 10 = “very much so”

19. Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)

20. Q.2: On a scale of 1-10 how satisfied with life in general do you feel?
(Numerical reply only)
21. Q.3: On a scale of 1-10 how proud to be Irish do you feel? (Numerical reply only)
22. Q.4: Finally, on a scale of 1-10 how proud to be European do you feel?
(Numerical reply only)
23. On a scale of 1-10 how religious would you say you are? (Numerical reply only)
24. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. Visit www.aaaaaaaaaaaaaaaa.com for some of the results from the National Happiness Experiment.
25. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. In week 2, the average happiness score was Y.YY and the average life satisfaction score was ZZZ. Visit www.aaaaaaaaaaaaaaaa.com for some of the other results from the National Happiness Experiment.

Week 4 (Thurs 14/06)

26. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 4 using the following 1-10 rating scale:
- where 1 = "not at all" , and 10 = "very much so"
27. Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)
28. Q.2: On a scale of 1-10 how satisfied with life in general do you feel?
(Numerical reply only)
29. Q.3: How many positive things have happened to you in the last 24 hours?
(Numerical reply only)
30. Q.4: How many negative things have happened to you in the last 24 hours?
(Numerical reply only)

31. Q.5: These days you can be contacted most times of the day and night. On a scale of 1-10 how good does this make you feel? (Numerical reply only)
32. Q.6: Finally, these days you can contact other people most times of the day and night. On a scale of 1-10 how good does this make you feel? (Numerical reply only)
33. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. Visit www.xxxxxxxxxxxxxxxxxx.com for some of the results from the National Happiness Experiment.
34. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. In week 3, the average happiness score was 6.6 and the average life satisfaction score was 6.62. Visit www.xxxxxxxxxxxxxxxxxx.com for some of the other results from the National Happiness Experiment.

Week 5 (Thurs 21/06)

35. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 5 using the 1-10 scale:

where 1 = "not at all" , and 10 = "very much so"

36. Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)
37. Q.2: On a scale of 1-10 how satisfied with life in general do you feel?
(Numerical reply only)
38. Q.3: How many kind deeds have you done for anyone today? (Numerical reply only)
39. Q.4: Finally, how many kind deeds have been done for you today that you are aware of? (Numerical reply only)
40. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. Visit

www.xxxxxxxxxxxxxxxxxx.com for some of the results from the National Happiness Experiment.

41. RANDOMISED HALF. Thanks for taking the time to answer this week's questions. We will contact you next week for more information. In week 4, the average happiness score was 6.68 and the average life satisfaction score was 6.58. Visit www.xxxxxxxxxxxxxxxxxx.com for some of the other results from the National Happiness Experiment.

Week 6 (28/06)

42. Thanks for participating in the National Happiness Experiment. Please take a few minutes to answer the questions that follow for week 6 using the 1-10 scale:

where 1 = "not at all" , and 10 = "very much so"

43. . Q.1: On a scale of 1-10 how happy do you feel now? (Numerical reply only)
44. Q.2: On a scale of 1-10 how satisfied with life in general do you feel?
(Numerical reply only)
45. Q.3: On a scale of 1-10 how likely would you be to do a kind deed for somebody today? (Numerical reply only)
46. Q.4: On a scale of 1-10, how likely would you be to ask for help from others today if you needed it? (Numerical reply only)
47. Q.5: On a scale of 1-10 how optimistic do you feel for your future?
(Numerical reply only)
48. Q.6: On a scale of 1-10 how optimistic do you feel for Ireland's future?
(Numerical reply only)
49. Q.7: On a scale of 1-10 how healthy do you feel? (Numerical reply only)
50. Finally, how many times did you check our website to see the results over the six week period of the experiment? (Numerical reply only)
51. Thanks so much for taking part in the National Happiness Experiment – we really do appreciate it. This was the last week and we will be presenting the

results throughout 2012, but you can also visit www.xxxxxxxxxxxxxxxxxx.com for results info.

52. If you have any comments you want to send in less than xxxx characters, please do so, for free.

FEEDBACK

Weekly feedback to randomized half of sample.
Feedback to consist of aggregated feedback only on each of the previous weeks questions.

See Week 2 for specific randomised feedback text.

Appendix G – Scree-plot and Table of Un-rotated Loadings for Factor analysis on Pro-social Behaviour and Intentions

KMO and Bartlett's Test		
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.511
Approx. Chi-Square		1439.159
Bartlett's Test of Sphericity	Df	6
Sig.		.000

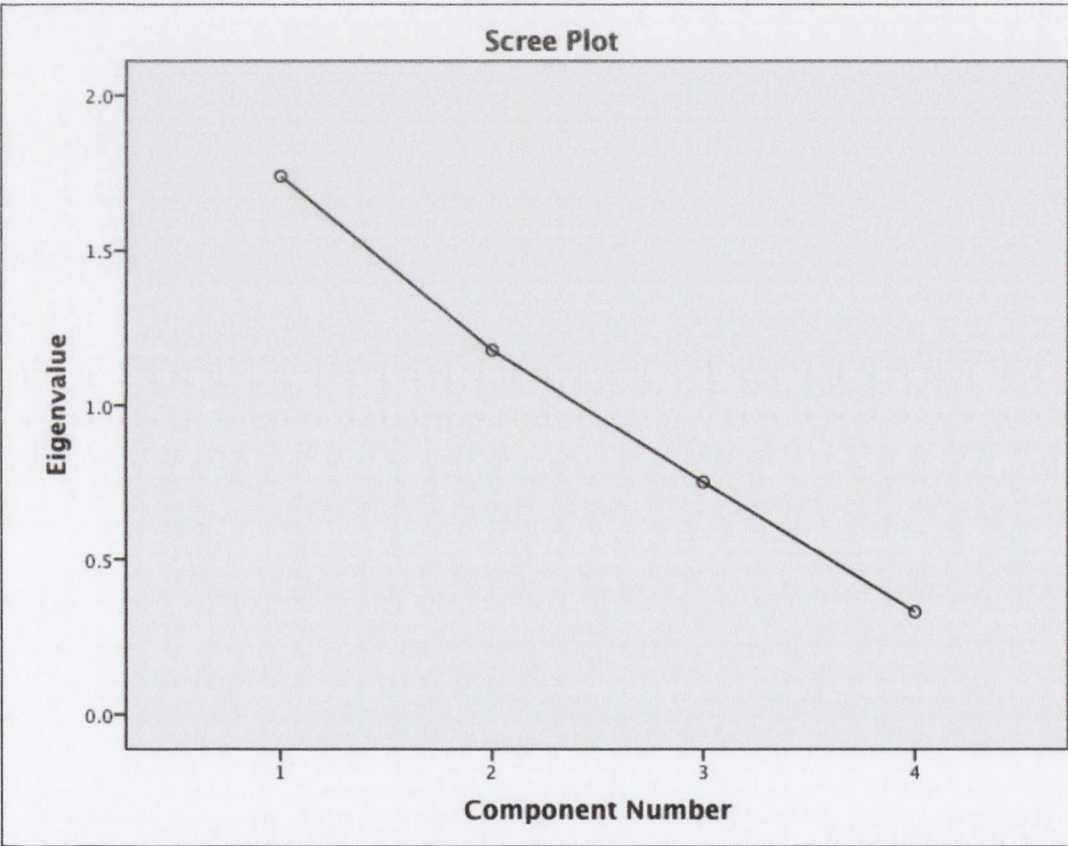
Correlation Matrix			
	Kinddeedsdone	Kinddeedsreceived	Kinddeedslikely
Kinddeedsdone	1.000		
Kinddeedsreceived	.000	1.000	
Kinddeedslikely	.000	.000	1.000
Askhelpflikely	.014	.000	.000

Communalities		
	Initial	Extraction
Kinddeedsdone	1.000	.834
Kinddeedsreceived	1.000	.827
Kinddeedslikely	1.000	.612
Askhelpflikely	1.000	.645

Extraction Method: Principal Component Analysis.

Total Variance Explained						
Component	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	1.741	43.524	43.524	1.741	43.524	43.524
2	1.177	29.436	72.960	1.177	29.436	72.960
3	.751	18.766	91.725			
4	.331	8.275	100.000			

Extraction Method: Principal Component Analysis.



Component Matrix ^a		
	Component	
	1	2
Kinddeedsdone	.870	-.279
Kinddeedsreceived	.867	-.275
Askhelpflikely	.295	.747
Kinddeedslikely	.383	.682

Extraction Method: Principal Component Analysis.

Appendix H- Interview Protocol for Analysis for Oxfam Decision Maker
(detailed interview transcript and analysis of themes and emergence of themes to follow – 40 pages)

