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# Philanthropy – The North East Story

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## Abstract

This paper surveys the history of philanthropy in the North East of England over a period of more than 900 years, from the time the North East was brought under Norman control (thirty years or so after the Conquest of 1066) down to the present. We paint a broad picture of the role philanthropy has played in the region across the ages, and demonstrate how past endeavours continue to enrich present lives. On the basis of the evidence presented we draw 10 main conclusions: (1) The North East has a long and rich history of philanthropy; (2) There are distinctive aspects to philanthropy in the North East stemming from the concentration of power in the hands of the Bishops of Durham and the merchant community of Newcastle; (3) Enterprise is the motor force of philanthropy; (4) Philanthropy is a major source of social innovation; (5) Social activism is essential to the success of philanthropic ventures; (6) Philanthropy is not just about mega-donors. (7) Prestigious institutions are magnets for philanthropy; (8) Institutions founded on philanthropy must adapt to survive; (9) Philanthropy is a two-way street: improving the lives of beneficiaries while a source of intense satisfaction for donors; (10) Philanthropy in the past lives on in the present. We conclude by answering four fundamental questions about the past, present and future of philanthropy, and present a summary table highlighting the main domains of philanthropy across the more than nine centuries.

## Keywords

Philanthropy, North East England, Economy, Society, Social Innovation

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## Introduction

There is a small but rich and informative literature on the history of philanthropy in Britain, but very little specifically on philanthropy in the North East of England (Button & Sheets-Nguyen, 2014; Ben-Amos, 2008; Gray, 1905, 1908; Jordan, 1959; Owen, 1965; Prochaska, 1980, 1988, 1990). Our research is intended to help remedy the situation by surveying the history of philanthropy in the region over a period of more than 900 years, from the time the North East was brought under Norman control – thirty years or so after the Conquest of 1066 – down to the present. Our purpose is not to provide a detailed chronological account of philanthropic initiatives nor an in-depth exploration of specific themes, but rather to paint a broad, suggestive picture, supported by the available evidence, in order to draw significant conclusions and lessons for the present.

This article is intended for readers who want to read the headlines and conclusions of our research without ploughing through the detailed histories on which they are based. In turn, we provide a brief explanation of what counts as philanthropy and what is excluded; short overviews of each of the four eras of philanthropy in North East England; the top ten findings emerging from our research; and a general conclusion reflecting on the past, present and future of philanthropy.

## What counts as philanthropy?

We define philanthropy as *voluntary giving by private individuals, couples, families or corporate bodies to promote charitable causes, projects or organizations*; what Payton and Moody (2008: 28) express more succinctly as “voluntary action for the public good.” The key criteria are *voluntary* and *public good*, thus excluding projects, initiatives and services provided by governments and financed by taxation, which is *compulsory*, enforced by authority with the backing of the law. Support provided by individuals for households or extended families may often be generous but is never philanthropic because it is for *private* not public benefit. It follows that acts of philanthropy only occur:

- a. when the person making a gift is *not compelled* to do so;
- b. when the gift benefits people with whom the giver is *not directly connected* (excluding relatives, friends and employees);
- c. the gift is made from the giver’s *personal resources*, not resources controlled by them but owned by others;
- d. the giver *does not receive a material benefit* in return for the gift.

Applying these criteria strictly is important because it limits the tendency to exaggerate the extent of philanthropy or to mistakenly believe that an action is philanthropic when in fact it is not. It is a common mistake, for example, to regard the apparent generosity of paternalistic business leaders in providing housing and welfare benefits for employees as philanthropic (Finlayson, 1992: 45-63). Such acts may indeed be *enlightened*, but they do not qualify as philanthropic because they fail to satisfy conditions (b) and (d), and, when the gift is made by a manager who is not the owner, condition (c) also. For similar reasons, it is mistaken to regard politicians spending public funds or chief executives of private or third sector organizations

sanctioning charitable gifts as acts of philanthropy. They are not, primarily because they fail to satisfy condition (c).

The objective criteria applied in determining whether a gift may legitimately be classified as philanthropic have no bearing on judgements relating to the magnitude, form or intrinsic worth of philanthropic gifts. This is because these matters are subjective and depend crucially on value judgements. It is not possible, for example, to justify imposing an arbitrary minimum value before a gift is classified as philanthropic. People who make a donation of dried or canned goods to a foodbank are behaving in the same philanthropic spirit as those who endow a scholarship for disadvantaged children attending university. The particular form taken by a gift likewise is value neutral. Gifts of money are not intrinsically superior to gifts of labour or gifts in-kind. Volunteering, for example, may be as critical to the effective operation of front-line charities as cash donations. Finally, it is wrong in principle to distinguish between good and bad philanthropic causes, providing the cause is legal. Hence, we assert, giving to combat poverty is not necessarily more worthy than giving to support the promotion of religious beliefs, although the utilitarian philosopher Peter Singer (2009, 2015) would disagree.

## Researching the history of philanthropy in the North East

Our historical study of philanthropy in North East of England has been framed in accord with these considerations in two main respects. First, we have tried to identify as philanthropy those actions and initiatives that satisfy the objective criteria outlined above, so as to avoid exaggeration and over-claiming. Second, we have taken the view that philanthropy is a phenomenon that extends to people of widely varying means, who contribute in different ways to a rich variety of causes in the belief that their donation will help improve the lives of unrelated others (Breeze & Lloyd, 2013; Davies, 2015).

Beginning with only a fragmentary knowledge of philanthropy in the North East, we began by exploring regional and local histories to pick up insights and likely instances of significant philanthropic acts through the ages (Brand, 1789; Cannon, 2016; Lomas, 1992, 1996, 1999, 2009; MacKenzie, 1827; McCord, 1979; McCord & Thompson, 1998; Parson & White, 1828; Purdue, 2011; Whiting, 1932, 1940). We created three linked spreadsheets to record the basic details of

- candidate philanthropists,
- sites and beneficiaries of philanthropy, and
- philanthropic trusts and foundations.

These were grouped into four historical eras because philanthropic acts can only properly be understood with reference to the context, beliefs, values and social practices prevailing at the time. Availability of an existing literature on philanthropy at the national level was helpful in this regard (Ben-Amos, 2008; Button & Sheets-Nguyen, 2014; Gray, 1905, 1908; Jordan, 1959; Owen, 1965; Prochaska, 1980, 1988).

Our next step was to research candidate philanthropists, sites and beneficiaries, and philanthropic trusts and foundations, using mainly publicly available sources, supplemented

whenever feasible, given resource constraints, by archival data or, in the case of living philanthropists, data obtained through interviews. A particularly valuable published source for individual philanthropists is the *Oxford Dictionary of National Biography* (ODNB, 2018), but in many cases the available sources are fragmentary and incomplete. The general rule applies that the further you go back in time, the harder it is to gather reliable information. For the contemporary period, there is systematic data on trusts and foundations and beneficiaries from the returns made to the Charity Commission, and many long-lived organizations have useful websites containing historical information. There are also, in some cases, published or unpublished lists of donors, generally referred to as subscribers, to particular philanthropic causes such as hospitals and universities. Such lists are very important because they demonstrate convincingly that many philanthropic projects are the product of collective rather than individual endeavours. All in all, the process of gathering and ordering information on individuals, sites and beneficiaries and trusts and foundations is best described by the term *bricolage*, “the construction or creation of a work from a diverse range of things that happen to be available” (Oxford Living Dictionaries Online).

To help us see the bigger picture from the many fragments of information gathered we have engaged in three main sensemaking processes. First, we have worked from the grass roots up to develop a picture of philanthropy in the North East during the medieval, early modern, modern and contemporary eras respectively. This has involved writing profiles based on available sources for 110 notable philanthropists, 105 beneficiaries of philanthropy, and 33 charitable trusts and foundations based in the North East. Notable philanthropists have been selected on the basis of proven significant contributions to important philanthropic causes. Beneficiaries have been selected that have a current annual philanthropic income of £100,000 or more. Trusts and foundations have been selected that currently make grants totalling £100,000 or more per annum. Images have been gathered to illustrate profiles whenever possible. The work is ongoing, and it is likely that the number of profiles will grow in due course.

The second main sensemaking process has been to create and interrogate research data sets for beneficiaries and trusts and foundations to answer questions about the magnitude of philanthropy, causes supported, and the relative importance of philanthropy to beneficiaries. A particularly important aspect of this work is to distinguish between the types of contribution made by philanthropy, which, broadly speaking, are threefold:

- 1) the provision of *infrastructure* such as buildings and facilities;
- 2) the provision of *endowment*, assets such as property or stocks and shares that yield an annual income to support of on-going operations;
- 3) the provision of financial and other *immediate use resources* in support projects or ongoing operations.

When this information is available, it is possible to compute the *philanthropic income* of beneficiaries in any given year. Philanthropic income is the value of incoming resources to an organization from all *bona fide* philanthropic sources, including voluntary donations and legacies, income from endowment, and grants from charitable trusts and foundations.

Specifically excluded are income from trading and contracts and grants from government bodies or quangos. By calculating philanthropic income, it is possible to determine the relative importance of philanthropy to the on-going activities of different types of third sector organizations.

The third main sensemaking process employed has been to set our profiles, statistical computations and original data sources (documents and interviews) within the context of the existing literatures on philanthropy, the history of philanthropy in Britain, and the history of the North East, asking three fundamental questions: What have we found that confirms existing knowledge and conventional understandings? What have we found that is at odds with existing knowledge and conventional understandings? What have we found that was previously not known or fully understood?

## Four Philanthropic Eras

### *1. North East Philanthropy in the Middle Ages (1100 – 1500)*

#### *Context*

At the time of the Norman Conquest in 1066, England had a small population of about 1.7 million that lived primarily off the land. The population of the North East was very small, about 20,000 people, thinly spread across the region with few major settlements other than Bamburgh and Durham (Broadberry et al., 2015, Hinde, 2003). The North East, in effect, was part of a geographically extensive buffer zone between Scotland to the North and the more prosperous parts of England south of the Tees. After 1095, when the Normans finally gained control of the region, County Durham fell under the control of the Bishop of Durham who exercised secular as well as religious authority, and Northumberland under an Earl appointed by the King. Large estates consisting of numerous townships were granted to Norman Lords who set about increasing the income they could extract from their estates. Agricultural settlements multiplied and new towns were created as centres of industry, commerce and administration (Miller & Hatcher, 2014). In the North East, Newcastle was foremost amongst these. By 1290 the population of England had grown to 4.75 million and that of the North East to 223,600, of which 75,500 resided in County Durham and 148,100 in Northumberland (Broadberry et al., 2015: 25). There followed the devastating consequences of the Black Death of 1348 and subsequent bouts of plague that caused the English population to plummet to 1.9 million in 1450, after which a gradual recovery began, reaching 2.35 million in 1522. The North East suffered especially badly from plague and devastating raids by King Robert I of Scotland between 1307 and 1329 (Lomas, 1996: 38-44), causing the population to shrink to just 55,000 in 1377, recovering to 149,400 in 1600. Paradoxically, the reduced population placed rural workers in a much stronger position, causing the old manorial order to begin to crumble and real wages to rise, improving the living standards of agricultural labourers before the population once again began to rise.

#### *Philanthropy*

With government effectively de-centralized and wealth very unevenly divided, the conditions existed for major philanthropic initiatives, especially in the two and a half centuries before the Black Death. There were seven main loci of activity, three religious, two religious-secular, and two secular.

#### *Religious causes*

- **Church Building.** The Norman aristocracy was deeply Catholic in its beliefs and motivated to build or re-build churches and chapels across the region and to endow them with the lands needed to help pay priests and beautify and maintain church buildings. Norman lords were

not obliged in to do this, but it was socially expected and conferred upon them the power of patronage in the appointment of priests. Levels of generosity in endowments varied dramatically.

- **Religious Houses.** Even more religiously worthy than church building was the building and endowing of religious houses for monks and nuns. The North East had none of these at the time of conquest save the Community of St Cuthbert at Durham. Ten monasteries or monastic cells and three nunneries were founded in the region, mainly in the twelfth century, and prospered until their dissolution by Henry VIII.
- **Chantries.** One of the commonest ways of supporting the church, paying priestly salaries, was to endow a chantry. This involved making over to the church land or other rental property whence the priest would say prayers of redemption for the benefactor and other nominees to limit their time in purgatory (Burgess, 1987). In Newcastle alone, 27 chantries had been founded before their banishment by Henry VIII (Brand, 1789).

#### *Religious-secular causes*

- **Hospitals.** The wealthy churchmen, landowners and merchants further expressed their piety and love of God by founding 'hospitals', places of hospitality, to care for the sick and elderly. The most generously endowed of these, all of which are still in existence today, were [Christ's Hospital at Sherburn \(1181\)](#), near Durham, St Mary's Hospital (c. 1185) in Newcastle, the St Mary Magdalene Hospital (1250) in Newcastle, and the Hospital of God in Greatham (1273).
- **Cathedral and collegiate schools.** The grammar and collegiate schools of the period, notably Durham School, founded in 1414 by [Bishop Thomas Langley](#), had both religious and secular dimensions, preparing some boys for the priesthood while educating others intent on secular careers (Leach, 1969).

#### *Secular causes*

- **Economic fabric.** Philanthropic initiatives were important in creating the infrastructure needed for economic development, an empathically secular concern, through the provision of roads, bridges, marketplaces and the like. Many of these, like the village green and medieval bridge over the river Coquet at Warkworth, were funded by philanthropy (Parson & White, 1828: 546-49).
- **Ales.** We know that philanthropy was not always about wealthy benefactors, the poor of medieval times also used philanthropy to help themselves. By the ubiquitous institution of the *ale*, a form of communal entertainment at which beer was sold at inflated prices to generate funds, ordinary folk were able to help their churches, newly-weds and those who had fallen on hard times (Bennett, 1992).

## *II. North East Philanthropy in the Early Modern Era (1501 – 1750)*

### *Context*

Following repeated bouts of plague and pestilence, it was not until the early decades of the sixteenth century that England's population recovered to reach 2.35 million in the early 1520s, 4.27million in 1600 and 5.31 million in 1650 (Broadberry et. al, 2015: 3-45). In the North East, the population recovered from an estimated 54,976 in 1377 to 149,406 in 1600, of whom 76,483 resided in County Durham and 72,923 in Northumberland. In fact, the population of both counties grew more rapidly between 1377 and 1600 than the national annual average rate (Broadberry et al., 2015: 22-27). This marked a bounce-back in economic fortunes that was to persist during the remainder of the early modern era. Four main forces shaped the era.

- **State formation:** the era is marked by the union of the crowns (1603), civil war and commonwealth (1642-60), the Glorious Revolution and Bill of Rights (1688), and the union of parliaments (1707). Less visible but equally transformational was the progressive increase in cooperation between local elites and national government. Central government came to rely heavily on unpaid local officials to raise money, provide local services and deliver justice. This partnership made the state as a whole an increasingly powerful actor (Braddick, 2000).
- **Economic development:** England was transformed by “a process of commercialisation” that saw “a patchwork of loosely articulated... regional economies... transformed into an integrated economic system in which market relationships were the mainspring of economic life” (Wrightson, 2002: 331). Early modern England experienced substantial economic growth with beneficial consequences for living standards, as agricultural improvements increased productivity, and as mining, manufacturing, services and trade all prospered (Coleman, 1977). In the North East, coal became King, producing 1,225,000 tons of coal per annum by the 1680s, 42% of national output, of which the greater part left the region by sea, mainly from Newcastle, for London and continental Europe (Pollard, 1980: 216).
- **English Reformation:** this saw the English church break from the Catholic Church in 1534 when Henry VIII declared himself supreme head of the church in England. The break from Rome opened the door to Lutheran Protestantism, which held, in opposition to Catholicism, that faith alone, not penitence and the allied practices of confessionals, indulgences and chantries to limit time in purgatory, was the only way to secure the grace of God and enter Heaven (Burgess, 1987). Monasteries, nunneries and friars were swept away and Catholicism was replaced by Anglicanism.
- **Shifting balance of power:** the balance of population shifted from rural to urban and the balance of power in society from landlords to merchants, mine owners, manufacturers and professionals. (Coleman, 1975). The distribution of income between rich and poor widened, and the percentage of households living at or below the poverty line reached 24.2% in 1688 (Broadberry et al., 2015: 307-39), explaining the mounting concern during the Tudor period with problems of poverty and vagrancy, culminating in the passing of the Poor Relief Act of 1601, which made parishes responsible for the poor in the expectation that the wealthy would voluntarily contribute most.

### *Philanthropy*

Jordan (1959) argued that before and after the 1601 act the aristocratic and merchant elites of England contributed most generously to the eradication of poverty by “a great variety of undertakings” (p. 17). He finds support in a recent exhaustive study by Ben-Amos (2008) who concludes that the philanthropic impulse ran broad and deep across English society, helping explain the “increased scale of endowments and bequests that were channelled via numerous guilds and parishes into hundreds of institutions such as almshouses, hospitals and schools, as well as varied relief programs” (p.379). There is support for this proposition based on the experience of North East. Here we find that the clergy continued to play a major role in philanthropy alongside the aristocratic and merchant elites. In particular, the wealth of churchmen in Durham gave them the means to take the initiative in philanthropic ventures. Most notable was [Nathaniel Crewe \(1633-1721\)](#) who by his will left his northern estates in trust. The trust became one of the prime movers in the provision of free village schools (Cannon, 2016: vol.2, 184). His acolytes, Archdeacons of Durham [Thomas](#) and [John Sharp](#), trustees of [Lord Crewe’s Charity](#), committed themselves to the restoration and improvement of Blanchland (the market square and bridge over the Derwent) and Bamburgh (castle restoration, library, schools for boys and girls, almshouse for aged sailors, ‘cheap shop’ selling subsidized food, and

surgery), culminating in 1789 with the opening of the world's first lifeboat station, complete with the specially commissioned and patented 'unsinkable' Lukin boat. More generally, education and support for the poor and vulnerable were the two great philanthropic causes of the period. The favoured cause of religion remained. At St Andrew's in Newcastle, for example, [Sir William Blackett](#) bequeathed £1,000 at his death in 1705 for the church to buy an estate to provide income in perpetuity, which down to the present yields £200,000 per annum (Charity Commission, 2018).

- **Education:** progressed in two waves, first the founding of classical grammar schools, second the founding of non-classical elementary schools. The first wave saw the founding of 17 (10 in Northumberland and 7 Durham) grammar schools and the re-founding of Durham School in 1551. Several were ill-conceived ventures in towns too small to sustain them or with inadequate endowments. Some did very well and passed the test of time, including the Kepier School at Houghton-le-Spring (1574) and Morpeth (1552) with [Newcastle Grammar \(1545\)](#) and Durham School excelling if judged by numbers of pupils progressing to Cambridge and Oxford (Cannon, 2016). The second wave of philanthropic foundations saw a total of 136 free-of-charge elementary schools founded across the North East before 1750, of which 54 were in County Durham and 82 in Northumberland (Cannon, 2016, vol.2: 61-63 and 186-88). The vast majority, 87.5%, were founded after 1700 when the charity school movement really took off. It was the entrepreneurial class of merchants, mine owners and manufacturers who took the lead while living or at death by endowing charity schools.
- **Support for the poor and elderly** took two main forms. The first was the provision of *almshouses* to accommodate poor, elderly people who otherwise would have been condemned to vagrancy. Several were established by guilds or other corporate bodies, typically to serve a particular constituency. In Newcastle, for example, the Trinity Almshouses, founded in 1584, catered for 26 aged seamen and their widows; the Freemen's Hospital, also known as the [Holy Jesus Hospital](#), catered for 38 Freemen or their widows who had fallen on hard times; and, the Keelmen's Hospital for 54 aged and infirmed keelmen, their spouses or their widows. The second form of support was relief in the form of *parochial handouts* paid from charitable trusts established by benefactors while living or as an estate gift. The best evidence we have is for Newcastle where endowing a trust fund with land, houses or cash was common practice amongst the better off members of society; with 97 permanent endowments funds established between 1601 and 1750 at the rate of two every three years (Brand, 1789: 111-13; 186-88; 270-74; 371-73). Fourteen of the 97 were established by women and 83 by men. The average value of the capital donated was £70.28, yielding £2.81 per annum for distribution to the poor, and a cumulative total for all 97 endowments of £272.70. This was a goodly sum, and, at an average of £68.18 per parish, comparable to the London parishes studied by Ben Amos (2008: 89). In addition, the incorporated companies of Newcastle, or guilds, which, as in London, were transformed during the early modern period from trade bodies to fraternal organizations offering mutual support, provided another source of support for the poor and needy.

### III. North East Philanthropy in the Modern Era (1751 – 1950)

#### *Context*

In this, the age of industrialisation, the productive power of the British economy multiplied, and with it came urban growth on an unprecedented scale as population growth took off, creating social problems on a scale never before encountered, especially in London and the industrial towns of the North. The population of England is estimated to have risen from 5.8 million in 1750 to 8.7 million in 1800 and 16.7 million in 1850 (Hinde, 2003: 183). By 1850, Britain had become the most developed country in the world, with the highest level of output per head. A majority of people now lived in towns and agriculture contributed just a fifth of national income. Britain led the world in international

trade and, contrary to Malthus's prognosis, the population was not only growing but enjoying higher living standards (Broadberry et al., 2015: 371-401). In the early decades of industrial growth, the North East got off to a slow start, its population growing from 262,500 in 1761 to 332,000 in 1801, far behind Lancashire, Yorkshire, London and the Midlands (Wrigley, 2007: 54-55). This is attributed by Rowe (1990: 418-26) to the remoteness of the region and poor communications. Only the coal industry, in both Durham and Northumberland, really took full advantage of the buoyancy of the English economy with output climbing from 1.56 million tons in 1750 to 3.2 million tons in 1801, 5.2 million tons in 1826 and 15.4 million tons in 1854 (Pollard, 1980: 223). Because productivity barely increased, this led to a massive influx of workers into the industry and the towns and villages that sprung up around the pits (McCord, 1979: 36-42). Beginning in the 1820s, the North East began a remarkable transition from industrial laggard to industrial leader. As the national population rose to 30.1 million in 1901, County Durham outpaced the national average, rising from 150,000 in 1801 to 1.2 million in 1901, while Northumberland went 170,000 to 600,000 during the nineteenth century. Population growth was a direct consequence of industrial growth, spearheaded by coal mining, with 224,500 employees producing 56 million tons of coal in 1913 (Church, 1982: 305). It was, moreover, the colliery engineers who led the way in applying steam power to transportation, most famously George Stephenson (1781-1848), leading to Newcastle's early emergence as a centre of locomotive building. Shipping and shipbuilding likewise boomed. On the banks of the rivers Tyne and Wear, the North East pioneered the mass manufacture of iron ships, initially for the colliery trade. Other engineering industries, like the production of steam turbines for ships and electricity production, followed in quick succession, associated with legendary entrepreneurs like [Armstrong](#), [Palmer](#) and Parsons (Rowe, 1990: 426-30). Confidence soared within the tight-knit business community, centred on Newcastle, leading to massive investments in industries like iron and steel manufacturing, which saw Middlesbrough grow from a village in 1830 to major town with a population of 56,000 in 1881, driven by industrialists like [Isaac Lowthian Bell](#), [Henry Bolckow](#) and [Arthur Dorman](#) (McCord, 1979: 119-124). Before 1913, the North East is best described as an energetic industrial cluster, a hive of activity, serving markets across the world. The unwinding of the cluster and the ultimate demise of coal mining, shipbuilding, railway engineering, electrical engineering and iron and steel making could not then have been foretold. However, by 1950, the signs of irretrievable decline had become apparent, as other nations, spurred on during the two world wars, entered North East markets, mounting what proved to be an unstoppable challenge stemming from lower costs of production (McCord, 1979: 215-62). The rise and fall of the North East as an industrial powerhouse had lasted just 150 years (1825-1975), leaving behind a host of challenges that inevitably follow when the sources of well-paid employment for tens of thousands of people suddenly disappear.

### *Philanthropy*

The conditions existed in the North East during the modern era for philanthropy to make a big mark on society. On the one hand, there was evident need as rapid urbanisation led to overcrowding and unsanitary conditions, which got much worse when industrial growth really took off during the 1820s (McCord, 1979: 69-105). With central government not yet willing to assume full responsibility for health and welfare, it was philanthropy that provided many of the solutions to social ills (Finlayson, 1994: 19-106). On the other hand, industrial growth, led by mining but then extending into engineering, railway building, shipping, shipbuilding, iron and steel making, chemicals and banking, made many entrepreneurs wealthy, with the resources needed to invest in philanthropic projects (Warwick, 2016). These people were highly networked and politically active, drawing from their ranks the aldermen, mayors, sheriffs, lord lieutenants and members of parliament who governed the North East and served as power brokers between the North East and Westminster (Purdue, 2011: 110-18 and 198-220). They were socially connected and inter-married, sitting at the top of North East society, closely engaged in the social institutions that encompassed the second tier of worthies; the clergymen, doctors, lawyers, men of letters, administrators, and a plenitude of lesser business owners. Together, they constituted the philanthropic class of men and women of means who, as elsewhere in Britain,

took on the challenges stemming from rapid industrial, population and urban growth. As in previous eras, there were wealthy philanthropists who acted alone, but it increasingly became the norm to operate collectively through the formation of *charitable societies* funded by a long list of subscribers (Owen, 1965: 97-133). Under this arrangement, donations, while varying in size by capacity to give, reflective of the social hierarchy, were pooled to create and sustain entirely new institutions and organizations, leading Prochaska (1990: 357) to conclude that “No country on earth can lay claim to a greater philanthropic tradition than Great Britain.” What then was achieved in the North East during this great flowering of philanthropy?

- **Religion.** The enthusiasm of philanthropists for purely religious causes did not wane as a result of industrialization. Following the issue of the Act of Toleration in 1688, the number of Christian denominations increased and the Anglican Church lost its monopoly in doctrinal matters. As urbanisation progressed apace and new settlements were created across the great north coalfield, competition between faith communities escalated. Presbyterians, Baptists and Methodists built numerous new chapels through subscription. The Brunswick Place Wesleyan Methodist chapel in Newcastle, for example, opened in 1821 to accommodate 2,300 worshipers, cost £6,726 to build, of which “£1,323 was subscribed before the building had commenced” (MacKenzie, 1827:403). Primitive Methodism flourished in colliery towns like Hetton-le-Hole in County Durham where subscription and the support of the Hetton Colliery Co. built a chapel opened in 1858 accommodating 800 worshipers with a Sunday school for 600 children on a separate floor. Not to be outdone the Church of England responded by building 612 new churches in new parishes across England between 1818 and 1856 paid for on a 50-50 basis by government and public subscription (Port, 2006). More elaborate and beautifully adorned Anglican churches were built in the second half of the nineteenth and early twentieth centuries, typically with the support of wealthy philanthropists (Flew, 2015: 81-104; Harvey, Maclean & Press, 2011: 255). Examples include Christ Church, Felling (1866), funded by the proprietors of the Felling Chemical Works; the Church of St George, Jesmond, Newcastle (1887) funded by shipbuilder [Charles Mitchell](#); St Andrew’s Church, Sunderland (1907) built by shipbuilder [Sir John Priestman](#); and the Church of St James and St Basil, Fenham, Newcastle (1931), commissioned by shipping magnate [Sir James Knott](#) as a memorial to his two sons killed during World War I. The revival of the Catholic Church following the Catholic Relief Act of 1829, mass Irish immigration in the 1840s, and the re-establishment of Catholic diocese in England in 1850, brought about another wave of philanthropically assisted church formation. A good example is the Sacred Heart Church in North Gosforth, Newcastle, built for the Anglican Church in 1865 by [Thomas Eustace Smith](#). The church, having but a small congregation, was closed in 1900. In 1912, it was purchased for £3,000 by the Bishop of Hexham and Newcastle, [Richard Collins](#), and gifted to the Catholic Church.
- **Community Support.** The parochial based system of relieving the poor instituted in 1601 had begun in effect as a joint venture between ratepayers, wealthy patrons who left money in trust for the poor, and church congregations who held special services for the relief of the poor. Progressively, as the population grew and the number of paupers increased, the burden of support fell upon ratepayers. The total cost for the four parishes in Newcastle in 1815 was £15,185 (MacKenzie, 1827: 540). Outdoor relief was provided to out of work able-bodied people and each parish had a poorhouse catering for children, sick, aged and homeless, typically with about 140 people in residence. There was great variety in practice between parishes and the poor in Newcastle were likely better treated than many in England. Variations and corruption inspired central action and the introduction of the Poor Law Amendment Act of 1834, which led to the appointment of poor law commissioners, central regulations and the building of workhouses across the country, moving away from the old system of outdoor relief. This took some time to accomplish and variations in provision and efficiency lasted for

many decades. Eventually, well-constructed workhouses, with hospital wings, were provided across the country. This was the backbone of the new order, but, against this backdrop, numerous charitable and benefit societies were formed to ameliorate social conditions and avoid recourse to the workhouse. Benefit societies were not founded on philanthropy as such, but often involved better off people working to help themselves through mutual aid, paying into a common fund when employed and drawing benefits when not, or making provision for those left behind when deceased. Savings banks, such as that begun by [Archdeacon Charles Thorp](#) at Ryton in 1815 similarly encouraged the less well-off to accumulate resources that could be drawn on in times of need. Charitable societies funded by subscriptions also multiplied to serve particular causes in which women frequently took a leading role (Prochaska, 1980). The indefatigable [Theresa Merz \(1879-1958\)](#) is a prominent North East example. Merz was a leading light of the Charitable Organisation Society branch in Newcastle who helped form the Boys' Migration Society to prepare young adults for a better life in the Dominions. In Middlesbrough, the lead was taken by Lady Florence Bell, wife of [Sir Hugh Bell](#), in forming the temperance recreational society known as the Winter Garden. This was funded by subscription and offered activities and refreshments at very low prices in order to keep steelworkers out of public houses (Warwick, 2016: 201-06). Soup kitchens, clothing societies and indigent and sick societies all flourished, quite often in association with church and chapel communities. The Poor Children's Holiday Association in Newcastle, for example, was founded in 1891 by Methodists John Watson and John Lunn. Now known as [Children North East](#), the charity went on to open in 1906 the first tuberculosis sanatorium for children in England at Stannington. Orphanages likewise held great appeal for Victorian philanthropists, rescuing children from the street and imparting in them Christian family values. Dame Margaret's home at Washington established in 1886 by industrialist Sir Isaac Lowthian Bell for 130 children is exemplary. Not all charitable societies were intended to serve those at the bottom of the social hierarchy (Prochaska, 1990: 373-75). For example, the Society for the Sons of Clergy in the Diocese of Durham and Hexhamshire, begun on a subscription basis in 1709, was constituted "to relieve the distress often suffered by descendants of clergymen" supported the widows, sons and daughters of deceased clergymen, including the provision of fees for education. The fund for Widows of Protestant Dissenting Ministers, begun at Alnwick in 1764, served a similar purpose (MacKenzie, 1827: 552-555). More than a century later in 1868 the [Northern Ladies Annuity Society](#) was established by well-off women in the region to provide supplementary pensions for single ladies and widows of their own class with "an income of no more than £20 per annum."

- **Education.** The creation of endowed charity schools begun in the first half of the eighteenth century continued thereafter, but not sufficiently to keep pace with the growth in the population. In all, a further 76 charity schools were formed in Northumberland and County Durham between 1751 and 1800, of which 17 received crucial support from the charitable trust endowed by [Bishop Lord Nathaniel Crewe](#) following his death in 1721 (Cannon, 2016: vol. 2., 61-63 and 186-88). These schools added to the stock of 136 North East charity schools formed during the first half of the eighteenth century, making 212 foundations in total. Based on the 1819 national schools survey and the 1811 census of population, Cannon (2016: vol. 1, 100) has shown that both Durham and Northumberland ranked high, second and fifth respectively of 42 counties, in the league table of percentage of children attending school. Thereafter, as charity schools were taken over by other forms of provision, both counties slipped progressively down the league table, with Durham standing at 18<sup>th</sup> and Northumberland at 23<sup>rd</sup> in 1851. Church schools and private schools provided a limited education for the many before government finally accepted responsibility for elementary education following the passing of the Elementary Education Act in 1870. Neither in elementary or grammar schools, which increasingly relied on fee income to survive, was philanthropy any longer a major part of the funding equation. The Sunday Schools movement,

voluntary and funded primarily by church collections, took off after 1785 when the National Sunday School Society was founded. As early as 1822 the Sunday School Union claimed 4,459 schools, 55,547 teachers and 573,085 pupils. The first school in Newcastle was opened in 1784 by the [Reverend William Turner](#) at the Hanover square chapel, and by 1823 there were 106 schools, 1,907 teachers, and 11,584 pupils (MacKenzie, 1827: 459). Cannon (2016: vol. 1, 63) concludes that “there can be little doubt that Sunday schools made an important contribution in the struggle against literacy.”

- **Health.** Subscription philanthropy had its apogee in the establishment of modern hospitals, beginning as so often in London, and then spreading to leading provincial cities and towns. The ancient medical foundations of London – St Bartholomew’s, St Thomas’s and the Bethlehem hospital for treating special diseases – had been supplemented by the generous endowment of Guy’s hospital in 1724. The first hospital organized as a charitable association funded by subscription was the Westminster Hospital originating in 1719, followed by St George’s in 1733, the London Hospital in 1740 and the Middlesex Hospital in 1746 (Gray, 1905: 124-31). In the provinces, Bristol was an early adopter. Here the Bristol Royal Infirmary, founded in 1742, depended for its annual income on a combination of subscriptions, endowment income, legacies, donations and congregational collections (Gorsky, 1999: 238:42) Newcastle was also an early adopter. Its campaign in 1751 raised £5,000 to build and equip its new Infirmary at Forth Banks by diverse means, including a benefit “concert of vocal and instrumental music at the Assembly Room” arranged by [Charles Avison](#), “the performers having given their assistance gratis” (MacKenzie, 1827: 503). The Newcastle Infirmary progressively established itself as a centre for medical excellence and the foremost hospital in the region, regularly attracting philanthropic donations and legacies as it expanded the scale and scope of its work (Holden, Funnell & Oldroyd, 2009: 535). When rebuilt on its present site, opening in 1906, it became the Royal Victoria Infirmary (RVI) in honour of the late Queen. The principal donors were [William Watson-Armstrong](#), who had inherited the fortune of industrialist [William Armstrong](#), and industrialist John Hall, each contributing £100,000. A second major Newcastle initiative funded by subscription was the Dispensary, opened in 1778, which treated *en masse* infections, fevers and maladies like diarrhoea not treated at the Infirmary (Butler, 2012: 151-216). A Lying-in (maternity) hospital for poor married women was begun in 1760, the first such hospital outside London. The Lying-in hospital moved in 1826 to superior accommodation designed by John Dobson, again funded by subscription. A children’s hospital was begun in 1863 and moved into 1886 to a new hospital build by solicitor [John Fleming](#) at a cost of £25,000. In 1881, shipbuilder [Charles Mitchell](#) funded the building of Walkergate hospital. Outside Newcastle, dispensaries, infirmaries and hospitals funded by philanthropy are known to have been established at Bamburgh (1792), Sunderland (1794), Darlington (1808), Hexham (1815), Gateshead (1832), Durham (1853), Middlesbrough (1864), Jarrow (1871) and Monkwearmouth (1874). In 1948, 1,143 (43%) of the 2,688 hospitals bought under the umbrella of the National Health Service were voluntary foundations, the remainder municipal, typically workhouse hospitals of later vintage than voluntary sector hospitals, which had paved the way for the creation of a truly national system of healthcare provision.
- **Higher Education.** The founding and growth of three of the North East’s present universities – Durham, Newcastle and Teesside – owe much to philanthropy. Durham was founded in 1832 by [Charles Thorp \(1783-1862\)](#), Archdeacon of Durham, and [William Van Mildert \(1765-1836\)](#), the last Palatine Bishop of Durham. This, in effect, was the philanthropic swansong of the palatinate bishops of Durham, who were on the point of losing control of their resources to a centralizing church. Van Mildert made over a collection of buildings on Palace Green for the use of the university. A royal charter issued in 1837. To pay for the salaries of professors Van Mildert transferred four of the 12 prebends (rich livings for members of the cathedral chapter) for this purpose. He personally donated £2,000 a year before his death in 1836. Charles Thorp

became the first Warden of the University (Whiting, 1932). Philanthropists have since helped [Durham](#) become a world-leading university. Notable donations include an early gift of £9,000 from Hannah Brackenbury to fund a professorship, a large gift from Douglas Horsfall to help found St Chad's college in 1904, and another large gift from [Dora Cruddas](#) of Haughton Castle in Northumberland to help found St John's Hall in 1909. [Newcastle University](#), which until 1963 was a division of Durham University, traces its origins to the formation of the Newcastle Medical School in 1834 (Turner & Arnison, 1934) and the Newcastle College of Physical Sciences in 1871. Both colleges began as charitable societies funded by subscription, and in time both became major beneficiaries of large gifts from private individuals to fund expansion. Notable amongst these are the £10,000 bequeathed in 1892 by [Professor George Yeoman Heath](#) to fund a new wing for the Medical School; £10,000 given in 1911 by [John Bell Simpson](#) to construct the King Edward VII building for the School of Art; £15,000 bequeathed by [Emily Matilda Easton](#) in 1913 to pay off a mortgage and fund a residence for 40 female students; the gift of a 20 acre sports ground in Heaton by [Sir Cecil Cochran](#) who also built the Students' Union in 1925; £212,000 given between 1931 and 1936 by [Sir Arthur Sutherland](#) to construct first-class facilities for the dental and medical schools (Bettenson, 1971). [Teesside University](#) grew out of Constantine Technical College opened in 1930 in Middlesbrough. The College was the brainchild of shipping magnate [Joseph Constantine \(1856-1922\)](#) who gave £40,000 in 1916 to make his vision of a place of higher learning on Teesside possible. After frustrating delays, construction began in 1927, the initial fund boosted by a further gift of £40,000 from the Constantine family. Today, the universities of Durham, Newcastle and Teesside combined have an annual income of £984.1 million, employ 12,492 people, and have a student population of 62,963.

- **Policy and Public Opinion.** The involvement of philanthropy in political lobbying began in the modern era. Underpinning the formation of philanthropically funded campaigning organizations is the idea that a relatively small amount of money might have a major impact on the course of social change. Both religious and secular campaigning organizations fall within this category. Religious organizations were spurred on by the evangelical revival of the nineteenth century, with local branches subscribing to nationally orchestrated causes such as the Society for the Propagation of the Gospel, the Church Missionary Society, the Baptist Missionary Society, the London Missionary Society, the Wesleyan Missionary Society, and the British and Foreign Bible Society (Owen, 1965: 125). The anti-slavery movement orchestrated by the Committee for the Abolition of the Slave Trade, founded in 1787, was composed of men and women of similar ilk, principally Church of England evangelicals and Quakers. Its first success came with the passing of the Abolition of the Slave Trade Act of 1807. Granville Sharp of Durham was one of the leading players in the agitation, as was the [Reverend William Turner](#) of Newcastle (Harbottle, 1997). Its second success came in 1833 with the passing of the Slavery Abolition Act following the campaign led by the Anti-Slavery Society, founded in 1823, to which local associations like that in Newcastle contributed much (Owen, 1965: 132). The Women's Social and Political Union – the suffragettes, founded in 1903, similarly depended on a combination of national organization and local activism of women like Newcastle's [Theresa Merz](#).
- **Environment and Animals.** One of the most lasting achievements of philanthropy in the modern era is the provision of parks and gardens for ordinary people who during the nineteenth century lived and worked most often in cramped and unsanitary conditions. Those who gave land and provided the money to lay out gardens, create playing fields, excavate lakes, install paths, bandstands and a host of other features did so in the straightforward belief that hard working people needed easy access to fresh air and open spaces. It was in laying out parks and gardens for the public benefit that local authorities and industrialists cooperated most fully. In the North East, the People's Park in Sunderland, begun in 1854, now known as

Mowbray Park, was a municipal initiative as was Leazes Park in Newcastle, opened in 1873. With the local authorities primed to accept responsibility for maintenance costs, gifts from private estate owners increased in number. It was on this understanding that [Henry Bolckow](#) gave the 72-acre Albert Park to Middlesbrough and that [William](#) and [Margaret Armstrong](#) gave Armstrong Park in 1883 and the beautifully landscaped Jesmond Dene in 1884 to the City of Newcastle. Elswick Park was given to Newcastle in 1881 by four local worthies: [Sir W.H. Stephenson](#), [Thomas Hodgkin](#), [Joseph Cowen](#) and Thomas Forster. Thomas Hodgkin (1831-1913), the famous historian and banker, also gave his mansion and estate, Benwell House, to the city in 1890, which was then named Hodgkin Park in his honour. The various parks in the centre of Hexham, including the Sele, which was made publically accessible as early as 1753, were donated to the district council in 1908 by Lord Allendale. The same tale can be told elsewhere, reflecting a growing sensibility in Victorian Britain to what are now regarded as environmental concerns. This is evidenced by the large membership of the Northumberland Natural History Society founded in 1829, which in 1884 opened the Hancock Museum, built by public subscription, to house its growing collection of specimens and artefacts. Earlier, sometime in the 1840s, [Charles Thorp \(1783-1862\)](#) acquired the tenancy of the Farne Islands, buying them outright in 1861, and employing a wildlife warden to protect threatened bird species. The idea of wildlife conservation was decades ahead of its time. In 1925, Thorp's family donated the islands to the National Trust.

- Arts, culture and heritage.** The growing scale and scope of local government in Victorian and Edwardian Britain, allied to a growing belief in municipal improvement, led to further cooperation between philanthropists and government in the field of arts, culture and heritage. Again, the standard formula most often applied was for philanthropists to meet capital costs and the ratepayer to meet running costs. This was the basis on which [Andrew Carnegie](#) donated public libraries across the United States and Britain, of which, in the North East, Hartlepool (1903), Thornaby on Tees (1903), Bolden (1904), Anfield Plain in Durham (1908), Sunderland (1909), Benwell in Newcastle (1909), Middlesbrough (1912) and Gateshead (1916) were beneficiaries (Harvey et.al, 2011). Local philanthropists were also active in library provision. In Newcastle, colliery-owner and four-time mayor [William Haswell Stephenson \(1836-1918\)](#), gave the Stephenson Library in Elswick (1895) and the Lady Stephenson Library in Newcastle (1908). In Darlington, [Edward Pease](#), a member of the famous Quaker family of bankers and industrialists, gave the Crown Street Library in 1885. Philanthropy and local government joined forces too in the provision of art galleries and museums. The Hancock Museum (1884) in Newcastle, now known as the Great North Museum, Hancock, was paid for by public subscription but with large lead gifts from Lord and Lady Armstrong, who donated £11,500 and £4,000 respectively, toward the total cost of £40,000. The Laing Art Gallery in Newcastle (1904) famously was built, at a cost of £30,000, by wine and spirits merchant [Alexander Laing \(1828-1905\)](#), without pictures in the expectation that other donors would soon donate the necessary works of art. Laing proved correct as the existence of the gallery induced other people of means to become philanthropic by contributing individual works or entire collections. Solicitor [Joseph Shipley \(1822-1909\)](#), on the other hand, left both £30,000 and 2,000 artworks to found the Shipley Art Gallery in Gateshead, opened in 1917. In Middlesbrough, [Sir Arthur Dorman](#) donated the Dorman Memorial Museum in 1904 in memory of his son who had been killed during the Boer War. The only major exception in the North East to the standard model of making over ownership of a museum or gallery to the local authority is the remarkable [Bowes Museum](#) in Bernard Castle founded by [John Bowes \(1811-1885\)](#) and his wife Josephine (1825-1874). John was co-heir with his younger brother to the colliery fortune made by his great-grandfather, Sir George Bowes (1701-1760), owner of the Gibside Estate in the Derwent Valley (Lomas, 2009: 59-64). John met Josephine in Paris and married in 1852. In the 1860s the couple returned to England and, having no children, began their life work, collecting fine and decorative art on a

monumental scale. Construction of the museum began in 1868 but was not completed until 1892. The building itself was, and still is, out of keeping with the small provincial northern town where it sits. The building is a prime example of Georgian architecture and, equally, inside it is home to a multitude of historically significant objects. Between 1862 and 1874, John and Josephine purchased 15,000 objects for the museum and today it houses internationally significant works of art including paintings by Goya and Canaletto. On his death, Bowes left the vast majority of his estate in trust to the museum.

#### *IV. North East Philanthropy in the Contemporary Era (1950 – present)*

##### *Context*

The seeds of misfortune of the industrial economy of the North East were sown well before the crises and eventual collapse of the shipbuilding, iron and steel and coal industries in relatively recent times. The years between 1914 and 1950, covering two world wars, the miner's strike of 1926, and the great depression of 1929-33, were highly disturbed. The effects were compounded by the high level of economic dependency of the North East on a handful of heavy industries and by rising protectionism abroad. Markets were lost and industry in the North East lost ground to rivals overseas (Broadberry, 1997: 1-16). One of the most abiding images of interwar Britain is that of the Jarrow marchers heading for Westminster appealing for jobs. The Second World War boosted demand artificially, disguising problems, and, as other economies in Europe also struggled to recover after 1945, the underlying structural difficulties of the North East economy did not become apparent until after 1960 (McCord, 1979: Rowe, 1990). In shipbuilding, Japan emerged as a major competitor, with high levels of productivity, high quality, and able to offer lower prices. Orders dried up and from the 1960s shipyard closures became a regular occurrence on both the rivers Tyne and Wear. The last Wearside yards closed in 1988 and although Swan Hunter staggered on in Wallsend until 2006 it was, in reality, a slow and painful ending. In coal mining, as elsewhere in Britain, poor labour relations compounded problems arising from loss of overseas markets and cheap foreign imports. The catastrophic miner's strike of 1984-85 made matters worse. Pit closures continued apace and in 1994 deep mining ended in County Durham with the closure of Wearmouth Colliery in Sunderland. In iron and steel making, Teesside lost its preeminent position during the 1950s and 1960s and from a peak of 91 blast furnaces in operation had shrunk to just one at Redcar by 1979. The upshot of industrial decline was the loss of tens of thousands of jobs and the devastation of single employer dependent communities following closure. There have been compensating developments such as Nissan in car manufacturing at Sunderland since 1984. The plant has enjoyed a strong record of productivity and has succeeded in attracting new models built for the European market, and in 2016 produced more than 500,000 vehicles with a workforce of 4,500 employees. However, the legacy of industrial decline has cast a long shadow. Recent figures from the Office of National Statistics reveals the North East, with a population of 2.6 million, to have a gross value added per head of £19,218 compared to an average for England of £27,108 (Harari & Ward, 2018). Between 2010 and 2016, the regional economy grew at an annual average rate of 0.7% compared to an average for England of 2.1%. Weekly earnings in 2017 averaged £504 compared to £550 nationally. In the same year, the number of businesses in the region fell by 2.7% compared to a national increase of 3.6%. The percentage of people in employment in 2017 was the second lowest of all UK regions. Adding to this picture, the economic disadvantages of the region have their counterpart in the social realm. The health of people across the North East typically is worse than the average for England, more children are classified as obese and there is a higher incidence of alcohol-related harm. The effect is compounded, moreover, because those on higher incomes do not suffer the consequences of poor diets and problematic lifestyles. Health inequalities are, therefore, more extreme than elsewhere in England. In Newcastle, for example, life expectancy is 12.9 years lower for men and 10.4 years lower for women in the most deprived areas than in the least deprived areas (Public Health England, 2018). The same situation prevails in education

where “the ‘early years gap’ between children from poorer and wealthier homes is almost twice as large in the North as it is in London” (Clifton, Round & Raikes, 2016: 4).

### *Philanthropy*

Philanthropy was not swept away by the construction of the welfare state in Britain in the years immediately following the Second World War, but it was fundamentally altered and repurposed. In assuming primary responsibility for health, education and social security, many of the long-standing roles and rationales for philanthropy seemingly disappeared. Moreover, with the welfare state came higher levels of taxation, the better off sections of society now paying compulsorily for what they had once contributed voluntarily, reducing both the incentive and ability to give. The ideological climate too had swung against philanthropy and voluntarism. Senior government ministers like Aneurin Bevan, widely applauded for the introduction of the National Health Service in 1948, openly expressed their distaste for philanthropy as symbolic violence inflicted by the rich upon the poor. This was not a view shared by everyone and when the Nathan Committee, established by parliament to look at the role of voluntary organizations and charitable trusts, reported in 1952, the thrust of the recommendations was toward partnership working through grant-aid and agency working rather than wholesale takeover of services by the state, explicitly rejecting “the transfer of private charitable resources to state agencies” (Owen, 1965: 543). Under the new consensual vision that began to emerge, large charitable trusts like the Nuffield Foundation and the Wellcome Trust might as independent bodies serve as auxiliaries to the welfare state, assuming responsibility for research, critical analysis and policy advice. The Charities Act that followed in 1960 revamped the Charity Commission and incorporated the principle asserted by the Nathan Committee of “voluntary action as an integral part of the machinery of the welfare state” (Owen, 1965: 595). In other words, the state and voluntary sector should be seen as complementary and co-existent, the voluntary sector lending a flexibility and responsiveness to welfare provision that the state alone could not achieve (Davies, 2015: 68-70). What then has transpired? And what has it meant for the North East?

- ***The need for philanthropy.*** The advent of the welfare state emphatically did not end the need for philanthropy as a means of social support and as a mechanism for social progress. In health, education and social welfare, the state has substantially met the responsibilities it assumed between 1945 and 1950. It has, however, found it increasingly difficult to meet specific and particular needs, nationally and locally, because of increasing demand, diversity of needs, and resource constraints. Nowhere in Britain is this more in evidence than in the North East, where the challenges of poverty, poor health and educational under-attainment are in plain view. In a world of high and rising inequalities in income and wealth, in which many private individuals have the means to help, the potential contribution of philanthropy to society is very substantial, much greater than presently realized (Piketty, 2014).
- ***Philanthropists, trusts and foundations.*** Philanthropic giving at any time is the sum of income derived from past benefactions and gifts made in the present for immediate spending on designated charitable purposes. Many charitable organizations have accumulated endowment funds whereby the past helps the organization achieve its charitable purpose in the present. Other accumulations of past benefactions exist in grant-making trusts and foundations, the income from which is used to make grants to front-line operating charities. In the North East, there are presently 33 grant-making trusts and foundation that make grants in excess of £100,000 per annum. Together, they have endowment funds valued at £515.5 million and made grants in the previous financial year of £50.6 million. The oldest of these, [Lord Crewe’s Charity \(1721\)](#) and the Shaftoe Charities (1685), were founded in the early modern period. A further two, the [Northern Ladies Annuity Society \(1868\)](#) and the [Sir John Priestman Charity Trust \(1931\)](#) have their roots in the modern period, but 29 are recent foundations. Their mission statements reveal a deep affection for the North East and an understanding of the problems of disadvantage the region faces. The majority of them were

founded by individual philanthropists or philanthropic couples to give back something to the region that had supported their lives and careers. The exception was the Northern Rock Foundation, which for a number of years before the financial crash of 2008, when its income was tied to the swelling profits of the Northern Rock Bank, was one of the largest grant-making foundations in Britain (Robinson, 2016). Some – notably the three community foundations covering Tyne & Wear and Northumberland, [County Durham](#) and [Tees Valley](#) – are collective, pooled philanthropies, whereby many donors establish funds that are drawn upon variously to make grants to front-line charities. [The Community Foundation Tyne & Wear and Northumberland](#), with an endowment of £78.7 million and making grants of £6.8 million in the 2016/17 financial year, is the largest foundation of its type in Britain. All in all, the data speaks of philanthropy flourishing in the North East, helping combat the many challenges faced by the region in the present era.

- ***Beneficiaries of philanthropy.*** Philanthropy helps improve the lives of tens of thousands of people across the North East. It does so through the many hundreds of charitable organizations that it supports. The vast majority of these organizations are small, with a few employees, and providing specialist community services on a local basis. Then there is a substantial group of middling-sized charities, often with tens of employees and large numbers of volunteers, spread across the full range of third sector charitable causes. At the top of the list is a minority of large social purpose organizations that employ hundreds of people in fields such as health, education and higher education. By and large, the smaller the organization, the greater its dependence on philanthropic income (Chapman & Hunter, 2017). However, it is the largest organizations, notably the universities of Newcastle and Durham, which have the largest philanthropic incomes in absolute terms, with £35.2 million and £19.5 million respectively in the 2016/17 financial year. This is because large, prestigious research-intensive universities have substantial income from endowments, legacies, donations and grants from well-endowed national foundations like the Wellcome Trust to fund research. Large organizations like universities, hospitals and cultural institutions operate in mixed funding environments with money coming predominantly from earned income and government grants and/or contracts. Philanthropic income in these organizations funds activities that are out of the ordinary or at the cutting edge, such as scholarships for students, equipment to treat patients or performances by new artists. It enables them to take risks and invest in new things that deliver progress. Medium-sized organizations like hospices, wildlife trusts, homelessness and disability charities have much higher shares of philanthropic income but still operate mixed funding models, winning contracts with government agencies and/or charging for some services. Smaller and newer charities that deal with difficult social issues like drug addiction or the integration of refugees into communities often depend to a higher degree on philanthropic income, as do the hundreds of community groups run largely by volunteers. There are, of course, exceptions in all size categories. Most religious organizations, for example, large or small, are sustained mainly by philanthropic income from collections, individual donations, legacies, endowments and grant from trusts and foundations.

## Top 10 Main Research Findings

In examining the history of philanthropy in the North East over more than 900 years, we have come across a wealth of fascinating facts and inspirational stories, related in the 232 profiles of philanthropists, beneficiaries, trusts and foundations we have published to date. What ultimately is most important, however, is not subjective opinions about individual philanthropists or philanthropic ventures, but the substantive conclusions that have emerged from the research. These are tenfold.

- 1. *The North East has a long and rich history of philanthropy.*** It is remarkable that philanthropic initiatives taken during the first centuries following the Norman Conquest are still bearing fruit today. Two ancient 'hospitals', Sherburn House near Durham, founded in 1181 by [Bishop Hugh du Puiset](#), and the Hospital of God at Greatham, founded in 1273 by [Bishop Robert de Stithell](#), continue today as providers of accommodation for the elderly. [St Mary Magdalene and Holy Jesus Trust](#) almshouse charity in Newcastle similarly dates back to the twelfth century. Many other less well-endowed religious foundations, like the *Maison Dieu* in Newcastle, founded by [Roger Thornton](#) in 1412, have long since disappeared, along with the numerous monasteries, nunneries and friaries that were swept away during the dissolutions of 1537-40 ordered by Henry VIII (McCord & Thompson, 1998: 107-09). Traces remain in occasional architectural gems like the twelfth century Brinkburn Priory Church in Northumberland, built and endowed [by Sir William Bertram II \(1157-1206\)](#), and in place names and a few surviving re-purposed buildings such as 'Blackfriars' in Newcastle. Many more ancient churches have survived, often extended and adorned by later philanthropic gifts, as at St Michael and All Saints, Felton, where in 1331 [Sir Roger Mauduit](#) constructed the Lady Chapel. Sir Roger endowed a *chantry* at the same time, a dedicated trust for the support of a priest who in return was obligated to say prayers for the founder and other named individuals. Chantries were a standard form of philanthropy before their abolition by Henry VIII. Of the 42 in existence in Northumberland in 1537 (Lomas, 1996: 112-13), 27 were in Newcastle, 11 at the parish church of St Nicholas (founded c. 1091); the others at the nearby chapels of All Saints (founded c.1286), St Andrew (founded c.1218) and St John (founded c.1287). Thereafter, it became common for the wealthy to leave legacies for the poor as their chosen route to redemption.
- 2. *There are three distinctive aspects to philanthropy in the North East.*** In many respects, the objects and trajectory of philanthropy in the North East have been broadly similar to those prevailing in other parts of England. In the early modern era (1501-1750), secular causes such as education gained ground over religious causes (Jordan, 2013 [1959]), and in the modern era (1751-1950) the trend continued as hospitals, infirmaries and dispensaries moved centre stage, often funded on a subscription basis by many people, not the few (Owen, 1965). Philanthropy came of age amid the industrial boom that transformed the North East from a rural to a predominantly urban society. Voluntary initiatives flourished in social welfare provision, religion, parks and gardens, art galleries, museums and higher education, before the full development of the welfare state after 1950 (Prochaska, 1988). Since then philanthropy has been reinvented (a) as a source of 'over and above' support for establishment causes like the arts and higher education, and (b) as sponsor of innovative frontline charities tackling a swathe of economic, social, cultural and political problems (Davis, 2015). What, then, stands out as distinctive in the history of philanthropy in the North East of England? The answer comes in three parts. First, it is evident that the Palatine Bishops of Durham had more wealth and power than their counterparts elsewhere in England, which explains the continued existence of charities like Sherburn House (1191), the Hospital of God at Greatham (1273) and [Lord Crewe's Charity \(1721\)](#), and the establishment of Durham School (1414) and the [University of Durham \(1832\)](#) as religious foundations (Lomas, 1992; Whiting, 1932, 1940). Second, there were important consequences for philanthropy of the concentration of economic power in the hands of the business elite of Newcastle that held sway

over the region from the later medieval period down to the mid-twentieth century. Newcastle became a hub for philanthropy because it was the place where merchants, bankers, coal owners and industrialists conducted their business and dominated civic life through occupancy of political office, while maintaining social ties through intermarriage and membership of social and religious groups. Elite cohesion created a sense of common purpose and the capacity to mobilise in support of philanthropic initiatives, often in advance of other towns and cities (Purdue, 2011: 103-173). The Newcastle Infirmary (1751), the Lying-in Hospital for Poor Married Women (1760), and the College of Physical Sciences (1871) are exemplary. Third, the speed of de-industrialization in the contemporary era has given rise to economic and social problems in the North East that are more severe than in other parts of Britain (McCord, 1979: 215-41). Yet, there remains a strong sense of place and identity, carried over from the prior era, which has inspired various creative philanthropic responses to the challenges of social renewal (Feldman & Graddy-Reed, 2014). Outstanding amongst these are the emergence of the [Community Foundation Tyne & Wear and Northumberland](#) as the largest organization of its type in Britain; the actions of [John Elliott](#) in giving over his company, Ebac, to a philanthropic trust; and the commitment of [Jonathan Ruffer](#) to the economic regeneration of Bishop Auckland through high impact philanthropy.

3. ***Enterprise is the motor force of philanthropy.*** It is a stand out fact that once the simple equation between wealth and landowning was broken, and fortunes came to be made in trade, mining, manufacturing and services, then the philanthropic crown passed from the landowning to the entrepreneurial class (Casson & Casson, 2013). Across six centuries, it has been those who have made money for themselves, together with their spouses and immediate descendants, who have contributed most freely to charitable causes. In the medieval period, the generosity of Newcastle merchant Roger Thornton (d. 1430) was legendary. In the early modern period, the endowment of famous Newcastle schools by merchant [Thomas Horsley](#), in 1545, and the widow of a tobacco merchant, [Dame Eleanor Allan](#), in 1704, are exemplary. In the industrial age, the careers of ironmaster Henry Bolckow (1806-1879), engineering titan Lord William Armstrong (1810-1900), shipbuilder [Sir Charles Palmer \(1822-1907\)](#) and shipping magnate Joseph Constantine (1856-1922) confirm the long-standing connection between entrepreneurship and philanthropy. Notable counterparts in the contemporary period include housebuilder [Sir William Leech \(1900-1990\)](#), household products manufacturer [Wilfred Handley \(1901-1982\)](#), innovative engineering company founders [Reginald Mann \(1898-1991\)](#) and [Alan Reece \(1927-2012\)](#), and fashion brand chief [Dame Margaret Barber \(b. 1940\)](#).
4. ***Philanthropy is a major source of social innovation.*** One of the primary strengths of philanthropy is getting new things off the ground, setting the ball rolling (Maclean, Harvey & Gordon, 2013). This can be seen in the pattern of schools formation across the North East where 17 grammar schools offering a classical education were endowed in the fifteenth, sixteenth and seventeenth centuries, followed by large numbers of non-classical charity schools in the late seventeenth and early eighteenth centuries, before being superseded by fee-paying and state schools (Cannon, 2016). Many hospitals and three of the region's five universities likewise have their roots deep in philanthropy, as do several prominent art galleries and museums, and most of the region's hospices.
5. ***Social activism is essential to the success of philanthropic ventures.*** Philanthropy achieves most when directed by practical initiatives to change the world for the better, what we call *social activism* (Gray, 1905: 171-203). At times, philanthropist and social activist may be one in the same person, but at other times they are not. The Quaker solicitor [Robert Spence Watson \(1837-1911\)](#), for example, played a key role in the founding of the College of Physical Sciences in Newcastle in 1871, not as a philanthropist but as a social activist. The same is true of his friend and fellow Quaker, electrical engineer [Theodore Merz \(1840-1921\)](#), whose remarkable daughter, [Theresa Merz \(1878-1958\)](#), combined her life as a social activist, including fighting for women's rights as a suffragette, with philanthropy, using her fortune to found a home for unmarried mothers in 1935.

6. ***Philanthropy is not just about mega-donors.*** We are attuned nowadays to thinking of philanthropy in terms of big donors, but in the eighteenth and nineteenth centuries many charities were funded by subscribers who gave what they could afford and what felt appropriate (Owen, 1965: 91-210). Numerous Sunday schools, built adjacent to chapels and churches, were funded in this way, as were many hospitals, infirmaries, dispensaries and day schools. Even major institutions, like [Newcastle University](#), originated in this way. The recently established [Middlesbrough and Teesside Philanthropic Foundation](#), which currently lists 50 patrons, is a modern day example of subscription philanthropy in action. Crowdfunding of philanthropic initiatives is based on a similar principle.
7. ***Prestigious institutions are magnets for philanthropy.*** Not all charitable organizations have the same appeal. Museums and art galleries, for example, often build up their collections incrementally, serving as a locus for in-kind philanthropy, as private individuals donate specimens, works of art or entire collections (Ostrower, 1995). The Great North Museum thus owes its present distinction to many hundreds of donors, as does the Laing Art Gallery. Leading universities like Durham and Newcastle are especially magnetic because they attract donations from many individuals, trusts and foundations in support of a wide variety of causes, and hence enjoy the highest philanthropic incomes in the region.
8. ***Institutions founded on philanthropy must adapt to survive.*** In exceptional circumstances, the resources gifted to charitable organizations by founders prove sufficient to sustain them for hundreds of years, as at Sherburn House and the Hospital of God at Greatham. Normally, however, longevity is dependent on finding fresh sources of income, and this, in turn, requires adapting to changing times and circumstances. The tendency is for philanthropic income as a proportion of total income to decline over time. Research-intensive universities like Newcastle and Durham, for example, while having large philanthropic incomes in absolute terms, secure most of their operating income from student fees, trading activities, funding councils, and research grants and contracts. Philanthropic income, however, remains vitally important to the funding of capital projects, cutting-edge research, and student bursaries. Large numbers of other charities, likewise, have migrated over time to mixed funding models by winning contracts from government bodies, trading and charging for services. Famous old independent schools like Newcastle Royal Grammar, Dame Allan's, Durham School and Barnard Castle School began as philanthropic foundations, but nowadays depend almost entirely on income from fees to sustain themselves. In general, smaller and newer charities are more dependent on philanthropic income than larger and more established charities, consistent with the notion that philanthropy often does its best work at the front line, taking on challenges spurned by the establishment (Chapman & Hunter, 2017).
9. ***Philanthropy is a two-way street.*** On the basis of our interviews and historical research, we conclude that being philanthropic is a source of intense satisfaction for the philanthropist. Doing good, caring for others, for present and future generations, engenders a fresh sense of purpose and a more positive social identity, legitimating the possession of wealth (Maclean, Harvey & Chia, 2012). When good results follow and are experienced at first hand, the satisfactions of generosity are intensified, and life for the philanthropist becomes especially satisfying (Carnegie, 1889). So powerful and rewarding are such satisfactions that they enable the philanthropist to achieve a new level of self-fulfilment, which may not have been experienced prior to becoming philanthropic (Maclean, Harvey, Gordon & Shaw, 2015). Awards for philanthropy such as state honours, prizes and honorary degrees, is icing on the feel-good cake (Shaw, Gordon, Harvey & Maclean, 2011).
10. ***Philanthropy in the past lives on in the present.*** Endowed funds, whether held by operating charities or trusts and foundations, hold a special place within philanthropy, linking generosity in the past with charitable causes in the present. Outstanding North East philanthropists like Nathaniel Crewe (1633-1721) and William Leech (1900-1990) sought and succeeded in exercising a duty of care not just for their own generation, but for generations to come. In his "message to

the future”, William Leech expressed his intention that his endowment should “provide a secure and ever increasing income for the benefit of mankind” (NRO 3758, 1985). The same noble sentiment has inspired the endowment gifts made by many North East philanthropists, past and present, which with careful stewardship will continue to serve the region well into the future.

## Conclusion: Philanthropy – Past, Present and Future

In the preface to his *History of English Philanthropy, 1540 – 1800* (1905), Gray raises a series of questions which are as relevant now as when he was writing over a century ago: What are the meaning and worth of philanthropy? What, at different times, has philanthropy regarded as its proper task? To what degree to date has philanthropy satisfied its intentions? What, based on our understanding of the past, is the future of philanthropy? Gray, wisely, strictly limited the period of his study to avoid having to compare and contrast motives and means across different historical eras in which the religious, economic, social and political contexts varied markedly. We, arguably less wisely, have followed the rockier road of studying philanthropy in a geographically well-defined region over more than nine centuries. Our justification is that studying a phenomenon like philanthropy in the *longue durée* is valuable precisely because it helps reveal temporal similarities and differences and hence the logic of important structural changes. We take each of Gray’s four questions in turn.

### *What is the meaning and worth of philanthropy?*

Philanthropy across our four historical eras arose as a response to tangible social problems, understood as problems by both benefactors and beneficiaries, notwithstanding asymmetries of power and position. This is a bold claim that is unlikely to find favour with critics with a subjective or rational utilitarian dislike for particular philanthropic causes (Singer, 2009; 2015). Support for religion, for example, is often held to be less worthy than giving to relieve hunger or ill-health. This, we suggest, is to miss the point that perceptions of need invariably are subjective and contested. Providing and adorning churches and priests in medieval times was accorded a high priority because both lords and parishioners saw value in the enterprise. The church represented something more than an instrument of domination and, religion, more than the opium of the people. This said, it cannot be denied that philanthropy exists now and has always existed because of the persistence of economic and social inequalities, which, if left unchecked, have the tendency to reproduce and accumulate (Callahan, 2017; Picketty, 2014). In our view, therefore, the meaning and worth of philanthropy lie in its *honest struggle to mitigate the adverse consequences of endemic economic and social inequalities*.

### *What, at different times, has philanthropy regarded as its proper task?*

To answer this question, looking over the accumulated evidence of nine centuries, it is important first to make clear the distinction between *philanthropic intentions* and *philanthropic motives* because *intentions* are more obvious, stable and universal than motives. In the context of philanthropy, we refer to intentions as *goals intended to improve the lives of beneficiaries*. This is not to say that philanthropy does not bring rewards and satisfactions to benefactors, which we find unequivocally that it does, but it allows us to focus on the question asked by Gray: *what, at different times, has philanthropy regarded as its proper task?* Our answer is summarised in Table 1.

**Table 1: Philanthropic Domains, Intentions, Solutions and Eras**

<b>Philanthropic Domain</b>	<b>Universal Philanthropic Intentions</b>	<b>Philanthropic Solutions</b>	<b>Era Begun (North East)</b>
Religion	To help propagate ideas and beliefs that help people live morally upright lives.	Provision of priests and places of worship (churches, chapels, synagogues, mosques), Religious houses (monks, nuns, friars), Bible societies, Missionary societies.	Medieval
Community Service	To help improve the lives of the most vulnerable people in society.	Almsgiving, Hospitals and almshouses. Ales, Roads and bridges, Municipal buildings and facilities, Poor relief, Poorhouses and workhouses, Soup kitchens, Orphanages, Shelters, homes and refuges, Charitable societies, Third sector operating charities (children, youth, elderly, disabled, disadvantaged). Community groups, Foodbanks.	Medieval
Education	To help people acquire the knowledge needed to achieve their potential.	Grammar schools, Charity schools, Sunday Schools, Learned societies, Professional Institutes.	Medieval
Health	To help look after, cure or relieve the suffering of the sick, injured, infirmed or in-gestation?	Hospitals, Dispensaries, Lying-in hospitals/maternity homes, Children's hospitals, Asylums, Sanatoriums.	Modern
Higher Education	To help create, apply and spread new knowledge and understanding?	Universities, Colleges, Research institutes, centres and units within and outside universities and colleges.	Modern
Public Policy and Opinion	To help bring an end to social injustices?	Reform movements, Policy think tanks, Advocacy groups and organizations.	Modern
Environment and Animals	To help conserve the natural world?	Animal welfare societies, Parks and gardens, National Trust, Wildlife Trusts. Environmental charities.	Modern
Arts, Culture and Heritage	To help promote and preserve the creative arts and heritage?	Public Libraries, Museums, Art galleries, Theatres, Concert halls.	Modern
Enterprise, Skills and Economic Development	To help people, communities and societies take charge of their own destiny?	Enterprise support, Skills training, International aid and economic development.	Contemporary

What Table 1 demonstrates is threefold. First, it is evident that ever since medieval times, philanthropy has had a big agenda impacting on society in multiple ways. Second, the number of domains impacted by philanthropy has tended to multiply with time, most especially in the two

centuries between 1750 and 1950. Third, within philanthropic domains, while intentions do not fundamentally change, favoured solutions are more prone to change in response to changes in economic, social and political contexts.

### *To what degree to date has philanthropy satisfied its intentions?*

That philanthropy has been at the root of many noble causes is beyond dispute. Many of the institutions we take for granted today were begun on a voluntary basis and funded by private means: for example, in education, health, higher education, parks and gardens, animal welfare, museums and art galleries. The North East would be a much poorer place today without initiatives taken and sustained by philanthropists over many centuries. Equally, it is true that either the state or the private sector have often taken over what philanthropy started. The lesson is that philanthropy often plays a catalytic role in the process of social innovation, implementing and institutionalizing change before other actors feel compelled to act. Philanthropy, in this way, certainly has satisfied its intentions.

### *What, based on our understanding of the past, is the future of philanthropy?*

Philanthropy, by enduring and changing over centuries, has proved itself to be a robust and highly valued social institution with a critical role to play in confronting the most difficult challenges facing mankind, locally, regionally, nationally and internationally. Indeed, there is now more than ever the necessity for philanthropists to step up to the plate to research, test and implement solutions to problems of poverty, injustice, ill-health and environmental degradation. Never before in history has so much wealth been so concentrated in the hands of so few (Piketty, 2014). Philanthropy offers the best means possible for people of means to be a major part of the solution to current ills, just as in the past it spearheaded the fight against poverty, illiteracy and ill-health in North East England.

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