

Philanthropie Aktuell

EDITORIAL

Center for Philanthropy Studies (CEPS), University of Basel
Steinengraben 22, CH-4051 Basel
Tel.: +41 61 207 23 92, Fax: +41 61 207 23 93, E-Mail: ceps@unibas.ch
www.ceps.unibas.ch

Dear readers,



One should celebrate the feasts as they fall! Yes, it might be true that at the age of 10 one has barely outgrown the boorish age and as far as outcome or impact is concerned, concluding evaluations are premature. Nevertheless, we would like to take the opportunity to celebrate. In doing so, we are not so much concerned with the CEPS (of course, too!) but first and foremost with the development of philanthropy and the nonprofit sector in recent years.

The perspectives and approaches within this area are very varied. Entrepreneurs speak of strategic philanthropy, financial markets of impact investing, politicians of civic engagement, lawyers of charitable status, social researchers of charity. And there are many more terms.

However, it would be detrimental to the future development if this diversity continues to lead to differentiation. Instead, the common ground should be sought in order to address together the social problems for which philanthropic funds are made available. Then, there soon will be even better reasons to celebrate!

Wishing you a pleasant read,

Georg von Schnurbein

10 Years Center for Philanthropy Studies

The Center for Philanthropy Studies (CEPS) was launched ten years ago. Since then, it has evolved into a key intersection between academia and practice, addressing subject matter oriented toward a broad understanding of philanthropy. By Georg von Schnurbein.

A rather unusual process preceded the establishment of the CEPS: In spring 2007, SwissFoundations invited four Swiss universities to apply for start-up funding for a «center of excellence for foundations and philanthropy» within the context of a request for proposals. What spoke in favor of the University of Basel was the commitment on the part of the university management as well as the envisioned orientation toward a broad spectrum of philanthropy-related topics.

Shaping understanding of philanthropy

The topics dealt with at the CEPS have always been oriented toward a broad understanding of the term philanthropy and the interdisciplinarity that this entails. For us, philanthropy simply includes «every voluntary private action for a charitable purpose». This not only includes foundations and major donors but also any kind of assistance, whether in the form of volunteer work, donations, in kind contributions, or knowledge. This means that philanthropy is a society-wide phenomenon and is not restricted to acts by the prosperous or to mere generosity.

International research orientation

The CEPS places its academic focus on topics such as governance, financial management, impact measurement, and the foundation system. Since 2009, these topics have been the subject of 150 publications, 29 of which appeared in peer-reviewed journals. By building up its own database in particular, the CEPS has succeeded in creating a sound basis

for research into the nonprofit sector in Switzerland. Key results in recent years include a model for volunteer coordination, insights into the impact of an NPO's purpose orientation on investment, the design and use of evaluations, and a management concept for charitable foundations. In this way, the CEPS has made its own contributions to the academic debate while also making knowledge available to practitioners. As well as through the Swiss Foundation Report, this was achieved above all through a series of publications entitled «CEPS Forschung & Praxis» (CEPS research and practice) and by co-publishing the third edition of the Swiss Foundation Code.

In addition, an executive education program for NPO managers has been developed and is continually updated with the latest research findings. The modular structure, consistent application of the «blended learning» principle, and courses repeated on an annual basis provide participants with the utmost flexibility so that they can complete continuing education on a part-time basis in parallel to their work. Since the program's inception, more than 900 participants have attended the courses in addition to a further 1,200 who have attended day events and the regular «Philanthropie am Morgen» (Philanthropy in the morning) events in Basel.

Prospects for the future

At ten years of age, the CEPS has a very short history, especially as part of Switzerland's oldest university, and our

CONTENT

10Years CEPS	01
CEPS Event Series	02
Philanthropy: 10 Statements	03
For a Good Read	04
Calendar	04

perspective is therefore more forward-looking. First of all, the CEPS will make an even greater contribution to the international academic community. In 2018, it will publish a handbook on corporate foundations that was drawn up in collaboration with colleagues from Erasmus University Rotterdam as part of a research project spanning several years. In fall 2018, the Basel Convention on Philanthropy will be held for the first time aiming at building bridges between academia and practice.

In the coming years, research by the CEPS will look more intensively at the context of philanthropic activities. On the one hand, the underlying data it has produced will be used to gain a better understanding of philanthropy's significance in various areas of society. On the other hand, developments in philanthropy at the global level, and in particular the financial flows, will be studied and analyzed.

Nowadays, the question of the Theory of Change is never far from people's lips. The logic of social change at the CEPS centers around a comprehensive focus on research and consistent knowledge transfer. We look forward to continuing this work in the future!

Georg von Schnurbein

More than 80 guests attended the CEPS and SwissFoundations event on March 12th 2018 at the Cabaret Voltaire in Zurich (article below).

Fatihah Bürkner (Max Kohler Foundation), Amina Chaudri (ETH Zurich Foundation), Pascale Vonmont (Gebert Rűf Foundation) as well as Georg von Schnurbein and Robert Schmuki from the CEPS discussed the changes in philanthropy in Switzerland.



CEPS INSIGHT

Changes in Team

Michèle Spring as student assistant (since January) and Jonas Kipfer-Berger as research assistant (since March) are now part of the CEPS-Team. Rebecca Wirbel left the CEPS in January to pursue a student exchange semester abroad.

ceps.unibas.ch/en/about-us/team/

Foundation Overview

The Swiss Federal Office for the Environment now offers an overview of 655 Swiss foundations in the field of environment and energy. The CEPS is pleased to have participated in the development of this overview.

www.bafu.admin.ch/bafu/en/home/topics/education/environmental-research/funding-by-foundations.html

CEPS Annual Report

CEPS can look back on a successful year 2017. Among other things, various publications have appeared in internationally recognised journals and our executive education programmes enjoyed a high level of popularity.

ceps.unibas.ch/en/about-us/annual-reports/

10 Years CEPS – Series of 10 Events in 10 Swiss Cities

CEPS is celebrating its tenth anniversary with ten events in ten Swiss cities. The aim is to work with local partners to shed light on the entire breadth of philanthropic work and to deepen the understanding of it in discussion rounds. On March 12th, the series was opened with the question of how charitable work has changed over the past ten years and where it is currently heading.

More than 80 guests followed the invitation by SwissFoundations and CEPS to the Cabaret Voltaire in Zurich. No seats remained vacant when Lukas von Orelli, president of SwissFoundations, welcomed the audience.

The event focused on the changes that philanthropy has experienced over the past ten years and is currently undergoing. Georg von Schnurbein started off by outlining these developments from a scientific point of view. These changes were then further debated in a panel discussion. Pascal Vonmont from the Gebert Rűf Foundation, Amina Chaudri from the ETH Zurich Foundation and Fatiah Bürkner from the Max Kohler Foundation, together with Georg von Schnurbein and Robert Schmuki from the CEPS, discussed how charitable work has changed over the past years and in which directions it is moving. The discussion group pointed out the changes resulting from digitization and stricter legal pro-

visions, discussed the extent to which philanthropy is shaped by women and dealt with the complex relationship between sponsors and funding recipients. Pascale Vonmont's statement that any funding activity can only be as good as the work of the funding recipients was very much appreciated, not only by guests from operational nonprofit organizations.

In view of future developments, a new, cooperative and participatory approach to problems was described, which includes sponsors, funding recipients, but also partners from government agencies and business. Fatiah Bürkner's statement, expressing doubts about the actual willingness of the NPO world to cooperate, confirmed that this path can also be rocky. Georg von Schnurbein jokingly remarked that this was due to the nature of foundations; for if the founder had wanted to cooperate, he or she would probably have rather founded an association.

Nevertheless, the need for closer cooperation between different actors was emphasized by all participants in the discussion round.

The fact that the field of philanthropy is constantly in motion, that it presents great challenges, but also brings a lot of joy, became clear in the following aperitif, which was marked by an intensive exchange between the guests present.

Upcoming Events

The series of ten events will be continued on May 24th at the Coalmine in Winterthur together with the Volkart Foundation, with a panel discussion on «Philanthropy and Politics». This will be followed by events in Geneva, Aarau, Bern, Chur, Zug, Solothurn, Lucerne and St. Gallen. You will find the latest information on the CEPS website.

Robert Schmuki

Further information (in German):
<https://ceps.unibas.ch/de/weiterbildung/tagesseminare/>

10 Insights Concerning the Developments in the Area of Philanthropy

How has the field of philanthropy changed, where does it stand today and in which directions is it moving? 10 people who are closely connected to the area have shared their insights with us.



Prof. Dr. Helmut Anheier,
Centre for Social Investment,
University of Heidelberg

Three key challenges can be highlighted: lessons have been learned from the financial crisis and the period of low interest rates, but these lessons have barely been implemented; social investment models offer a wealth of new opportunities for philanthropic engagement, but too little use is made of them; and foundations have too often seen a deterioration in their (inter)national field of action, although a countermovement is beginning to emerge. Mixed results, in other words!



Beate Eckhardt,
Managing Director
SwissFoundations

The last 10 years have seen Switzerland's foundation sector grow in both size and strength. Foundations want to make a difference and generate added value for society. Increasingly, they are working both strategically and in partnerships in order to achieve this. The challenge for the future will be to make the sector more visible, more accessible, and more transparent. This is the only way to safeguard the legitimacy of foundation work on a lasting basis.



Markus Mader,
Director Swiss Red Cross
(SRC)

It has become clear to us that philanthropy meets a genuine need. We have received substantial, in some cases spontaneous, donations from wealthy private individuals who show a keen interest in our work. Their engagement is in line with the principles of the Red Cross, and we thus believe it is important to shape the relationships with these philanthropists in a purposeful manner. In addition to their financial support, they can contribute to the content of our work.



Dr. Pascale Vonmont,
Director Gebert RUF
Stiftung

In the last 10 years, Switzerland's foundation sector has seen above-average growth in conjunction with increasing professionalization. Sociopolitical discourse regarding the role and significance of foundations has not kept pace with this growth – and this uncertainty can be attributed to insufficient awareness of the sector and a lack of statistical recording. In this regard, the challenge for foundations is to demonstrate the effectiveness of their own sponsorship activities.



Gaby Ullrich,
Stiftung Pro Juventute,
Divisional Head of Marketing

Those engaging in philanthropy want visible impact. Donations that can be used freely are becoming rarer in favor of those earmarked for changes at the social or individual level and specific projects with a measurable ROI. This necessitates collaboration in the form of partnerships, transparency in controlling and reporting, a high level of professionalism, and the joint development of projects and services that meet the foundation's purpose, the donor's wishes, or the CSR objectives.



Dr. Tizian M. Fritz,
Swiss Science Council
(SSC)

The professionalization of the sector has encouraged entrepreneurial approaches to coping with challenges, and the visibility of terms such as impact investing has increased. These approaches are a source of hopes and desires but, at the same time, there is (still) only so much they can achieve. If we are to realize the full potential of such approaches, all participants will in the future have to be open and honest about expectations of what instruments like these can actually do.



Dr. Christoph Degen,
Managing Director
ProFonds

Increasing regulation and difficult conditions on the financial market since 2008 have made running a foundation more challenging. Fortunately, there are plans for targeted legislative adjustments that will make the foundation sector more attractive and simplify the running of foundations. If the foundation is to fulfill its main purpose, it is essential that its money be invested professionally, particularly in shares.



Dr. Beat von Wartburg,
Director Christoph
Merian Stiftung

Since the turn of the millennium, the dynamic development of the foundation sector in Switzerland has continued uninterrupted. With the growing number of foundations and the increase in earmarked assets, foundations have grown both in diversity and in their importance and responsibility to society. The qualitative demands of the Swiss Foundation Code are therefore all the more necessary: self-reflection, relevance, governance, transparency, and effectiveness.



Prof. Dr. Michael Meyer,
WU Vienna, Institute for
NPO-Management

In Austria, civil society proved its effectiveness in 2015: without NPOs, it would not have been possible to take in 100,000 refugees or to see to the needs of almost 1 million in transit. Private philanthropy is growing but remains a tender sapling in Austria. The hundreds of startups developing entrepreneurial solutions to social problems offer some cause for optimism. If the impact investment market follows suit, these could bring about a wonderful new social reality.



Christian Tohmé,
International Committee
of the Red Cross (ICRC)

The winds of change have gradually made their way into the charitable sector in the last decade and have driven philanthropy, in all its different hues, further down the path of diversity, creativity, and professionalization. Today, the universe of socially desirable outcomes is more varied, more interconnected, more future-oriented, and – last but not least – more impact-conscious thanks to initiatives like the CEPS. Kudos!

CAS Global Social Entrepreneurship

In September 2018 the certificate course (CAS) Global Social Entrepreneurship starts with an innovative concept.

Bringing together participants from developing and emerging countries and European industrialized countries to build social enterprises together – this is the declared goal of the CAS in Global Social Entrepreneurship.

Twice in the past the CEPS was able to offer this course in cooperation with BOOKBRIDGE. In summer 2018, after a one-year break, the third edition will get underway – with an innovative concept of face-to-face and online instruction and projects in various countries. The course is supported by Fondation Botnar.

Pioneers and Explorers

The course is aimed at two target groups: On the one hand, at social entrepreneurs from developing and emerging countries – so-called «pioneers». On the other hand, at «explorers» from European industrialized countries, such as project leaders from nonprofit organizations, foundations and international organizations as well as CSR managers.

Modular Design – diverse content

The course has a modular structure and lasts from late summer 2018 to May 2019, with topics such as organizational theories, financing models and impact measurement being taught in e-learning and face-to-face classes. The acquired knowledge is applied in practice for the

first time at the meeting of the two groups, specifically during the presentation of the project ideas by the pioneers and their further development together with the explorers.

In a next step, the project ideas will be intensively pursued on site in the project countries for one week. The CAS then concludes with a joint evaluation of the projects carried out.

Maria Clotilde Henzen

Further information:
<https://ceps.unibas.ch/en/executive-education/>

DID YOU KNOW?

79%

Financing structures of Swiss NPOs are changing: public funds are declining, private donations are in short supply and services are in competition with those offered by the private sector. Regarding these developments, 87 NPO executives were asked about the prospects of their organization. Despite the many challenges, 79% of the respondents are optimistic about the future.

Source: CEPS Forschung & Praxis, Vol. 18 (April 2018)

For a Good Read

A closer look at Germany's foundation landscape.



Published in 2017, three volumes entitled «Stiftungen in Deutschland» (Foundations in Germany) discuss the role of German foundations in society. The publications are the result of a three-year joint research project by the Hertie School of Governance in Berlin and the Heidelberg University's Centre for Social Investment.

In accessible language, the authors present a multitude of topics to readers and thereby paint a comprehensive and empirically sound picture of Germany's foundation landscape. Among other things, they discuss the current status of – and trends within – research into foundations and philanthropy; they highlight the societal role of foundations in different areas such as education, science, or culture; and they address the typical strengths and weaknesses of different types of foundations. As well as providing a comprehensive overview of Germany's foundation landscape, the volumes also address selected topics such as strategic philanthropy, advocacy, and differences between foundations in East and West Germany. A thoroughly worthwhile read.

Nicholas Arnold

Source: Anheier, H. K.; Förster, S.; Mangold, J.; Striebing, C. (Ed.): Stiftungen in Deutschland. Springer VS, Wiesbaden, 2017.

CALENDAR

EXECUTIVE EDUCATION (GERMAN)

ONLY FEW PLACES LEFT!

CAS Nonprofit Governance & Leadership

Module 1: Apr. 9th - 12th 2018, Sigriswil

Module 2: May 14th - 16th 2018, Basel

Module 3: June 4th - 7th 2018, Basel

Philanthropie am Morgen

June 14th 2018, Basel

Talking about impact

CAS Kommunikation & Wirkungsmessung in NPO

Module 1: Aug. 20th - 23rd 2018, Spiez

Module 2: Sep. 10th - 12th 2018, Basel

Module 3: Oct. 22nd - 25th 2018, Basel

CAS Global Social Entrepreneurship

From September 2018, in revised format

<https://ceps.unibas.ch/en/executive-education/cas-in-global-social-entrepreneurship/>

FURTHER DATES

NPO-Forschungscolloquium

Verbandsmanagement Institut

Apr. 19th & 20th 2018, Freiburg/CH

Stiftungsvermögen 2.0

PPCmetrics

May 15th 2018, Zürich

Swiss Philanthropy Project Day

StiftungSchweiz & Die Stiftung

May 15th 2018, Zürich

Deutscher Stiftungstag

Bundesverband Deutscher Stiftungen

May 16th - 18th 2018, Nürnberg/DE

Swiss Foundation Symposium

SwissFoundations

June 19th & 20th 2018, St. Gallen

LEGAL NOTICE

PUBLISHER



University
of Basel



Center for Philanthropy Studies,

Steinengraben 22, 4051 Basel

www.ceps.unibas.ch

EDITOR

Nicholas Arnold (n.arnold@unibas.ch)

LAYOUT & PICTURES

a+ GmbH, Steffen Bethmann

© Unsplash/Andreas Weiland

© CEPS 2018

Available online:

<https://ceps.unibas.ch/en/philanthropie-aktuell/>