



Philanthropie Aktuell

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EDITORIAL

Dear readers,



The year 2020 is all about flexibility and change. Of course, the COVID-19 virus has played an important role in this process, but in the end, the virus has only accelerated certain developments that

had already been set in motion. This includes the changed notions of work, which has resulted mainly from new technological, but also social developments. For nonprofit organizations (NPOs), this can bring profound changes, just as it did in the past.

In 1912, for example, the new civil code came into force in Switzerland. Among others, it created the new legal forms of association, foundation and cooperatives. Thus, many organizations had to decide which of the new legal forms they wanted to adopt.

At that time, exceptions were allowed for family foundations, who thus did not necessarily have to face a new era. However, this year at the latest, they are caught up by developments: By 31 December, all family and church foundations must be registered in the commercial register. However, only organizations according to the Swiss Civil Code (ZGB) are permitted registration.

This example shows two things: Fundamental changes take place in NPOs time and again, and NPOs have to deal with these changes. I would say: the earlier, the better.

Wishing you a pleasant read.

Georg von Schnurbein

CONTENT

A foundation breaks new ground	01
New Work: a wide world	02
Interview: Ursula Meyerhofer	03
Yearbook of Charities 2020	04
Calendar	04

A foundation breaks new ground – and masters Corona

The foundation IdéeSport has opted for a new organizational form. In the future, it will do without superiors, will distribute management tasks, become organized in circles, and give its employees more decision-making powers. The foundation has ventured into agile transformation. By Sandro Antonello

Today's world is moving fast and is increasingly complex. Employees want flexibility, combine leisure time with work, and they strive for meaningfulness in their daily activities. New approaches and forms of teamwork are required. Many organizations are concerned with the question of WHAT they do and HOW they do it. At the same time, the question as to WHY is becoming increasingly important. This WHY, the «raison d'être», is the central element within the world of foundations. In our opinion, this is the ideal prerequisite for agile forms of work.

A team assuming responsibility

In May 2019, all IdéeSport employees expressed their support for an agile organizational form with shared management responsibilities. The transformation project is being planned and implemented by nine of the foundation's employees. The current management meanwhile only has an advisory role and has handed over responsibility to the project team. Latter is organized according to the agile process known as Scrum. This means that the project team has a clear goal, but is free to implement this goal as it sees fit. In small continuous steps, experiences are gathered, ideas are tested, and the organization is developed profitably and holistically.

First milestones have been reached

Important results are already visible. For example, the foundation's new structure,

a circular model, has been developed. In contrast to rigid and very hierarchical structures, in the circular model the individual teams function in a self-organized manner, make decisions themselves, and thus take on more responsibility. For example, they are in direct exchange with our target group and sponsors, and act at their own discretion. The common strategy and vision of the foundation form the framework around which the teams base their decisions. Further milestones were the removal of regional management and other leadership roles as well as the recruitment of the new managing director by the employees themselves. An important step will be taken at the end of 2020 with the dissolution of the executive board.

Agility does not equal lack of leadership

An important element of the transformation process was the replacement of leadership in the classical sense by principles of collegial leadership. This means that the foundation's management tasks are no longer performed by specific individuals, but are distributed among many employees. The role of the executive board and the managing director are thus undergoing a significant change. These bodies are increasingly taking on coaching and servicing functions. They serve the value-creating teams, develop framework conditions, and eliminate obstacles. Does this mean that everyone can participate in each and every decision-making process?

No. Agile organizations are neither chaotic nor leaderless or organized in the sense of grassroots democracy. Neither does such self-organization mean that everybody is left to their own devices. There are clear rules, processes, roles, and forms of knowledge sharing. A framework must be created and one has to define who can decide what, where, and how.

More space for innovation

IdéeSport has already been able to benefit from its new organizational structure. Due to the Covid-19 lockdown, in early summer 2020 and within just a few weeks, we designed a new project for children, and found partners and locations, so that the activities could be launched throughout Switzerland during the summer vacations. This shows that the employees are assuming the responsibility assigned to them and are flourishing in the process. Lena Kopp, member of the implementing project team, describes this as follows: «The best project is created when the team can be put together flexibly according to strengths, experience and resources, when ideas

Organizations from a wide variety of sectors are increasingly concerned with alternative organizational models, not least nonprofit organizations. However, New Work comes in many different forms (see article below) – and organizations should intensively consider which form suits them best.



Figure: Reinventing Organizations: Illustrated Edition, Frederic Laloux

are heard by everyone, and decision-making paths are short. Everybody puts their heart and soul into the project, because it is also ‚theirs‘.»

Both challenge and enrichment

Employees are looking forward to the new tasks and responsibilities that will be assigned to them by the new organizational set-up. However, the introduction of these agile structures and processes is also associated with uncertainties and ambiguities for them. They had to be-

come familiarized with new work processes, deal with new patterns of thinking and let go of others.

IdéeSport is one of the first nonprofit organizations in Switzerland to venture on the path to self-organization. Entirely in the spirit of agility, the foundation would like to make the knowledge gained available to other organizations.

Sandro Antonello is head of HR and organizational development at IdéeSport: <https://www.ideesport.ch>

The core idea behind the wide world of New Work

Various new models of collaboration are summarized under the term New Work. Prompted by Google & Co., which celebrated successes with such models, the discussion surrounding such models has increasingly reached the NPO sector. But New Work encompasses more than just a new organizational structure.

Although the term New Work points to something new, thoughts on it have a history of more than 90 years, and were triggered by the Hawthorne Experiments of 1927-1932. It is therefore worthwhile to take a look at the various ideas, methods and models that fall under the term New Work.

Agile methods and organizations

«Agile» methods originate from software development, where such methods are aimed at quickly arriving at useful solutions without the traditional planning processes. Expressions such as Design Thinking, Scrum, Kanban or Agile are all based on the same basic idea: new products are quickly tested in practice in order to immediately find improvements based on the experience gained. In the sense of an iterative process, everything can be questioned and rethought, always with the goal of approaching the best possible solution.

Self-organization

Agile working methods require teams with a high degree of autonomy and personal responsibility, which can be continuously reconfigured according to the knowledge and experiences required. Although this sounds chaotic, such cooperation is based on clear processes, sometimes even a «constitution». The goal is to ensure that all employees have a say and that no one becomes dominant.

Sociocracy and Holacracy

Agile models and self-organization have also been cast into overarching models. Sociocracy and Holacracy are the two most cited. But in the sense of the basic idea inherent in the term «agile», hardly any organization follows such models to the letter. NPOs known to us who use such models have each developed their own „...-cracy“ or are constantly developing it further.

Consent as a central element

An important element of New Work is decision-making by consent, rather than by majority or consensus. A team member’s proposal is only then not implemented when there are important and well-founded counter-arguments. In absence of this, the proposal is implemented, perhaps with certain adjustments.

«Teal» as target

According to Laloux, author of «Reinventing Organizations», humanity has gone through five stages of cooperation: from the dominant leader model to the current stage of New Work with the color «teal». In the latter, the organization has an evolutionary and holistic goal that is aspired towards by all members in a self-organized, agile and mutually supportive manner.

Robert Schmuki

Laloux, F. (2014). Reinventing Organizations, Nelson Parker.

«It makes no sense to lump all organizations together»

Nonprofit organizations (NPOs) are increasingly concerned with the topic of New Work. We were able to speak with Ursula Meyerhofer, lecturer in the CEPS executive education course Nonprofit Governance & Leadership, about whether such approaches are suitable for NPOs and what they need to consider when implementing new forms of organizing.

CEPS: In the corporate world, one hears more and more about New Work approaches. What is the situation in the NPO sector?

U.M.: There are no differences per se. The interest in such approaches is generally high, not least among NPOs. However, it makes little sense to lump all organizations together, because there are large, small, old and new organizations that pursue a very wide variety of purposes. Therefore, the preconditions for New Work models vary greatly from organization to organization. The first important step is certainly the identification of pain points, i.e. to find out, what main challenges one's organization is facing.



With her consulting company «menschundzukunft» Dr. Ursula Meyerhofer on a daily basis accompanies organizations in the areas of team leadership, self-management and self-organization. She also lectures at various technical colleges and universities.

CEPS: You mention pain points. Can you further elaborate on this?

U.M.: The demands that companies as well as organizations such as foundations and associations face, are constantly changing. Ongoing challenges include new customer interests, demographic changes among customers and employees, cost pressures and competition. In connection with this, the question of new social services is also constantly arising. Today, issues such as job cuts and reduction of funds are increasingly taking center stage. In addition, questions concerning better internal communication and appropriate knowledge management are also being raised. All of this creates a certain pressure to innovate as well as a lot of uncertainty. At the same time, this opens up the opportunity to think carefully about whether the current organizational and management styles are still adequate.

CEPS: What challenges do NPOs face, when they attempt to take steps towards more self-organizing organizational models?

U.M.: Research and teaching so far have rather little insights to offer in this area, except for the realization that there are self-organizing phenomena and that hierarchy is not necessarily a law of nature.

Digitalization is certainly a strong driver of such alternative organizational models, because it holds out the prospect of something new and also changes processes, which are becoming more collaborative and iterative. In effect, the implementation of such alternative organizational models has often happened in the area of software development. However, many an NPO is far from being a colorful, agile bunch of developers working on B-versions in close cooperation with the client. NPOs often have more distance to their «customers», «donors» or «beneficiaries». Therefore, an NPO should reflect well, where such considerations for new forms of organizing come from and what expectations are associated with them. One does not have to keep up with every development.

I find the approach of reviewing one's own learning very useful: How is learning done in the organization, is knowledge shared or put to the test? I also recommend that an organization should constantly question itself: What are we here for? What is our vision, what are our common values? And where do we want to go? Discussing these points with all stakeholders is a step that generally can only benefit the future viability of an association or foundation.

At the same time, it is a way of meeting the greatest challenges associated with the development of New Work models for one's own organization, namely, overly ambitious goals and time pressure. It doesn't seem to be common knowledge yet, but every organization goes its own way. It is certainly possible to introduce innovations step by step, but this requires taking into account the own values and the needs of all stakeholders involved.

CEPS: Finally: Around these new forms of organizing one hears many new terms such as New Work, sociocracy, teal etc. Are there differences?

U.M.: Absolutely. Agile does not equal sociocracy does not equal holacracy. I suggest that organizations have these terms explained to them and that they draw on the experiences of other organizations. Only on the basis of such an introduction does a step-by-step implementation make sense. In principle, one should not abandon one's own values and objectives. After all, every organization has the opportunity to accelerate its own maturation by finding out what suits it and what the right steps are at a particular moment. I strongly advocate this path. No squinting at «half-baked quickwins» that can backfire. A successful change process is the reward for careful planning.

CEPS: Many thanks!

CEPS INSIGHT

Back home after a short break

From 23 December 2020 to 3 January 2021, the CEPS will take a short Christmas and New Year break. From 4 January 2021 on, we will be available to you again, then back «home» at Steingraben 22, 4051 Basel. The whole CEPS team wishes you happy holidays, a successful beginning to the New Year and above all good health.

Time to say goodbye

With a mixture of happiness and sadness, the CEPS says goodbye to two long-standing employees. After a total of almost ten years at our institute, first as student assistant and then as PhD candidate, Sara Stühlinger is leaving the CEPS in December. Theresa Gehringer's time with us is also coming to an end this month after six years as student assistant and PhD candidate. The CEPS would like to thank Sara and Theresa for their long and very valuable commitment to our institute. We wish them both only the best for their professional and private future.

A closer look at NPOs' key financial figures

At the beginning of December 2020, the Yearbook of Charities (Jahrbuch der Hilfswerke) was published for the sixth time. In the Yearbook, the CEPS and PPCmetrics shed light on the most important financial figures of Zewo-certified nonprofit organizations (NPOs) in Switzerland.

The sixth Yearbook of Charities is based on the 2019 annual accounts of 452 of the 499 Zewo-certified Swiss NPOs. The data analysis shows that the investigated organizations have an average balance sheet total of 11.3 million Swiss francs. The balance sheet of individual organizations ranges from a few thousand to almost 600 million Swiss francs. The differences in size between NPOs are therefore considerable and are diverging continuously as a comparison with data from previous years shows. As far as reserves are concerned, it is clear that quite a few NPOs need to catch up in this area in order to retain the ability to react to negative shocks. The COVID-19 pandemic clearly shows that NPOs are well advised to maintain adequate reserves to avoid a sudden bust in crisis situations.

The COVID-19 pandemic and its impact on the financial situation of NPOs is one of the main topics of the 2020 edition of the Yearbook of Charities. This year's edition also provides deeper insights into the cantonal and linguistic distribution of NPOs in Switzerland and the size of their management bodies. It is apparent, for example, that in relation to the number of inhabitants, significantly more of the organizations studied have their headquarters in German-speaking

Switzerland than in other language regions. The size of the management bodies averages eight people and ranges from three to an astonishing 38.

We are particularly pleased about one piece of news: From March 2021, we will make the data analyzed in the Yearbook of Charities publicly available in aggregated form. In the NPO Data Lab (www.npodatalab.ch), everyone interested will have the opportunity to carry out individual analyses.

Nicholas Arnold

Yearbook of Charities 2020 (in German)
<https://ceps.unibas.ch/de/publikationen/#c1163>

DID YOU KNOW? 800

Since February 2020, the CEPS is represented on LinkedIn. We are happy about the interest in our institute, and having been able to welcome more than 800 new followers. Of course, we will continue to report on developments and events related to philanthropy and NPOs on our social media channels next year.

[linkedin.com/company/cepsbasel](https://www.linkedin.com/company/cepsbasel)

Foundations & the SDGs

What contribution do corporate foundations make to the Sustainable Development Goals? Research by the CEPS provides insights.

In a recently published scientific article, Theresa Gehringer, research assistant at the CEPS, investigated how corporate foundations contribute to the achievement of the United Nations Sustainable Development Goals (SDGs). She also explored the question of how the SDGs are integrated into organizational processes of such foundations.

Based on a survey among managing directors of corporate foundations in Switzerland, Liechtenstein and Germany, the study shows that these foundations can contribute to the SDGs not only as financial intermediaries. Rather, their special characteristics and their position between the private sector and civil society enable them to initiate cross-sector partnerships. These are crucial for bringing about systemic change in order to reach the SDGs. However, according to the survey results, this potential has not yet been fully exploited.

The paper «Corporate Foundations as Partnership Brokers in Supporting the United Nations' Sustainable Development Goals (SDGs)» has been published in the journal «Sustainability» and is available under the link provided below.

Theresa Gehringer

<https://doi.org/10.3390/su12187820>

CALENDAR

Executive Education

Philanthropie am Morgen

11 February 2021, online

Intensiv-Lehrgang Stiftungsmanagement

08 - 12 March 2021, Sigriswil

CAS Nonprofit Governance & Leadership

3 Modules – Wilen & Basel

Start: 12 April 2021

CAS Wirkungsmanagement in NPO

3 Modules – Sigriswil & Basel

Start: 23 August 2021

CAS Global Social Entrepreneurship

5 Modules – online, on-site, Basel

Start: 27 September 2021

[Register Now -> CEPS Executive Education](#)

FURTHER DATES

Funding the Future

DAFNE

19 January 2021, online

PEXforum 2021

DAFNE

27 - 28 January 2021, online

Gute Gesuche stellen:

Förderbereich Kultur

SKM, Universität Basel

02 February 2021, Basel

NPO Research Colloquium 2021

Johannes Kepler Universität

08 - 09 April 2021, Linz (AT)

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PUBLISHER



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LAYOUT & PICTURES

a+ GmbH, Steffen Bethmann

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