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## EDITORIAL

Dear readers,



Volunteering has a long tradition. Voluntary commitment dates back to antiquity – when it was however reserved exclusively for the upper class. With the emergence of the bourgeoisie in the 19<sup>th</sup> century, social commitment was used to curb the authorities. Today, it is often seen as a supplement to welfare state benefits.

In the light of the current demographic and technological changes, voluntary work itself is also in need of re-definition. This type of commitment is increasingly taking place outside the organizational boundaries of nonprofit organizations (NPO), whether through social media (e.g. during the refugee crisis) or in the context of short assignments at events. At the same time, NPO are becoming more and more professional, which restricts volunteers' scope for design and deployment, if they do not possess the appropriate qualifications.

In this issue we take a closer look at the professionalization of NPO and the resulting consequences for NPO and society. With our activities in the CAS Global Social Entrepreneurship and the first edition of the „Basel Convention on Philanthropy“, we are bringing international developments to Switzerland this autumn. We are looking forward to your participation!

Wishing you a pleasant read!  
 Georg von Schnurbein

## NPO in Flux: From Do-Gooders to Role Models

**As Director of Cultural and Social Affairs at the Federation of Migros Cooperatives, she has a profound insight into the world of NPO: Hedy Graber discusses increased demands, innovation, and the exemplary role of NPO.**

Nonprofit organizations (NPO) are vital to social cohesion. Whereas the legal basis is primarily the responsibility of the state, the innovative capacity to create new impetus often lies with civil society and NPO, which play an active role in shaping social change. Given the steadily increasing complexity, corresponding questions cannot be answered from one perspective alone. For that reason, new partnerships between NPO, the public sector, and the market are needed now more than ever – a joint approach is essential to tackling current global issues such as digitalization, demographic change, New Work, or climate change.

The special challenge for NPO is not only to ensure their economic survival in a rapidly changing environment but also to constantly justify their reason for existence. They are not steered by customer needs but rather by the available resources and the purpose of the association or foundation. NPO therefore find it harder to evolve because their action is guided only by indirect indicators such as falling membership or income from donations, for example. At the same time, NPO are also very much in a position to adapt their remits to the future.

cialists but, above all, of theater lovers. As a result, the demand for professional management often pushes an NPO to its limits. The call for professionalism has also increased considerably within NPO themselves: Before they get involved, members and volunteers now want to see clear structures and defined responsibilities so that they know how they can put their own capabilities to use and how much time this will require them to invest.

In addition, megatrends such as mobility, flexibilization, and individualization mean that people no longer want to take on long-term commitments. In this environment, cooperation is becoming more and more important. Chances of achieving one's own objectives increase considerably if one cooperates with others: Success can be brought about more rapidly through mutual coordination, the joint fulfillment of tasks, and the sharing of resources, knowledge, and capabilities.

### NPO as role models

We are seeing that certain for-profit organizations (FPO) are deliberately sacrificing profit – in favor of meaningful projects that benefit society. Migros has a long tradition in this regard in the form of its „Culture Percentage“, which has been enshrined in its statutes since 1957, as well as the „Engagement Migros“ development fund, launched in 2012. In our view, the fact that FPO are increasingly seeking out meaningful projects seems to be linked to phenomena such as Generation Y: Digital natives who prefer to

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work in teams rather than hierarchies, who value a job they enjoy over status and prestige, who want a balance between work and leisure, and who aspire to a job that offers meaning.

Sponsors and the public sector play an important role in the development of NPO. They provide professional and financial support and take responsibility for impact assessment, quality development, and the professionalization of personnel. The prerequisites for this are cooperation, exchange on equal terms, and clarity as to what both parties – the service provider and the financial backer – need and are able to provide.

**New forms of cooperation**

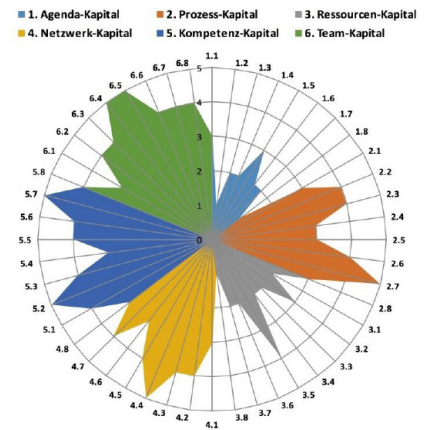
With our „Engagement Migros“ development fund, we are finding that both recipients and providers of funding can learn from one another by jointly discussing the intended impact of a project. Our agreements are designed to allow learning and can be adapted according to the project’s development.

Sponsors can therefore also learn a great deal from NPO. In this context, a refreshing trend can be witnessed in the nonprofit sector: Organizational forms

**CEPS-Tool: „NPO-Entwicklungskapitale“**

In order to achieve its own objectives, every NPO has capital, not only in the financial sense but also in the form of expertise, volunteer staff, or the relevance of a social problem. The capital model produced by the CEPS differentiates between six types of capital. For an NPO to achieve long-term and sustainable success in its work, it needs to build up as much capital as possible in each of these areas. The CEPS tool is intended to provide a basis for determining where to target the organization’s development. As of now, the tool is only available in German.

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such as Holacracy, hybrids of NPO and volunteers, or the revival of cooperatives, are becoming new reference structures. Cooperation is focusing heavily on new digital tools that are used in the start-up scene. Is that professionalization? Will these NPO themselves become a reference for FPO, for example? And are NPO therefore shaping the new standard or the new forms of organization and collaboration? That is entirely possible, and it demonstrates that, nowadays, successful projects require new forms of co-

operation that put the state, the market, and civil society on an equal footing.

Hedy Graber

Hedy Graber has been the Director of Cultural and Social Affairs at the Federation of Migros Cooperatives in Zurich since 2004 and is responsible for the „Migros Culture Percentage“ and the „Engagement Migros“ development fund, among other things.

**Exchange and Self-Evaluation as Important Drivers of Organizational Development**

Management work in the foundation council/board of directors as well as the analysis of one’s own potential are of central importance for the organizational development in nonprofit organizations. CEPS offers free self-evaluation tools for both areas – and also actively promotes the exchange of knowledge between NPO.

There are two key areas of every nonprofit organization and therefore of their organizational development: the management work by the board of trustees or directors, and the analysis of the organization’s own potential. For these two areas, the Center for Philanthropy Studies (CEPS) has developed self-evaluation tools that can be used free of charge (see link at end of text – as of now, these tools are only available in German).

**Tool 1: Governance self-assessment**

Boards of directors and boards of trustees act as an organization’s strategic management body. However, the complexity of tasks involved in strategy development and governance is typically met with very limited time reserves on the part of boards of trustees and directors.

The smooth functioning of these bodies is therefore all the more vital for successful organizational development. Their professional composition, continuous renewal, access to knowledge, and collaboration with management

must be reviewed and analyzed frequently. The “Governance Self-Assessment” tool developed by the CEPS can provide valuable assistance with this.

**Tool 2: Analysis of potential**

NPO operate in an increasingly complex environment in which a multitude of stakeholder groups help to determine the success and impact of their work.

Unlike in the world of profit, there are no causal relationships between rendering a service and price. For this reason, models aimed at optimizing a value chain, branding, or gaining a competitive advantage are of very limited use – if any.

The CEPS has therefore drawn on its consultancy work to develop a capital model that aims to help organizations prepare themselves for the complex NPO market. The corresponding self-evaluation tool “NPO Entwicklungskapitale” analyzes the different operational and thematic strengths of an NPO in order to make it easier for management teams and boards of directors to develop

a targeted strategy.

**Exchange as recipe for success**

The evaluation tools described in the previous sections can give NPO important inputs for their own further development. Equally important, however, is to harness the abundant experience within the NPO world through the mutual exchange of knowledge and ideas. How this can work is shown, for example, by the Mercator Foundation’s „Expeditions“ project, which allows people to immerse themselves in the worlds of other organizations.

Promoting direct exchange is also important to CEPS – for example within the framework of „Philanthropy am Morgen“ and the „NPO SkillShare“ project, which is currently being developed.

Robert Schmuki

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## “Professionalization is Fundamentally a Positive Thing”

There is growing demand – from various sides – for the professionalization of nonprofit organizations. How can this demand be dealt with and what are its positive and negative aspects? In our interview, Eleonora Quadri, Head of Quality and Risk Management at Pro Infirmis and lecturer in the CEPS CAS „Kommunikation & Wirkungsmessung in NPO“, talks about how her organization deals with this challenging topic.

**CEPS:** The demand for greater professionalization seems to be omnipresent in the nonprofit sector. To what extent is Pro Infirmis confronted with this demand?

**E.Q.:** For example, the change in the Code of Obligations on 1 January 2008 had a drastic impact, extending the regular audit requirement to large cooperatives and foundations. With this revision of the law, large nonprofit organizations were put on an equal footing with private companies in terms of accounting. Instead of the legal form, it is now the size that matters. This has led to a considerable increase in requirements.

On top of that, we now also meet strict requirements imposed on public sector service agreements or subsidies. For a number of years, we have felt a growing pressure to justify our existence. This is no doubt related both to the professionalization of public administration itself, as well as to the steady rise in social spending and the associated cost-saving efforts. Whereas key performance indicators used to be satisfactory in reporting, the emphasis is now increasingly placed on questions of impact and prioritization.



Eleonora Quadri, lic.phil., is a research associate to the management and responsible for quality/risk management at Pro Infirmis. In the CEPS CAS «Kommunikation & Wirkungsmessung in NPO» she lectures on the implementation of impact measurement.

**CEPS:** How does Pro Infirmis deal with this demand and in which areas does Pro Infirmis need/want to develop?

**E.Q.:** In the course of professionalization, Pro Infirmis has not only optimized its controlling procedures, it has also set up a risk and quality management system, among other things. In terms of management, we are set up like a private sector company.

Professionalization also relates to the manner in which services are provided or how we communicate with our stakeholder groups. Digitalization gives rise to new problems and opportunities. It is not

just our clients that have certain expectations and requirements but also other stakeholder groups, such as donors. And we, as a professional organization, must find out where our potential lies. Last but not least, we need to consider how we can better include people with a disability. After all, the demand for inclusion also requires us to actively embrace it.

**CEPS:** What are the positive aspects of this demand for greater professionalization?

**E.Q.:** It creates transparency and trust on the one hand, while boosting efficiency and effectiveness on the other. It's ultimately a question of credibility. That's also why the Zewo standards are so important – they provide a framework of reference and therefore also create comparability with other nonprofit organizations.

In addition, the nonprofit sector is increasingly able to position itself as a modern employer that attracts highly motivated and skilled employees, who in turn form the basis for professional management.

**CEPS:** What are the negative aspects of this demand for greater professionalization?

**E.Q.:** Professionalization is fundamentally a positive thing. One challenge is not to lose sight of your actual objectives and *raison d'être*. In the nonprofit sector, there is a very strong emphasis on meaningfulness. The different understanding of leadership therefore also implies a cultural change, and this requires time and resources.

**CEPS:** In its “economic barometer”, the CEPS has studied the biggest challenges currently facing NPO. In your opinion, what are the biggest challenges facing Pro Infirmis now and in the future?

**E.Q.:** One challenge is certainly the tension between our position as an organization providing private disability care on the one hand, and our demand for inclusion of people with disabilities in society on the other. People with and without disabilities

should be able to play as full a role as possible in society and should have access to education, work, culture, etc., without the need for special services for those with disabilities.

Another issue right now is the sustainable financing of our services. Many of these are failing to cover their own costs, and yet demand remains as high as ever. This also has to do with professionalization and the increased demands, which are driving up costs. At the same time, the available resources haven't necessarily kept pace with this increase.

As I mentioned earlier, the digital transformation also represents a challenge, although there is no clarity as to what it means for us yet.

**CEPS:** Many Thanks!

## CEPS INSIGHT

### DAS Diploma Ceremony

The CEPS would like to congratulate Irene Amstutz, Bettina Loustalot, Dr. Ursula Meyerhofer Fahlbusch, Stefan Rissi and Christian Thomas Schwarz on graduating from the DAS in Nonprofit Management & Law and wishes them all the best for their future.

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### Research by and with the CEPS

The CEPS can look back on a productive three months. The Swiss Foundation Report 2018 (in German/French) and the NPO Economic Barometer (in German) in the section „CEPS Research & Practice“, as well as an article by Prof. Dr. Georg von Schnurbein and Dr. Marybel Perez in the journal „American Behavioural Scientist“ were published. The CEPS has also been involved in the preparation of the Global Philanthropy Report and the Global Philanthropy Index.

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**From Basel Into the Wide World – With the GSE**

„Pioneers“ from various countries have applied to the CEPS for participation in the CAS Global Social Entrepreneurship. The selection process is underway – places for „Explorers“ are still available.

The third issue of the CAS Global Social Entrepreneurship (GSE) starts this autumn. In the context of this executive education, participants from Europe („Explorers“) meet project leaders from developing countries („Pioneers“) to jointly promote specific projects.

The 15 ECTS points CAS Global Social Entrepreneurship offers a unique training opportunity in the nonprofit sector – with a practical and international perspective. The highlight is the trip to the respective project countries and the further development of the selected projects on site. In this way, the knowledge and ideas developed in the online courses, seminars and meetings between „Explorers“ and „Pioneers“ will be employed firsthand.

**„Pioneers“ from Bangladesh to Peru**

Thanks to the support of the Botnar Foundation, the CEPS is able to award five scholarships to „Pioneers“ from developing or emerging countries. We have received numerous applications – from Bangladesh and Sri Lanka to Morocco and Egypt, Tanzania, Zimbabwe and South Africa to Peru, Colombia and Nicaragua. From these applications, five projects and

the corresponding project managers are currently being selected for participation in the GSE.

**„Explorers“ experience a new world**

„Explorers“ – experienced people from nonprofit organisations, foundations or companies – have the opportunity to use their existing and newly acquired knowledge to further develop projects on site in interesting countries. There are still places available in the GSE for „Explorers“. The CEPS is looking forward to further registrations.

Robert Schmuki

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**DID YOU KNOW?**

**100 Billion**

Swiss charitable foundations have total assets of almost CHF 100 billion. Since the last survey in 2012, the foundations' assets have increased by almost 30%. The average balance sheet total of a foundation amounts to CHF 8.2 million, with around 80% of all foundations having less than CHF 5 million in assets.

**#philcon18**

The 1<sup>st</sup> „Basel Convention on Philanthropy“ will take place in November 2018 and offers a varied program.



In the last few years, philanthropy has gained in importance and public awareness. Switzerland is playing a central role in this development as the headquarters of many international organizations, as a financial market handling large sums of money for philanthropic activities, and as a liberal state that allows activities to be conducted on a global scale.

Today, this development is shaped by influences from many sides – civil society, business, financial markets, science, and politics. In order to promote exchange between these stakeholders, the CEPS is organizing the 1<sup>st</sup> „Basel Convention on Philanthropy“ on November 19<sup>th</sup> and 20<sup>th</sup> 2018. The aim is to come together to discuss and develop ideas regarding the role of charitable work, methods for impact analysis, and the potential of networks and partnerships.

Participants can look forward to a varied program with top-flight keynote speakers, enthralling panel discussions, and plenty of scope for networking and exchanging ideas in World Cafés and un-conferences.

Sophie Hersberger

[www.philanthropyconvention.org](http://www.philanthropyconvention.org)

**CALENDAR**

**Executive Education (IN GERMAN)**

**CAS Kommunikation & Wirkungsmessung in NPO**

3 Modules – Spiez & Basel  
Start: August 20<sup>th</sup> 2018

**CAS Global Social Entrepreneurship**

5 Modules – Basel & project countries  
Start: August/September 2018

**Philanthropie am Morgen**

October 11<sup>th</sup> 2018 – Basel

**Intensiv-Lehrgang Finanzmanagement**

November 5<sup>th</sup> - 9<sup>th</sup> 2018 – Gunten

**Intensiv-Lehrgang Stiftungsmanagement**

March 18<sup>th</sup> - 22<sup>nd</sup>, 2019 – Sigriswil

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**FURTHER DATES**

**International Conference of ISTR  
International Society for Third-Sector  
Research**

July 10<sup>th</sup> - 13<sup>th</sup> 2018 – Amsterdam

**Basel Day of Foundations 2018  
stiftungsstadt-basel.ch**

August 28<sup>th</sup> 2018 – Basel

**European Day of Foundations  
tag-der-stiftungen.ch**

October 1<sup>st</sup> 2018 – Europe-wide

**EFC Research Forum Conference  
European Foundation Centre**

October 17<sup>th</sup> 2018 – Hanover

**Basel Convention  
Center for Philanthropy Studies**

November 19<sup>th</sup> - 20<sup>th</sup> – Basel

**LEGAL NOTICE**

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