



## Schöpflin Stiftung's Partner Survey

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28 June 2019

Wider Sense GmbH

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**Schöpflin** Stiftung:

# Executive Summary

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After four years of funding activity, the Schöpflin Foundation has reviewed its funding strategy and methodology; with the help of a partner survey, it has involved the funding partners in the process



A total of **82 institutions were selected for the survey** - 44 current and former funding partners (funded organizations), 17 rejected applicants and 21 critical friends (foundations and consultants). The results of the survey were generally positive. The response rate of 80.5% is above average. In addition to the online survey, in-depth telephone interviews were conducted with the Critical Friends.



The partner survey had the following **main focuses**: The organizations were able to contribute their assessment of internal processes and the administrative effort during the initiation, promotion and termination process. In addition, their perspectives on cooperation with their contact persons, further support services, and the strategy and impact of the Schöpflin Foundation were asked.



Feedback on the **type of support** and **direct cooperation with the contact persons** was particularly positive. Here the Schöpflin Foundation allows a great deal of room for maneuver and, in comparison to other foundations, is particularly **committed and acts in a spirit of partnership**.



Criticism has been voiced primarily in connection with the **process design of the initiation phase** of a potential sponsorship, the visibility of **further offers of support** from the Schöpflin Foundation, and the **transparency of decision-making between program managers and the Executive Board**. They also regard external communication and the presentation of the overall strategic orientation as capable of improvement.



The **locally anchored projects** of the Schöpflin Foundation are seen as particularly effective. **Mr. Schöpflin and his role as a benefactor** is also positively emphasized several times, although those surveyed were not asked about this either directly or indirectly<sup>1</sup>.

# Agenda

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- Initial situation & objectives
- Goals of a partner survey
- Procedure
- Key data of this partner survey
- Significance of a partner survey

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Analysis

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- Associations with the Schöpflin Foundation
- Conveyor initiation
- Funding phase
- Strategy, impact & communication

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Trends

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- Trends in the foundation sector from the perspective of the critical friends

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# Initial Situation and Goal

The Schöpflin Foundation sees itself as a learning foundation; a partner survey helps to better understand the external perception of its own funding practice

## Initial situation

- After approximately four years of funding activity, **the Schöpflin Foundation would like to review its funding strategy and methodology**
- In the course of this, the Foundation would like to analyze its current funding portfolio and define **the next steps**
- The current strategy review offers a good opportunity to involve funding agencies and their feedback in the process by means of a **partner survey**
- At the request of the Foundation, **Critical Friends** with whom the Foundation works closely (in particular other foundations and consultants - hereinafter referred to as "Critical Friends") should also be surveyed

## Order target

- Design and implementation of a partner survey with the following three groups:
  - a. Current and former funded organizations
  - b. Rejected organizations that have applied for funding
  - c. Critical Friends
- Preparation of the **final results report**, including the **derivation of recommendations** for the strategic development of the Schöpflin Foundation

# Goals of a Partner Survey

The partner survey serves the further development of a foundation and its strategy as well as the expansion of the trusting and constructive cooperation with its funding partners

Document impact



- Documentation of the external effects of an organization, program or intervention
- Basis for further analysis and adaptation

Test hypotheses



- Validation of (impact) hypotheses and thus development of a clear vision for the design of funding practice (including focus, funding period, additional support offers)

Identify weaknesses



- Identification of weaknesses in the strategy as well as in the communication of strategies
- Identification of undesirable developments and appropriate response

Understanding needs



- Better understanding of the needs and challenges of the beneficiaries
- Better understanding of needs that are not yet covered

Living participation



- Feedback from funding partners on application, reporting and evaluation processes
- Improving cooperation and communication

Build confidence



- Potential strengthening of trust on the part of the funding partners
- Expansion of responsible cooperation and mutual constructive interaction

# Significance of a Partner Survey

The vast majority of Critical Friends are very positive about the implementation of a partner survey; one voice believes that respondents who report positive results will be specifically selected

## Reactions of the Critical Friends

*„Essence should be published to show they're doing this.“*

*„I think it's good that cooperation partners are also questioned.  
I experience this for the first time in this form.“*

*„It is certainly sensible to critically examine one's own  
processes again and again, no question at all.“*

*„Excellent and progressive, a 360-degree survey, that's why  
I also let myself be surveyed.“*

*„We conduct Grantee Perception Reports on a global scale.“*

*„I love it; I've never done this before and I'm looking forward to the results.“*

*„Shows the willingness of the Schöpflin Foundation to learn, even thought about it.  
Anonymous procedure required. Helpful and courageous.“*

*„In any case a sensible means, sovereign and professional.“*

*„If it's not the only thing, it's a good instrument.“*

*„I don't know how helpful this is. I got the impression that the foundation wanted my  
opinion because I would give positive answers. I had the experience of one more  
foundation and survey and the foundation did not improve after the survey.“*

## Classification

- The Critical Friends of the Schöpflin Foundation rate the implementation of a partner survey very positively. In order to ensure that the results are meaningful, the following aspects must be taken into account:
- Anonymization of data is indispensable in order to give participants a comparatively safe space to express critical aspects of cooperation.
- Tailoring the survey to the individual foundation, as in the case of the present partner survey, enables a foundation to obtain very detailed feedback.
- However, the partner survey instrument should not be the only format for obtaining feedback from funding partners. The results of the partner survey can thus be better assessed with the internal knowledge of the quality of the cooperation.

# Procedure

The project is divided into five phases; phases 1 to 3 are carried out in close cooperation between the Schöpflin Foundation and Wider Sense



- Kick-off workshop with the Schöpflin Foundation to define the focus of interest
- Joint selection of the actors to be interviewed
- Development of a catalogue of questions for the online survey in consultation with the Schöpflin Foundation
- Development of an interview guide for the telephone interviews with the group of Critical Friends
- Online survey using the online-based software *Survey Monkey*
- 18 guideline-based telephone interviews with selected Critical Friends
- Excel-based evaluation of the quantitative online survey while maintaining anonymity
- Content evaluation of the qualitatively collected data
- Analysis and summary of the results
- Strategic recommendations for the further development of the Schöpflin Foundation
- Presentation of the results on site

# Key Data on the Partner Survey

With a response rate of around 80%, participation in the partner survey of the Schöpflin Foundation was very high

## Content structure

- The present evaluation presents the results of the partner survey. The content is based on the structure of the online survey and is structured as follows:



- The evaluation is based on the responses to the online survey and telephone interviews with 18 critical friends.
- The answers of the respondents were filtered selectively, e.g. according to program area or type of funding.

44 Current and former funding partners (funded organizations)

17 Rejected applicants

21 Critical Friends

**Response Rate**

**Total: 80.5%**

Funding Partners: 88.6 %	39/44 Replies
Rejected Applicants: 52.9%	9/17 Replies
Critical Friends: 85.7%	18/21 Replies

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# What makes the Schöpflin Foundation different?

Compared to others, the majority of the feedback describes the Schöpflin Foundation as being particularly committed, granting great freedom of action and oriented towards partnership

## Engaged

„They really want something!“

*"genuine interest in getting things done together"*

*"from short-term funding to long-term thinking"*

*"takes a political stand"*

*"Willingness to take risks "*

*"The way the foundation promotes is already making an impact."*

*"Advance organizations in processes."*

## Scope for design

*"Open-minded approach, sometimes unconventional."*

*"It's great to have such a foundation: open, alert, present, accessible, supportive of unpleasant decisions."*

*"Open to funding formats that do not yet exist, curious, solution-oriented."*

*"Attitude that grantees should co-develop a grant"*

*"The cooperation is less complicated compared to other funding agencies. The accessibility is better. The Schöpflin Foundation is more flexible."*

*„Trustful cooperation, we agree together on how to present ourselves to the funding partner".*

*"Project level: Open approach, many questions to possible funding partners"*

*"You have the courage not to retreat behind any standards."*

*"Foundation that wants to make things happen, sometimes breaking with conventions."*

## Partnership

*"They meet you at eye level."*

*"Does not claim the sovereignty of definition, but allows those receiving funding to help shape the cooperation."*

*"Schöpflin Foundation creates a bond."*

*"little top-down"*

*"unbureaucratic"*

*„Have a mutual interest in the work, develop things together"*

*"not defining or pressuring"*

*"a non-bureaucratic, focused and entrepreneurial funding"*

*"cooperative, partnership-based"*

*"mutually appreciating, taking others seriously"*

# The founder Hans Schöpflin

The Critical Friends have several times positively emphasized the founder Hans Schöpflin, although they were neither directly nor indirectly asked about Mr. Schöpflin during the telephone interview

## View of the Critical Friends

*"Mr. Schöpflin, who thinks entrepreneurially, is very helpful."*

*"Many positive things come from the founder's personality."*

*"Foundation has a very authentic benefactor."*

*"Mr. Schöpflin came by personally, this was received very positively (business-wise & psychologically)."*

*"Hans Schöpflin stands for the interesting interface between business and not-for-profit."*

*"Mr. Schöpflin's personal communication is perhaps more important: The inspirational effect here would probably be greater than that of the foundation. Schöpflin could use his 'brand' more - he can be an important role model (and ambassador for Germany)."*

*"... also difficult, if in the management board round again large questions are raised, which question the agreed upon conditions - creates confusion and uncertainty with the promotion partner and is in certain respects actually a breach of confidence."*

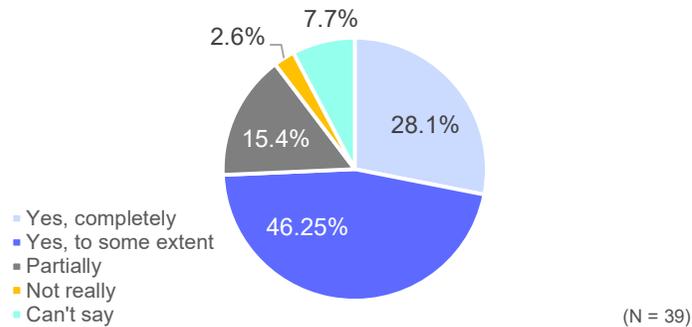
- Mr. Schöpflin, "the figure of the living founder", helps shape the perception of the Schöpflin Foundation. The Critical Friends perceive Mr. Schöpflin as an "authentic and political benefactor", who brings his way of working as an investor into the foundation and enriches the foundation with his entrepreneurial thinking and acting.
- From the point of view of the Critical Friends, Mr. Schöpflin could communicate his experiences as a benefactor more strongly to the outside world.
- From the point of view of Critical Friends, decision-making processes at board level are not always transparent and comprehensible.

# FUNDING INITIATION

# Funding Initiation (1/2)

The overall picture is positive, with only occasional need for improvement; participants with successful applications gave better ratings than rejected candidates

F1: Was the process of initiating the funding transparent, i.e. were you aware of how the further internal processing would proceed?<sup>1</sup>



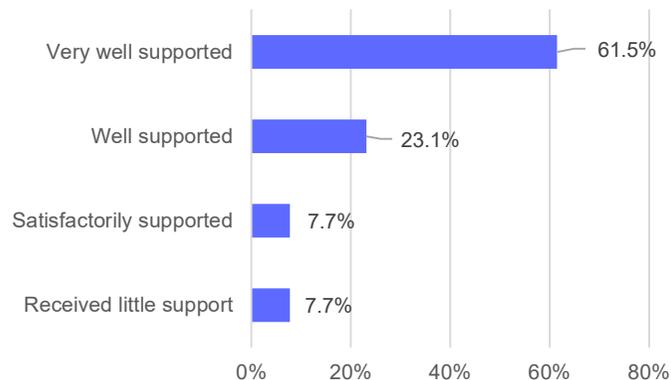
*"I felt well guided and supported from the beginning."*  
Quote from a funded organization

## Evaluation:

In the phase "Funding Initiation" the feedback from the funding partners is generally good. The overwhelming majority of the funded participants knew how the foundation's internal processing was going.

The picture is different for participants who did not apply for funding. About 62% stated that they did not (37%) or only partially (25%) have clarity about the application process.

F2: Did you feel supported by the Schöpflin Stiftung during the funding initiation?<sup>1</sup> (N = 39)



*"process has been very long and unclear on milestones and deliverables."*

Quote from a funded organization

*"We would have liked more support in the joint formulation of the grant agreement (instead of simply having it specified by the Foundation)."*

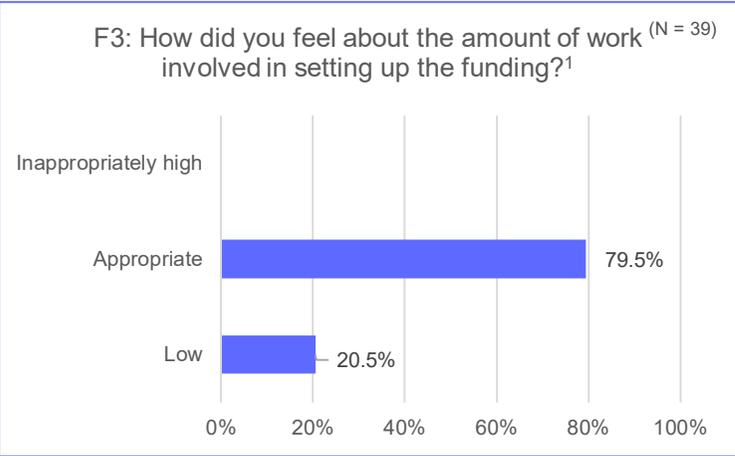
Quote from a funded Organization

## Evaluation:

- The Foundation's support in initiating funding is consistently rated as very good by the funding partners.
- Among those who were rejected, half felt well supported by the foundation. At least 25% did not feel supported.
- Both groups criticized the sometimes long decision-making processes.

# Funding Initiation (2/2)

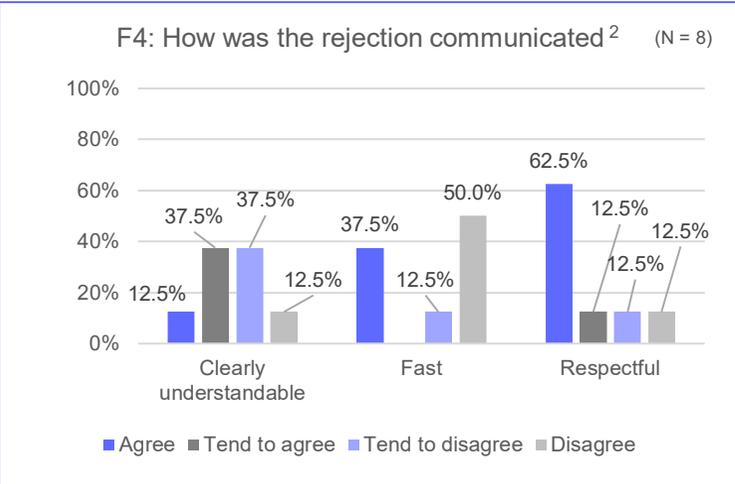
The Foundation receives a top rating in the assessment of the amount of work required for an application; however, there is a need for optimization in the management of cancellation times



*"Absolutely professional and cooperative cooperation that cannot be improved."*  
 Quote from a funded organization

**Evaluation:**

- The administrative workload was considered reasonable by both funded (80%) and rejected applicants (88%). This may be due to the amount of funding - the higher the amount of funding, the more appropriate the workload was assessed.
- This clearly positive feedback is remarkable and unusual for the sector. In contrast, complaints about relatively high administrative requirements that hinder the applicants' work in terms of content are common.



*"One should at least know that one is in a 'process of initiation' or could be rejected."*  
 Quote from a rejected organization

**Evaluation:**

- The foundation's cancellation management received neutral to positive feedback. Over 60% stated that the rejection was appreciative.
- The greatest need for improvement can be seen in time management: 50% of the participants stated that they had not been promptly informed of their rejection.

1: Response results of the funded organizations.  
 2: Response results of the rejected organizations.  
 3: Internal targets can be useful for the appropriate communication of rejections: e.g. sending rejections within 10 days etc.

# Supplements from phone interviews with Critical Friends

The majority of the statements made by the respondents coincide with the positive results of the online survey; at the same time they point to the need for improvement in operational management

## Professionalism and operative Management

- **Expectation management:** The Schöpflin Foundation was perceived as very constructive during the initiation phase. The friendly and motivating appearance was both beneficial and misleading. Some of the applicants thought they were on the road to success and were astonished about a rejection.
- **Binding agreements:** From the point of view of the funded organizations and Critical Friends, decision-making processes were sometimes perceived as unpredictable or lengthy. One reason for this was that the program managers were not always able to make decisions in every situation. This led to uncertainty and irritation. In some cases, for example, deadlines were set by the Schöpflin Foundation and later postponed. In another case, agreements were again called into question ex-post by the Foundation.
- **(Un)bureaucratic practice:** From the perspective of the Critical Friends, the structures of the Schöpflin Foundation have become significantly more bureaucratic. On the one hand, this is seen as a positive development, because processes are becoming clearer, on the other hand, it is also seen negatively by some, because potential funding partners have to make more effort to obtain funding.

*"I didn't realize I was in the middle of an initiation process."*

*Quote from a rejected organization*

*"... also difficult if major questions are raised again on the board level which call into question the agreed status."*

*Quote from a Critical Friend*

*"Quicker concrete statements on possible funding amount."*

*Quote from a funded organization*

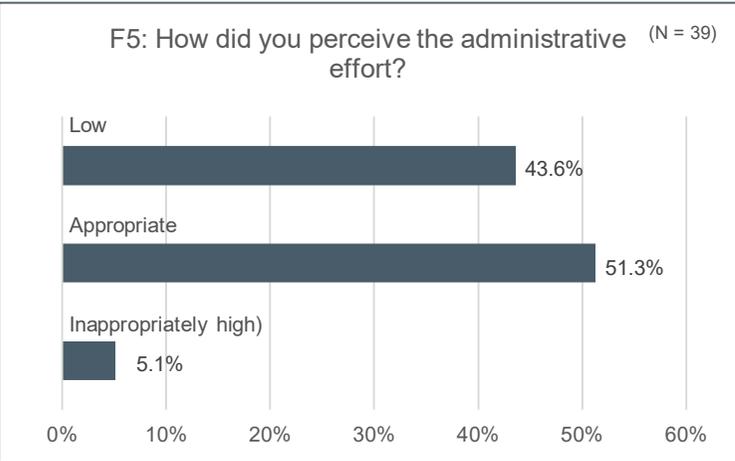
*"In the second funding period, the deadlines were not clear when decisions would be taken - we would like more clarity there."*

*Quote from a funded organization*

FUNDING PHASE

# Perception of the administrative effort (1/2)

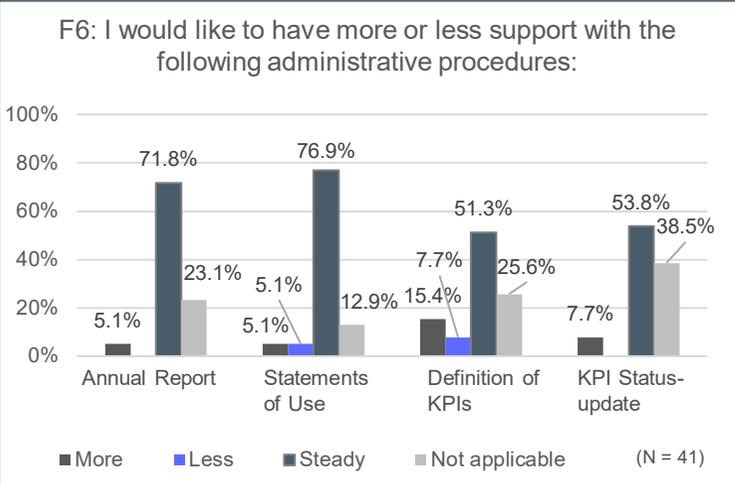
The interviewed funded organizations assess the administrative effort during the funding period as appropriate; the majority of them do not request more support from the Foundation



*„The effort was high - in part rightly so - but in part the program director was also not aware enough of the additional work he was creating".*  
*Quote from a funded organization*

**Evaluation:**

- The vast majority of the funding partners perceive the administrative effort during the funding phase as "low" to "appropriate".
- Only 5% of the respondents describe the effort as high.
- A look at F6 shows that not all funding partners have the same administrative burden. It may be that funding partners who have to submit several documents rate the administrative effort as higher.



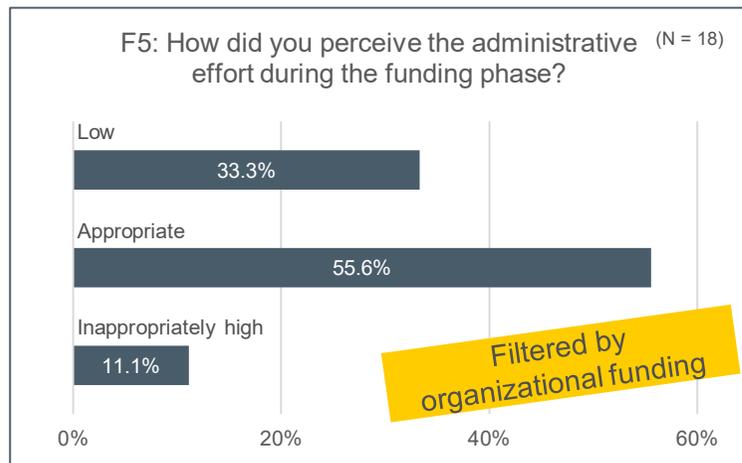
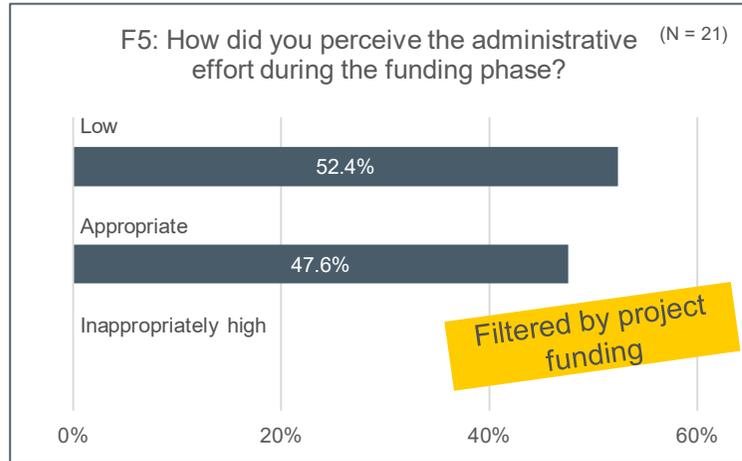
*"Support is not always good. What is important, for example, with KPIs: more continuity!"*  
*Quote from a funded organization*

**Evaluation:**

- For all the administrative elements surveyed, the majority of the funded organizations show satisfaction with the current level of support from the Foundation.
- They would particularly like to see more support for the KPI1 status update (8%) and the definition of KPIs (15%).
- From the open responses it is sometimes clear that the quality of support varies.

# Perception of the administrative effort (2/2)

Partners receiving organizational funding perceive the administrative effort to be higher than those receiving project funding



*„In der zweiten Förderperiode waren die Termine nicht klar, wann Entscheidungen getroffen“  
In the second funding period, the deadlines were not clear when decisions would be taken - we would like to see more clarity there.“*

*Quote from a funded organization*

*“A lot of extra work that wouldn't otherwise have been necessary.“*

*Quote from a funded organization*

## Evaluation:

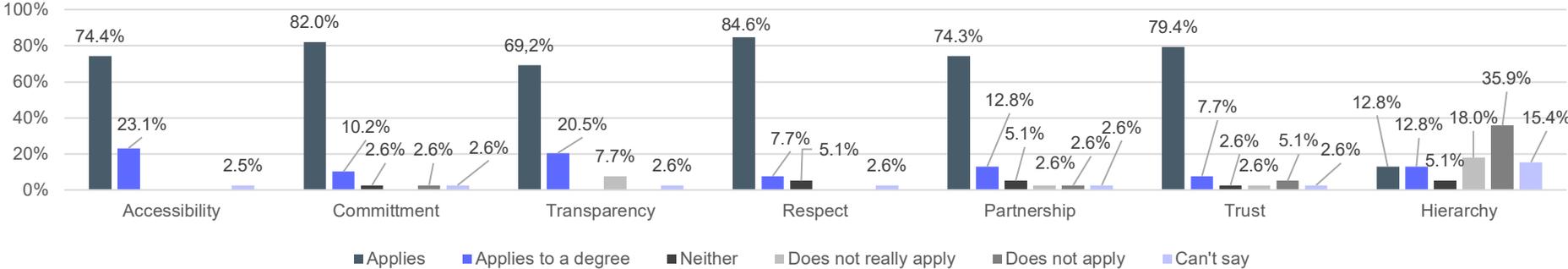
- A look at the filtered assessment of project funding and organizational support in terms of the administrative work involved in the funding phase reveals a somewhat differentiated picture.
- While project-funded organizations perceive the workload as "low" or "appropriate", 11% of organizations receiving organizational funding say that the workload is unreasonably high.
- On the whole, the amount of work for the funding partners can be described as reasonable.

# Co-operation

The majority of the organizations receiving funding rate their cooperation with the Schöpflin Foundation positively and regard it as appreciative, binding and trusting

F8: The co-operation with your direct contact(s) at the Schöpflin Stiftung is characterized by:

N = 39



*"High interest; reciprocal exchange; repeated joint reflection and consultation on project issues; very constructive joint discussions."*

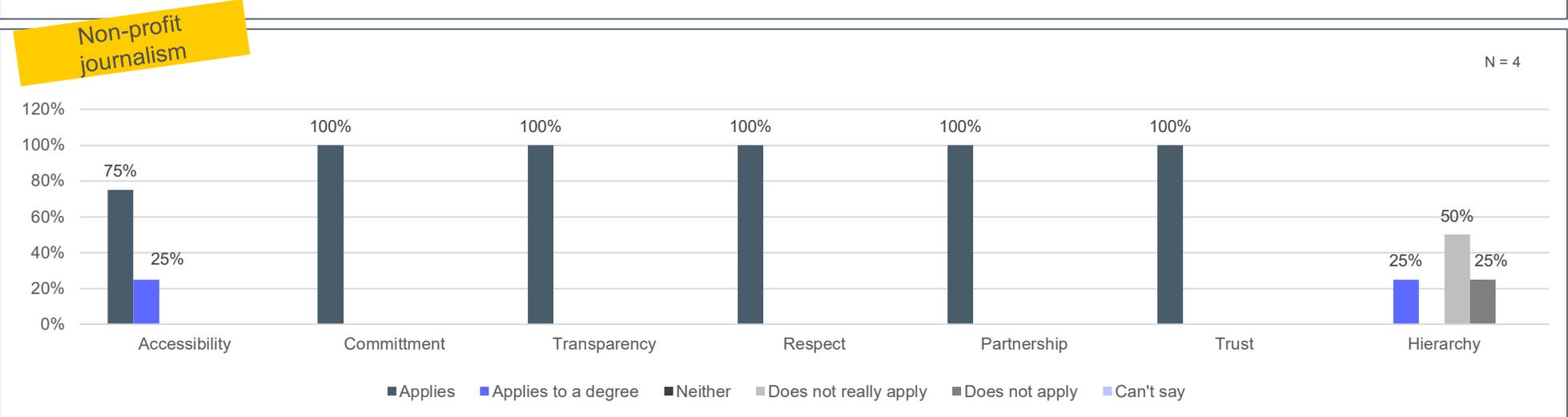
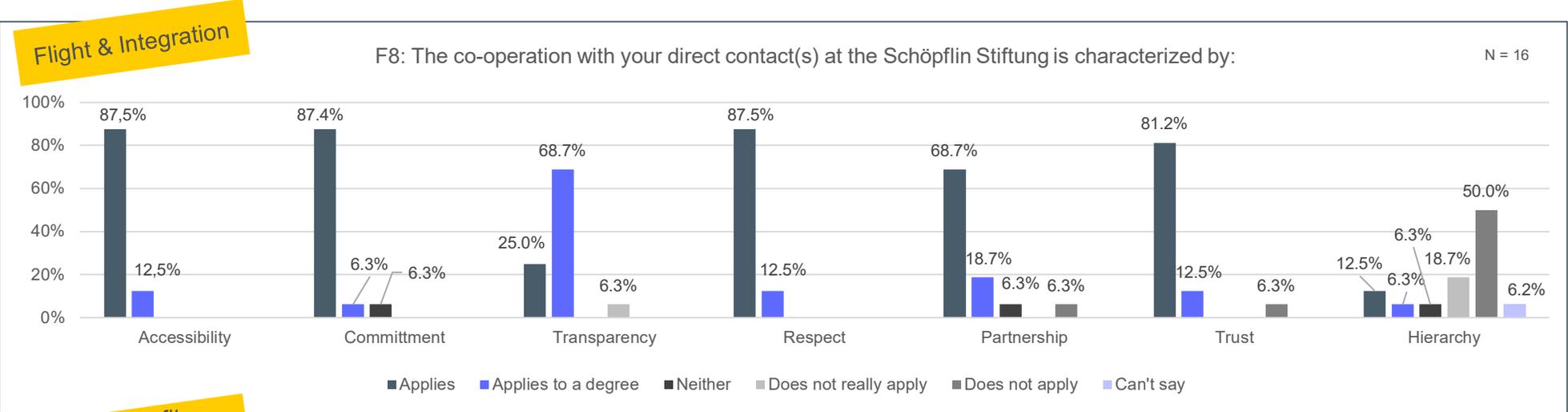
*Quote from a funded organization*

**Evaluation:**

- The terms "appreciation", "commitment", "trust", "good accessibility" and "partnership" are rated by 74% to 85% of respondents as an accurate description of the funding relationship.
- The aspect "transparency" is rated somewhat more cautiously. This feature is rated as accurate by 69% of the organizations.
- The result for the characteristic "hierarchy" is more mixed. 36% of respondents state that the relationship is not hierarchical. However, a total of 26% state that the relationship is hierarchical (13% say "applies", 13% say "applies to a degree").

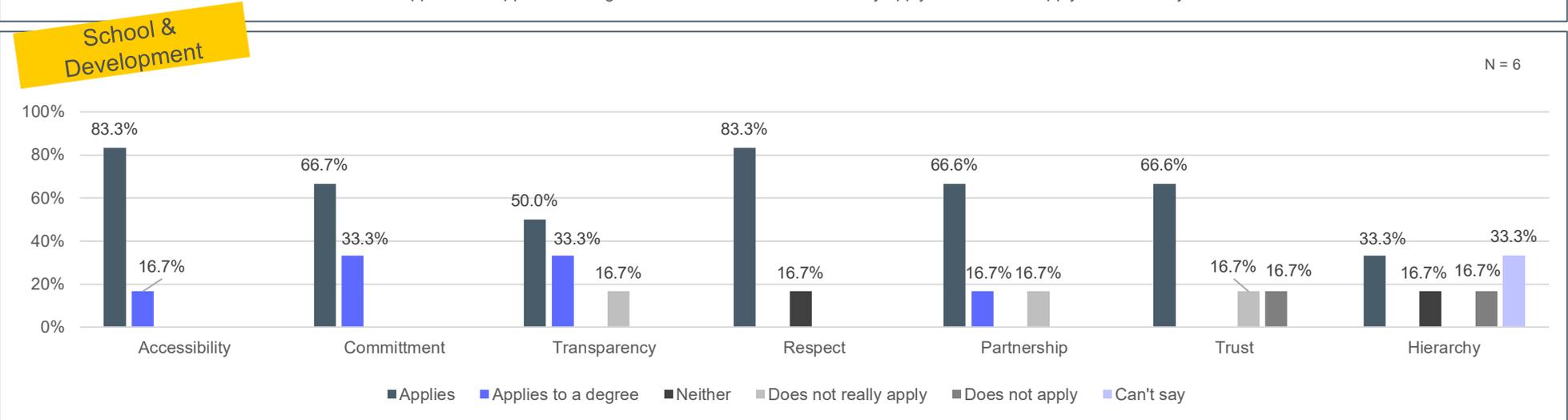
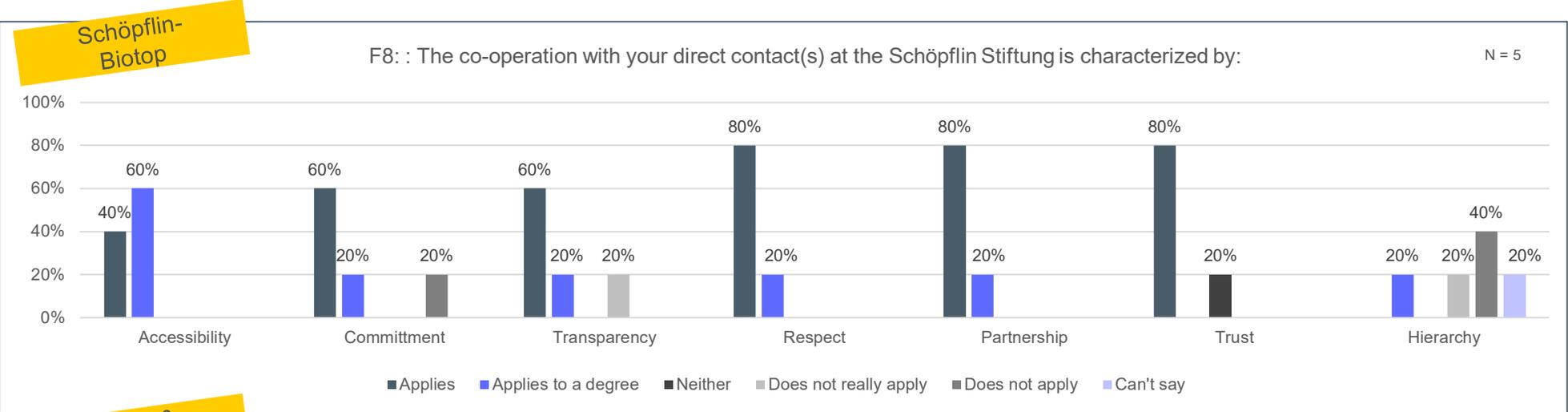
# Co-operation by program area (1/3)

In the program area "Flight & Integration", transparency in cooperation is rated lower than in other areas; "non-profit journalism" shows consistently positive evaluations



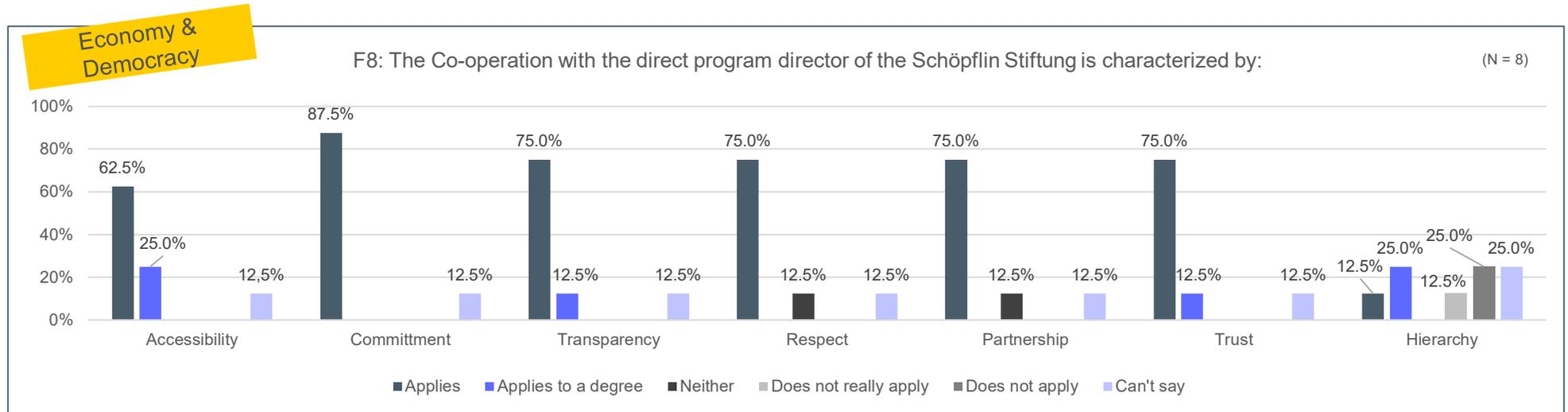
# Co-operation by program area (2/3)

In the "Schöpflin Biotop" area, accessibility is rated lower than in other areas; in "School & Development", hierarchy in cooperation is perceived comparatively strongly



# Co-operation by program area (3/3)

38% of the respondents in the program area "Economy & Democracy" perceive the cooperation as hierarchical; the commitment in this area is rated relatively high



„Mehr Nachfrage und Gestaltungsoption durch den Partner, weniger Pflichtentwicklung nach Maßgabe der Stiftung und als Bedingung für Förderung.“

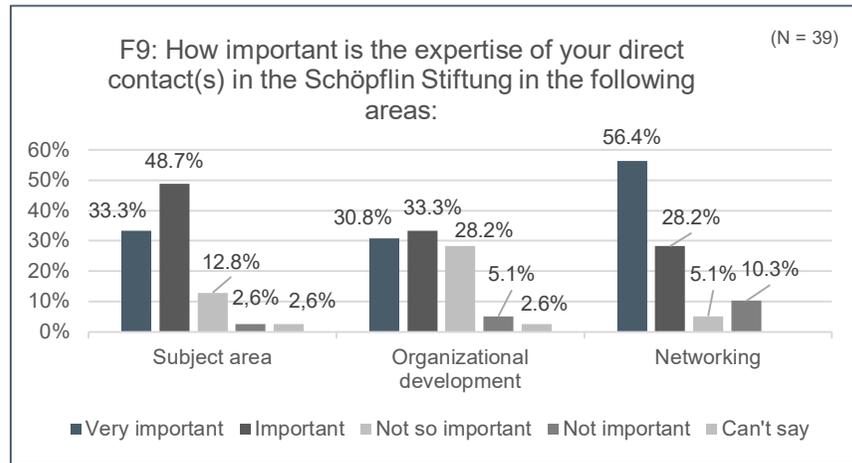
Zitat einer geförderten Organisation

## Evaluation:

- Also when looking at the individual contact persons per program area, the overall picture is positive. The majority of the interviewees describe the cooperation with their program director as particularly appreciative. Furthermore, the accessibility of the contact persons is described as consistently positive.
- Again, the assessment of the hierarchy in cooperation shows a mixed picture.
- The same applies to the aspects "transparency", "partnership", "commitment" and "trust". Nevertheless, the result in these areas is quite positive.

# Co-operation (1/3)

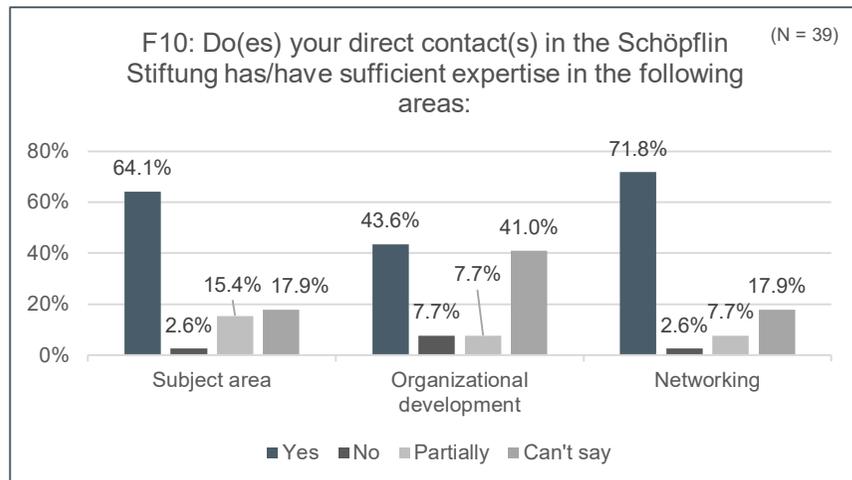
The expertise of the Schöpflin Foundation is very important for funding partners in building and maintaining their own network



*"Greater decision-making scope on the part of the specialist contact persons at Schöpflin (free budgets) during ongoing funding."*  
Quote from a funded organization

### Evaluation:

- Funding partners rate the expertise of their respective contact persons as "very important", especially in networking.
- In the areas of their own thematic field and organizational development, the expertise of the contact person is "rather important".
- In the open answers, the wish is again expressed that the contact persons should have more freedom of decision.



*"Irrespective of whether expertise is available in the subject area, the Foundation should have confidence in the funding partner that he/she knows what he/she is doing."*  
Quote from a funded organization

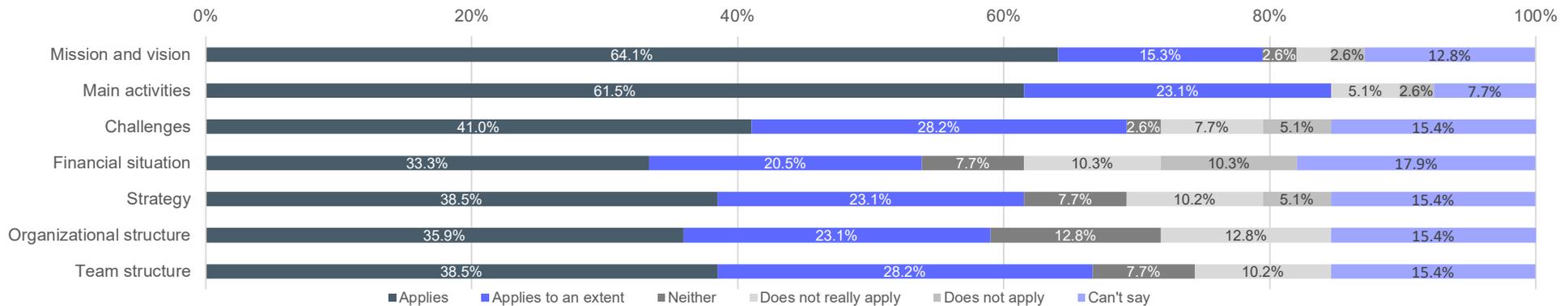
### Evaluation:

- The expertise of the relevant contact persons at the Schöpflin Foundation is rated positively overall by funded organizations. Just under 70% of the respondents locate expertise in networking among their contact persons.
- The area of organizational development receives approval from 44% of the organizations supported

# Co-operation (2/3)

The contact persons are generally attested to have a profound understanding of their funding partners; the knowledge of the commercial situation is particularly expandable

F11: Do you think that your direct contact(s) do(es) have a profound understanding for the following areas of your organization: (N = 39)



*"Question mark whether the range of experience of program managers is broad enough to provide content support in all areas".*

*Quote from a Critical Friends*

## Evaluation:

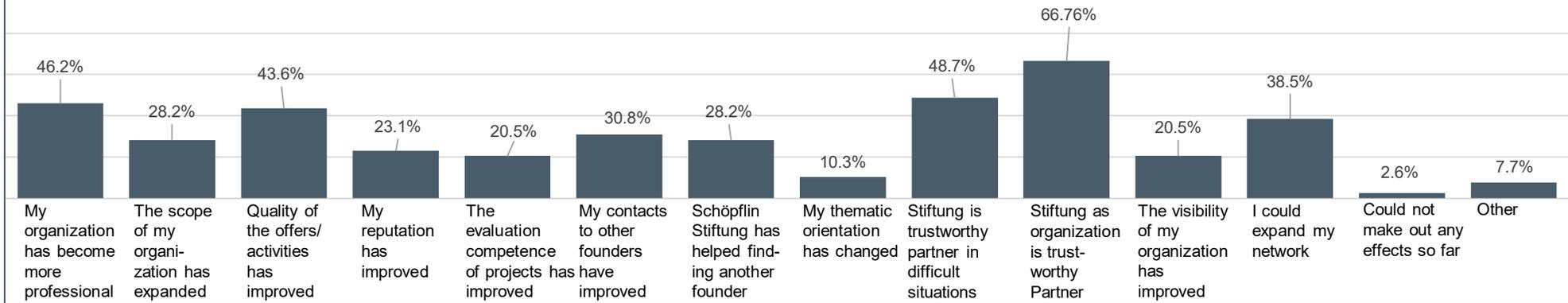
- The respective contact persons have a very good general overview of "main activities", the "mission and vision".
- Even with "current challenges", "strategy and team structure", between 60% and 70% of the respondents attest to a profound understanding of their respective contact person.
- With regard to knowledge about the "commercial situation", the picture is mixed - 20% rate the knowledge as little or non-existent, 18% cannot assess this. This indicates that in direct talks with funding partners the commercial situation is spoken about less often. The reasons for this can be different; e.g. if the contact person does not have sufficient commercial knowledge to ask about it, the funding partner does not dare to talk openly about the commercial situation or the social effect for both sides is in the foreground etc.

# Co-operation (3/3)

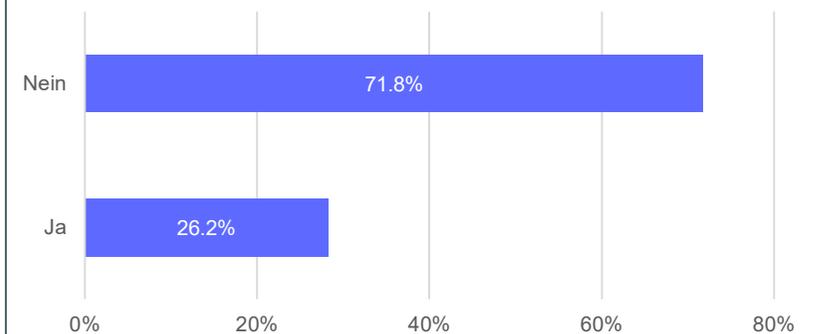
Significant effects beyond funding can be seen in professionalization and quality improvement; less noticeable are effects in visibility and access to donors

F18: Which effects has the co-operation with Schöpflin Stiftung had beyond the funding? (multiple answers possible)

(N = 39)



F17: Have you ever done anything because you were under the impression that it was expected by the Schöpflin Stiftung? (N = 39)



## Evaluation:

- 97% of the respondents notice a direct effect through the cooperation with the foundation.
- Almost half of the funding partners say that their organization has become more professional and the quality of their services has improved.
- It is also very positive that only 10% of those surveyed say that the thematic focus has changed.
- The cooperation has a much smaller effect on the reputation and visibility, which could have something to do with the Foundation's external communication, which has been rather reserved up to now.

# Phone interviews with the Critical Friends - additions

The Critical Friends take a positive view of the Schöpflin Foundation's understanding of partnership; however, they call for more transparency and early clarity in decision-making

## Openness and willingness to experiment

- **Cooperation between funding partners and the Schöpflin Foundation:** Critical Friends emphasize the appreciative and open attitude of the Schöpflin Foundation towards its funded organizations. They acknowledge that the Foundation tries to shape a partnership at eye level - despite the inherent power gap in the funding relationship. Isolated critical voices express the view that the support of the funded partners sometimes leads to "micro-management". This leads to a higher burden on the funding partners and limits their freedom of decision.
- **Triangular relationship:** According to the Critical Friends, the effort and results of the special triangular relationship between consultants, the Schöpflin Foundation and its funding partners are in a good relationship. Many stress that transparency is the prerequisite for this relationship to function.
- **Cooperation with Critical Friends:** Critical Friends generally evaluate the cooperation with the Schöpflin Foundation very positively. They highlight the open, constructive, professional and innovative attitude of the Schöpflin Foundation. They appreciate the regular personal exchange within the framework of existing co-operations or on an informal level. Many of the interviewees can imagine further, more in-depth cooperation on common issues - also with the assumption that together we can achieve more impact and take a pioneering role. Critical remarks are mentioned in the context of ongoing cooperation. Some respondents would like to see a clear decision on the continuation of projects at an early stage.

*"An early and clear decision on the continuation of a jointly financed project by the Schöpflin Foundation would be helpful for our own planning and internal communication with the Executive Board."*

*Quote from a Critical Friend*

*"The Schöpflin Foundation does not seem to take proper care of consultants in some cases because the capacities are not there: So they have not been able to take the knowledge of the consultants with them sufficiently for other projects."*

*Quote from a Critical Friend*

# Suggestions for improvement

From the perspective of the funding partners and Critical Friends, the Schöpflin Foundation could improve the following in its cooperation:

*"The contact persons should ideally have their own start-up experience in the non-profit sector."*

*Quote from a funding partner*

*"The contact persons should adopt a coaching rather than an 'encroaching' counselling attitude."*

*Quote from a funding partner*

*"Communicate more clearly what the Foundation is doing in the various program areas so that we know where we can cooperate if necessary".*

*Quote from a Critical Friend*

*"Open application rounds - projects have a say in the strategy and objectives of the foundation."*

*Quote from a Critical Friend*

*"Greater scope for decision-making on the part of the specialist contact persons at Schöpflin (free budgets) during ongoing funding."*

*Quote from a funding partner*

*"Sufficient lead time for important deadlines and dates."*

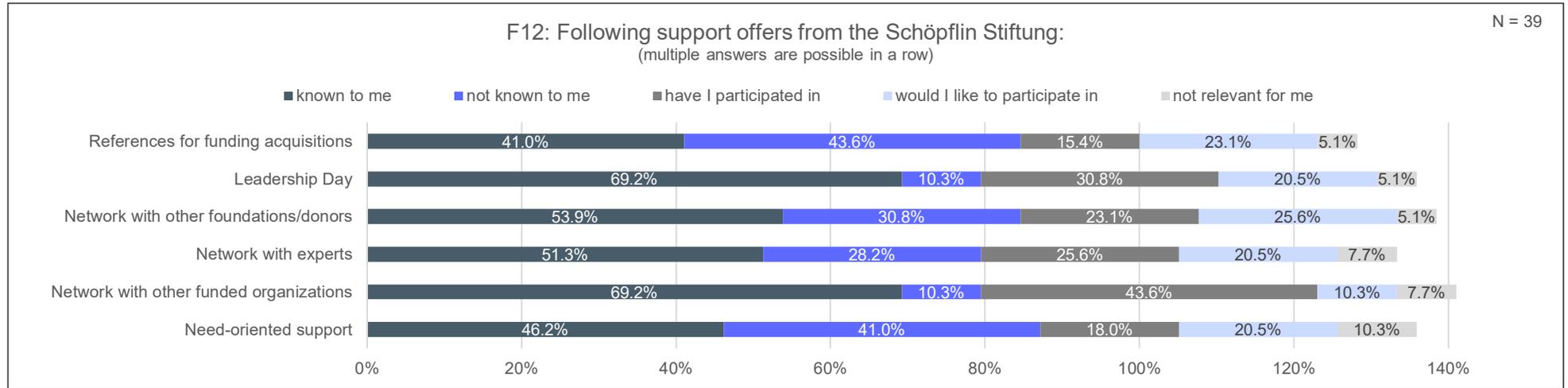
*Quote from a funding partner*

*"Knowledge of nonprofit law is particularly important to us."*

*Quote from a funding partner*

# Capacity Building (1/3)

About 40% of the funding partners are not informed about needs-oriented support offers by the Schöpflin Foundation



*"The Schöpflin Foundation should proactively make it known to every recipient of funding that these offers exist, as a catalogue, so to speak."*

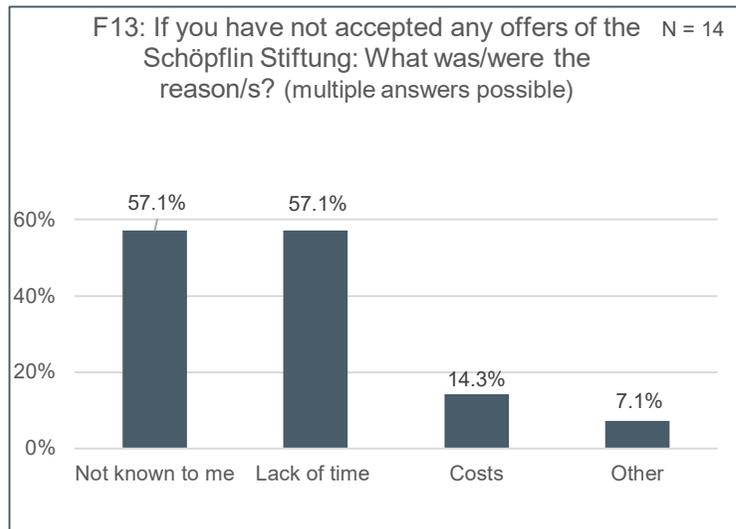
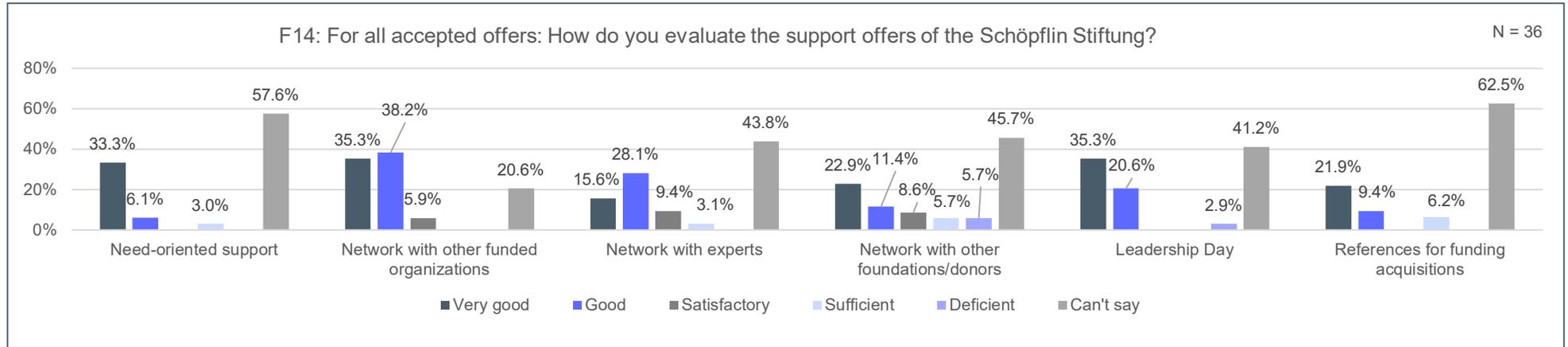
*Quote from a funded organization*

## Evaluation:

- Around 70% of the current and former funding partners surveyed are aware of the Schöpflin Foundation's "Leadership Day" and the opportunities for networking with other funded organizations through the Foundation. 31% and 44% of those surveyed have already taken advantage of these offers.
- A different level of knowledge is revealed with regard to the topic of "demand-oriented support offers". While 46% of the respondents are informed about these offers, 41% of the funding partners are not aware of these possibilities. 21% of the respondents are interested in taking advantage of them, while 10% do not consider these forms of support to be relevant. This result can probably be justified by the type (project vs. organization support) and duration of the funding relationship.
- The Schöpflin Foundation is less visible to its funding partners as a "reference point for the acquisition of funding". 44% of the funded organizations are not aware of this possibility.

# Capacity Building (2/3)

The main reasons for not taking part in the Schöpflin Foundation's offers of support were lack of information and limited time resources



*"When networking with other foundations, hold discussions together with the funding partner and not just talk about him or keep him out of the picture".*

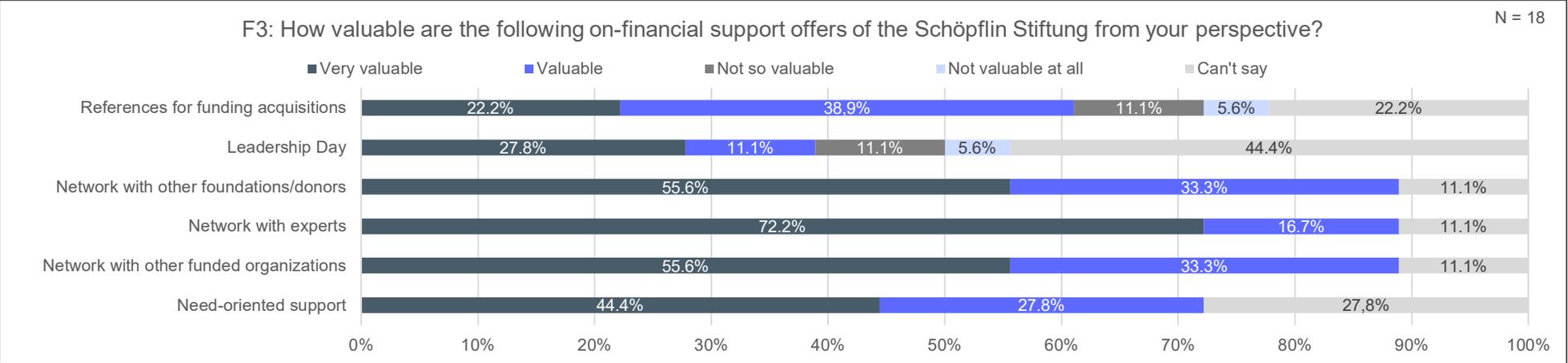
*Quote from a funding partner*

### Evaluation:

- A lack of knowledge and limited time resources prevent almost 60% of the funding partners from taking advantage of the support offered by the Schöpflin Foundation. Accordingly, the majority of those surveyed cannot assess the quality of the offers.
- In general, the participating organizations rate the support services positively.
- A small percentage of those surveyed (3-6%) sees significant potential for improvement in the various networking offers by the Foundation.

# Capacity Building (3/3)

The majority of the Critical Friends of the Schöpflin Foundation surveyed consider non-financial support to be "very useful" or "useful".



*"Expansion of the network of experts on questions of financing and organizational consulting."*

*Quote from a Critical Friends*

**Evaluation:**

- Especially the networking with other foundations/investors, experts as well as funded organizations is considered by almost 90% of the interviewed Critical Friends as "very useful" or "useful".
- The demand-oriented support services are also judged to be "meaningful". However, it is clear from the supplementary telephone interviews that not all Critical Friends are of the opinion that the Schöpflin Foundation should offer a standardized support program for its funding partners, as the need for support can be very individual for each organization. In addition, some Critical Friends suggest that there are already a variety of support services available for non-profit organizations, such as accelerator programs etc.
- Other Critical Friends, on the other hand, could very well imagine offering their support partners to participate in capacity building offers.

# Phone interviews with the Critical Friends - additions

The Critical Friends see a need for support from the funding partners and welcome the Foundation's offer; it should take greater account of the individual needs of the funding partners

## Trust and Realism

- **Seek the conversation:** In general, the Critical Friends of the Schöpflin Foundation welcome capacity building measures. In discussions, however, it is repeatedly stressed that every organization has individual support needs. Further offers for organizational development should therefore always be tailored to these specific needs. Thus, an open and trusting dialogue with the funding partner is crucial.
- **Healthy realism:** According to statements by cooperating foundations and consultants, financing their own activities is always the top priority for funded organizations. Therefore, as a foundation, one has to ask oneself the critical question whether further offers of support by the sponsor are voluntarily accepted by the organizations. Here, too, an open and trusting discussion at eye level is needed, in which the funding partners honestly articulate their actual needs. This is only possible if the program managers act as coaches and not as consultants. The latter can be understood by funding partners as patronizing behavior.
- **Effective implementation:** Critical Friends of the foundations see a need for support on the part of the funded organizations in a broad thematic spectrum. Offers could, for example, be used to find suitable personnel, questions about generational change or the topics "digitalization and democratic participation". In the case of network offers, the term "network" must be directly linked to specific contact persons in order to bring added value to organizations. In addition, the suggestion was made that the Schöpflin Foundation should cooperate with external providers or other foundations in the area of "capacity building" in order to avoid building parallel structures to existing offers.

*"Willingness to talk about it is good, but evaluation is difficult, because it is possible that non-financial funding does not even get to the really relevant issues, because funding organizations either do not know themselves and cannot articulate what they need, and there must also be a great relationship of trust between the foundation and the funding organization, so that the latter can openly say where the shoe really pinches."*

*Quote from a Critical Friend*

# Suggestions for improvement

From the perspective of the funding partners and Critical Friends, the Schöpflin Foundation could improve the following in the area of capacity building:

*"Conduct Leadership Day in an easily accessible, central location."*

*Quote from a funding partner*

*"Don't make any more time-sensitive offers you have to comply with out of obligation."*

*Quote from a funding partner*

*"Proactively publicize capacity building offers to every funded person, as a catalogue, so to speak."*

*Quote from a funding partner*

*"It would possibly be an additional support if Schöpflin were to establish contacts with universities and political decision-makers on his own initiative in order to draw attention to well-run projects from outside and to ask how sustainability can be ensured."*

*Quote from a funding partner*

*"More demand and design option by the partner, less obligation development in accordance with the foundation and as a condition for funding."*

*Quote from a Critical Friend*

*"Assistance in finding follow-on financing after project completion"*

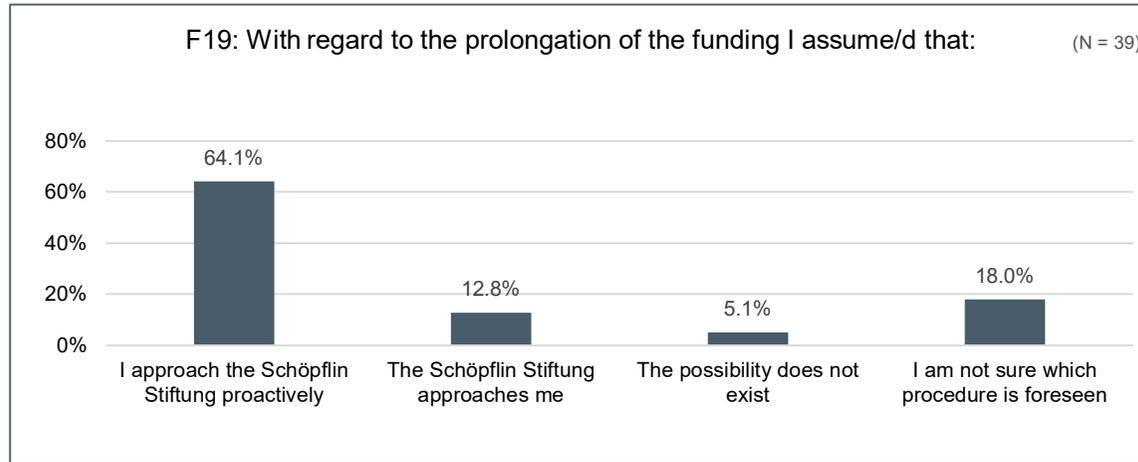
*Quote from a funding partner*

*"Expansion of the network of experts on questions of financing and organizational consulting"*

*Quote from a Critical Friend*

# Prolongation and termination

The funding partners see themselves as an active driving force with regard to the extension of the funding - when the funding ends, many wish for early communication and openness



F20: What would be/was of importance to you in case of a termination of the funding relationship?

*"Early communication on this. If possible and appropriate, a recommendation to other sponsors and remaining in the Foundation's network."*

*"a final meeting!"*

*"That would be the end of us!"*

*"comprehensible justification; constructive feedback on the funding period (in terms of applications, reports, relationship, work...) and suggestions for improvements".*

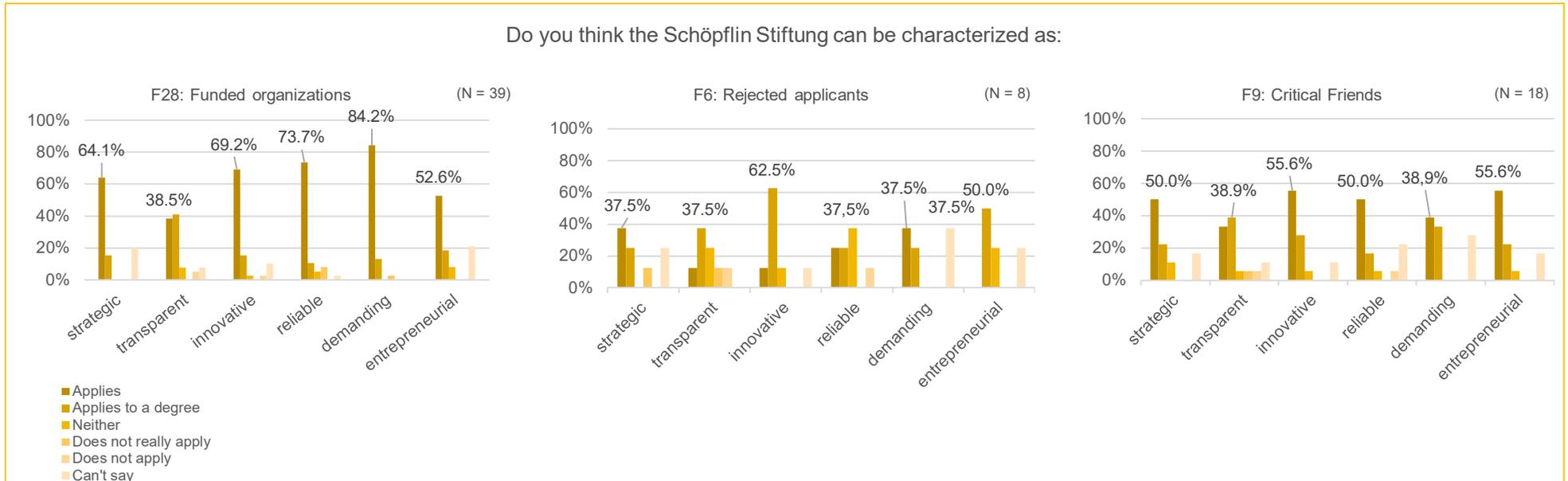
## Evaluation:

- 64% of the current funding partners see themselves as responsible for initiating talks on extension. Only 13% see this as the task of the Schöpflin Foundation. At first glance, therefore, there is much to suggest that the funding partners are very active partners.
- However, almost 20% of the funding partners are not clear about what action is necessary.
- Those questioned would like to see early, open and clear communication, support in finding follow-up financing and a structured final discussion, both when the funding is extended and, above all, when it is terminated.

# STRATEGY, IMPACT & COMMUNICATION

# Strategy & Impact (1/3)

Across all three groups surveyed, the Schöpflin Foundation is perceived as a strategically working foundation; especially by current and former funded organizations



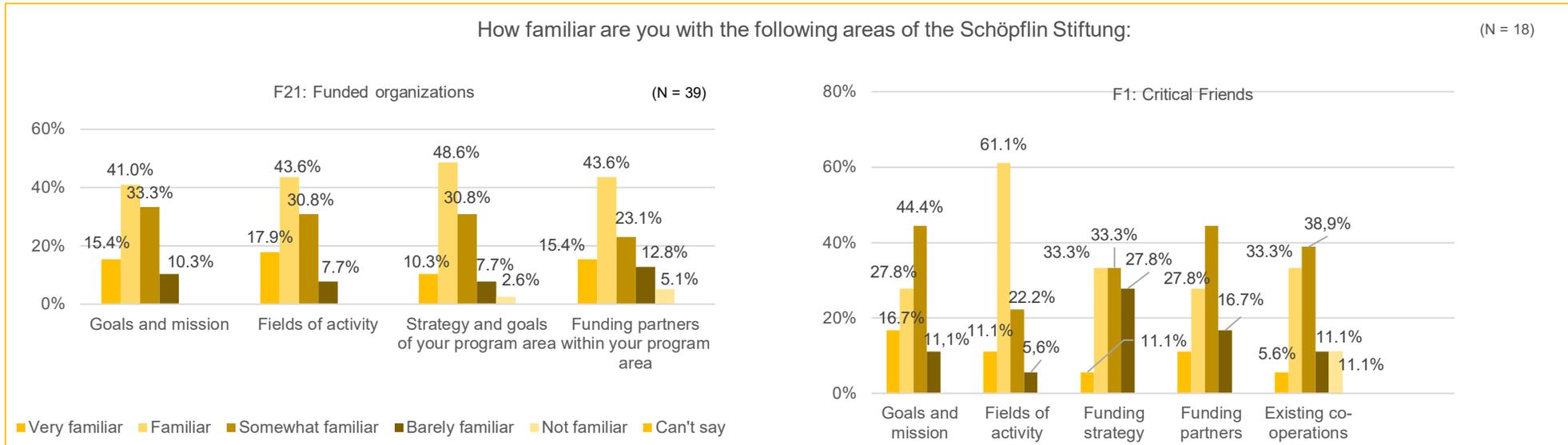
*"The Schöpflin Foundation thinks entrepreneurially and strategically far ahead. I like that best."*  
Quote from a funded organization

## Evaluation:

- The Schöpflin Foundation is considered a strategically working foundation in all three groups surveyed. With 64% agreement, current and former funded organizations rate this dimension as the highest.
- The majority of the organizations supported perceive the Schöpflin Foundation as a demanding foundation (84% "Agree").
- The transparency dimension is evaluated more cautiously ("Applies somewhat"), but remains positive overall with approx. 40% agreement across all three groups.

# Strategy & Impact (2/3)

There is not the same knowledge about the Schöpflin Foundation among the funded organizations and the Critical Friends; Critical Friends mainly lack knowledge about the funding strategy of the Foundation



*"Strong desire for exchange - in terms of content and organization. "Strive to be a 'learning' organization."*

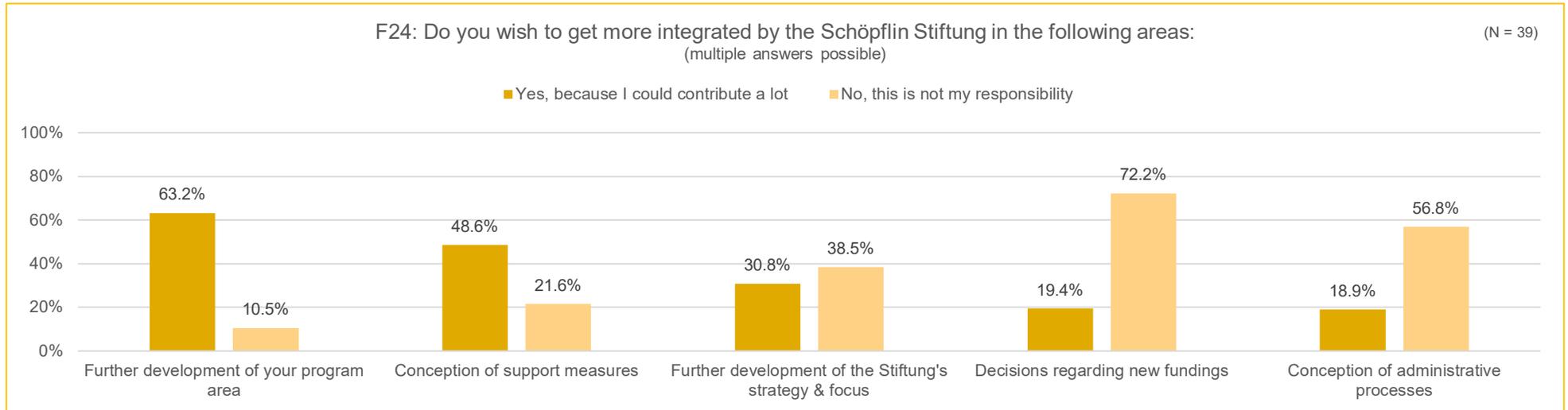
*Quote from a funded organization*

## Evaluation:

- Funded organizations are quite well informed about "objectives and mission", "fields of activity", the "strategy of the relevant program area" and "other funding partners". Critical Friends lack knowledge about the foundation's funding strategy; however, the interviews show that they are familiar with the strategy of the relevant program area.
- In the free-text responses, some of the funded organizations express the wish for more intensive exchange with the foundation and other funding partners about the goals and plans of the respective program area and the integration of the activities into the overall strategy of the foundation.

# Strategy & Impact (3/3)

In the area of strategy, impact and communication, the funded organizations have a clear idea of where they can provide helpful support and where not



*"The points given should take into account the time resources of the funding partner."*

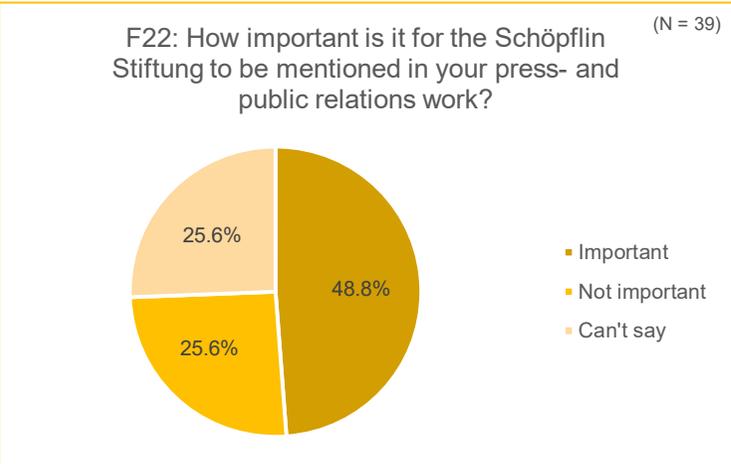
*Quote from a funded organization*

## Evaluation:

- Around 63% of current and former funded organizations express interest in becoming involved in the further development of their specific program area within the Schöpflin Foundation.
- In contrast, the majority do not wish to be involved in decisions on new funding.
- With regard to the further development of the Foundation's strategy and priorities, the picture is ambivalent: While 31% of the current and former funded organizations would like to become involved, 39% of the respondents do not see themselves as being responsible in this area.

# Communication (1/2)

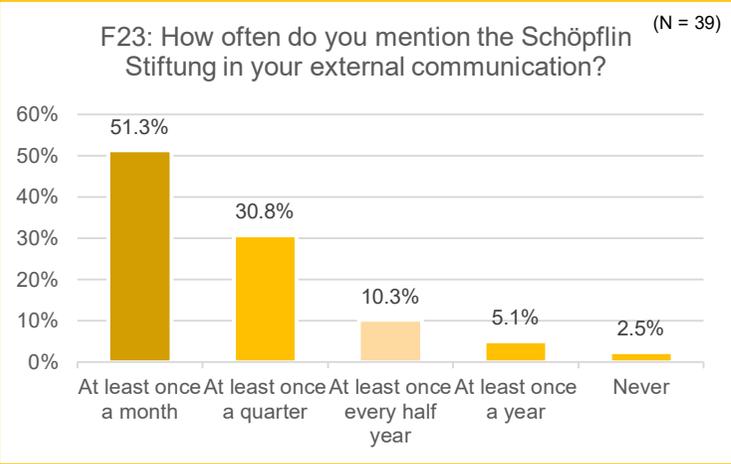
Half of the funded organizations surveyed feel responsible for involving the foundation in their external communication and do this at least once a month



*"The Foundation claims a comparatively more active role."*  
*Quote from a funded organization*

**Evaluation:**

- 49% of current and former funded organizations think that it is important for the Schöpflin Foundation to be mentioned in the organization's public relations work.
- This perception coincides with the impression of the funding partners that the Schöpflin Foundation plays an active and demanding role in the funding relationship.



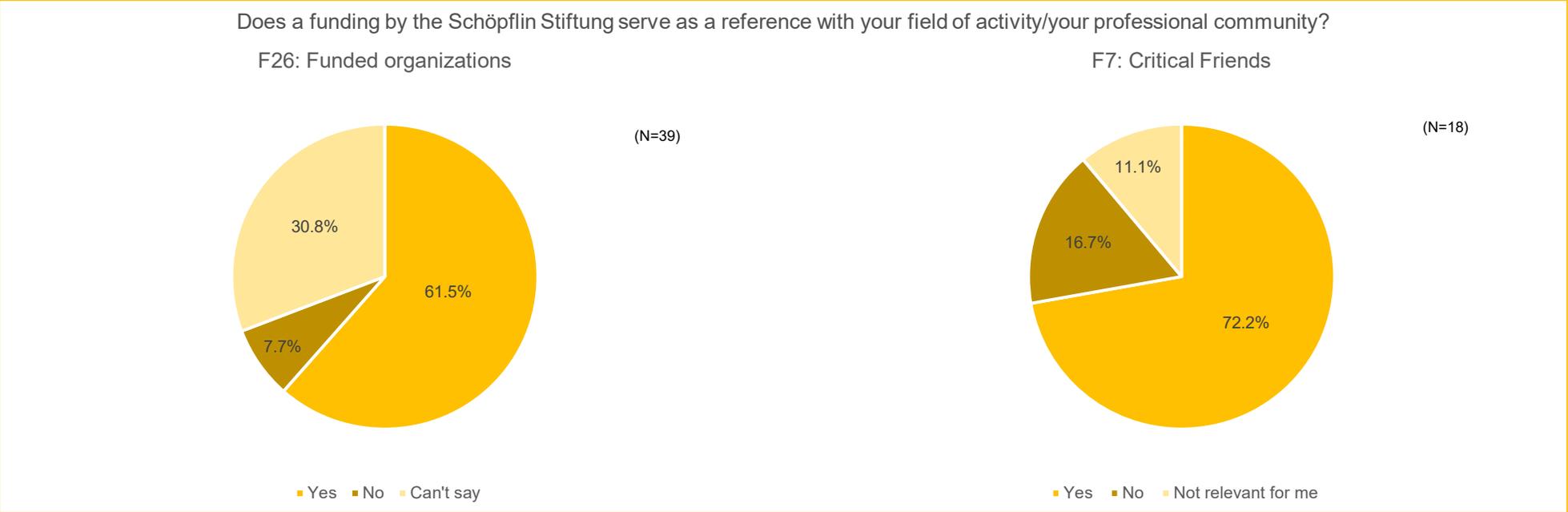
*"Not so good: No presence in social media."*  
*Quote from a funded organization*

**Evaluation:**

- Half of the funding partners surveyed mention the foundation at least once a month in their external communications. Around 31% do so at least once a quarter.

# Communication (2/2)

From the point of view of the majority of the funding partners surveyed and almost 75% of the Critical Friends, funding by the Schöpflin Foundation is a reference



*"More active communication of their own activities and innovative funding approaches - in the foundation sector and beyond"*

*Quote from a Critical Friend*

**Evaluation:**

- 62% of the funding partners surveyed see funding by the Schöpflin Foundation as a reference.
- In the group of Critical Friends the approval is even higher: 72% of those surveyed answered "Yes".
- Compared to the funding partners, the rejection among the Critical Friends is also greater: 17% deny the question of whether funding by the Schöpflin Foundation is considered a reference in their professional community. This could also be explained by the fact that the Schöpflin Foundation is a comparatively young player in the foundation sector.

# Phone interviews with the Critical Friends - additions

The interviews with Critical Friends of the Schöpflin Foundation make it clear that its impact unfolds primarily through long-term support for organizations

## Effect through holistic funding

- **Holistic approach:** From the perspective of the Critical Friends, the Schöpflin Foundation achieves impact through its holistic approach to support. This approach is characterized by long-term support that benefits not only projects, but - in particular - organizations as a whole. This strategic approach can also have a positive effect on the initiatives themselves, which are strongly activity-oriented and less strategic. The Schöpflin Foundation's self-image as a learning foundation also has an impact on the German foundation sector and the actors who operate in the foundation's environment.
- **More clarity in strategic orientation:** Some of the discussion partners are not informed about the overall strategy of the Schöpflin Foundation, but are aware of its funding approach. They express the impression that the Foundation has gone through several strategic processes in recent years. More clarity about the current strategy would be helpful for further cooperation opportunities. The connection between the funding topics could be even clearer. The thematic breadth is also mentioned several times with the comment that it could be more focused/reduced. At the same time, some describe this thematic breadth as a unique selling point of the Foundation.
- **Discreet external communication:** The external communication of the Schöpflin Foundation is hardly noticed by many. On the one hand, this is evaluated positively. On the other hand, some respondents see potential for improvement on the part of the Schöpflin Foundation.

*"The Schöpflin Foundation is a lucky bag in a positive sense."*

*Quote from a Critical Friend*

*"pleasantly modest, not with vanity, but very clear"*

*Quote from a Critical Friend*

*"In order to better support funding partners, the foundation should focus on their marketing, as they are hard to find."*

*Quote from a Critical Friend*

# Agenda

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1

Introduction

*Page 3-8*

- Initial situation & objectives
- Goals of a partner survey
- Procedure
- Key data of this partner survey
- Significance of a partner survey

2

Analysis

*Page 9-41*

- Associations with the Schöpflin Foundation
- Conveyor initiation
- Funding phase
- Strategy, impact & communication

3

Trends

*Page 42-44*

- Trends in the foundation sector from the perspective of the critical friends

# Trends from the Critical Friends' view (1/2)

In the telephone interviews, future trends in the foundation sector were asked; the answers reveal six trends and show that the sector is striving for relevance and impact

1

## Exchange and network are gaining importance

- The foundation sector does not need more competition, but more structured cooperation and cross-sector partnerships.
- The number of Collective Impact projects will increase as competition for funding partly neutralizes positive effects of financial support.
- Trans-sectoral networking and exchange between very different actors (e.g. size, funding strategy, professionalism and financial potential) in the foundation sector will increase; this will lead to the foundation landscape moving closer together.

2

## The funding practice is becoming more sustainable

- The foundation sector will also become more sustainable by taking a more long-term approach to funding practice.
- There will be fewer short funding periods ("projectitis") and the trend will be towards long-term, programmatic, cross-sectoral and process-oriented funding.
- Foundations act as so-called "conveners"/"networkers".
- Problem-solving orientation and stronger target group involvement are replacing opportunity-oriented funding.

3

## Impact investing and venture philanthropy could stagnate

- Impact Investing (II) and Venture Philanthropy (VP) will become part of the usual range of funding instruments, but will not get beyond a low level.
- II will receive more attention than VP and therefore has more potential for further development.
- Foundations that promote social entrepreneurial solutions will network better and try to find like-minded people.
- II will develop into an independent financial pillar, with completely different donors (institutional investors) in the long run.

# Trends from the Critical Friends' view (2/2)

Financial pressure and digitalization will lead to a change in the role of foundations in society, with a focus on impact and transparency

4

## Financial dimension changes the sector

- Others attest that II will become stronger, as foundation capital will focus not only on the income side but also on the investment side (keyword: mission driven investment). There will be a few pioneers who will gain media attention as a result.
- A phase of low interest rates will continue and limit investment opportunities. Foundations will therefore have to invent other funding vehicles. "Impact investing or mission driven investments can be good instruments for this.
- Social enterprises could benefit from these developments.

5

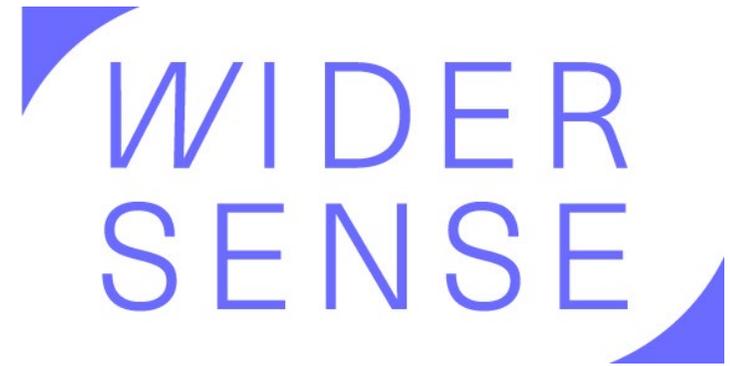
## Digitalization change the foundation operations

- Digitization will make the foundation sector more transparent, efficient and participatory.
- The systematic collection and evaluation of mega data will enable foundations to clearly identify whether they have had an impact on society.
- The use of technical tools will lead to fewer personnel resources being tied up in project management and monitoring, freeing up more capacity for impact-oriented action.

6

## The role of foundations will be reconsidered

- As the impact of foundations becomes increasingly verifiable as a result of digitalization, they will also have to face up more strongly to a public debate about their role and, above all, their legitimacy.
- Greater reflection on the topic of "philanthropy vs. welfare" will begin.
- Foundations will assume an increasingly special or even risky role in contrast to private and public actors.



# Thank you very much!

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