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## Annual Report 2017

Summary

2017 HAS BEEN ANOTHER  
EVENTFUL YEAR FOR US.

IN THIS REPORT,  
WE WOULD LIKE TO SHARE  
WHAT HAS MOVED US  
OVER THE LAST 12 MONTHS  
AND WHAT LIES AHEAD.

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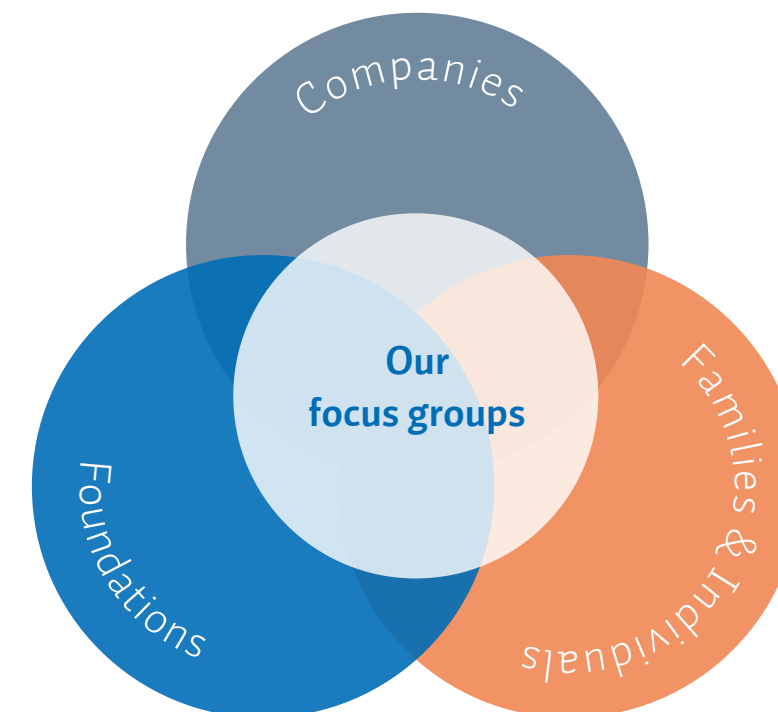
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About this Report

## WHO WE ARE

Beyond Philanthropy is an advisory firm for companies, foundations, and families & individuals, specialising in corporate social responsibility (CSR), philanthropy and social investment. We provide innovative, strategic guidance to help our clients design, develop, and implement the most effective social change projects.



### Our Partners



Beyond Philanthropy works with a global network of partners. An important pillar of this network is the strategic partnership we formed with the advisory firm goetzpartners. Via this partnership our clients benefit from our deep sector expertise and knowledge in the fields of CSR, philanthropy and social investment as well as goetzpartners' business consulting know-how in the fields of strategy, mergers and acquisitions, and transformation. [www.goetzpartners.com](http://www.goetzpartners.com)



In 2017 we intensified our collaboration with Achieve Agency in Indianapolis. Achieve Agency is an expert on cause related giving and corporate philanthropy. Its research on the millennial generation has been crucial in defining new engagement practices [www.achieveagency.com](http://www.achieveagency.com)



In 2017 we also collaborated with our long-time partners at Social Investor Partners in Zuerich. [www.socialinvestors.com](http://www.socialinvestors.com)

# OUR YEAR

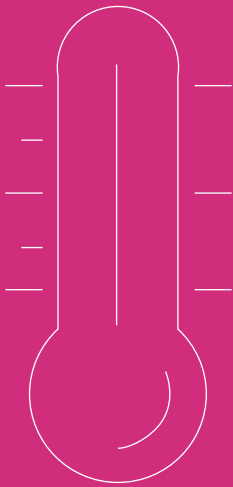


Some of our topics:

- Corporate Citizenship
- Corporate Social Innovation
- Corporate Volunteering
- Eating Disorders
- Impact Investing
- Mental Health
- Mindfulness
- STE(A)M Education
- Unconditional Basic Income
- Species Protection



46 projects completed  
3 projects with goetzpartners



Approx. € 640 k revenue   30 clients   2 studies, in addition to articles in a variety of magazines and books (and additionally on our own social media channels)

Almost 500 followers on Twitter since April



1 managing director on sabbatical for 6 months  
1 part time colleague for communications hired

1 baby born



## WHAT WE LEARNED IN 2017 AS AN ORGANISATION

1

Pave the way ahead: due to alternating project teams, we gave up our permanent desks and moved towards a flex-desk approach. What we learned: While communication and team work actually improved, spare yourself some headaches by ensuring that your IT infrastructure is as mobile as your team.

2

Do not underestimate the importance of strategic distribution of your content. While we tend to be strong in deeply immersing ourselves in our research topics, we have ample room to improve in making interesting findings more easily available to the public, especially the media. That begs the question: Is content or distribution king?

3

It takes opportunities to grow: Given that one of Beyond Philanthropy's managing directors was on a six-month foundation research fellowship, the Beyond Philanthropy team had the opportunity to take on different roles and responsibilities. As a result, the team grew and moved out of their respective comfort zones.



### WHAT WE LEARNED ABOUT PHILANTHROPY

By connecting our clients to other funders or experts with similar interests, Beyond helps to foster exchange and mutual learning. With this aim in mind, we connected our client—and individual donor—to another donor within our network. After several discussions on how to approach grant selection and monitoring, the donors' initial intention

to formally collaborate shifted to a project-based co-operation. This change enabled each party to stay true to their standards, methods, and beliefs. This experience confirmed for Beyond Philanthropy that successful collaborations depend as much on a common approach to grantmaking as they do on shared dedication to a cause.

### WHAT WE LEARNED ABOUT OF CORPORATE CITIZENSHIP

Our study From Good Intentions to Real Results is intended to provide a systematic overview of the state of corporate citizenship among DAX 30 companies--Germany's 30 largest publicly listed corporations-- and to further the qualitative discussion of what constitutes good corporate citizenship. We have learned that there is a lot of potential in this area and some companies are already

putting it into practice. However, the road to a sector-wide agreement is a long one. Yet we are happy to see that the subject is starting to attract more interest and we look forward to continuing the journey with fellow change-makers who also seek to advance the discussion and practice of good corporate citizenship.

## OUR CLIENTS

We work with companies, foundations, and private individuals who want to improve their social impact. Over the last few years, we have worked with clients from over 30 countries. In 2017 alone, we covered roughly 20 topics. We look forward to continuing our relationship with our existing clients and to work with new partners towards social change.

“ goetzpartners and Beyond Philanthropy worked with us to revisit the Siemens Corporate Citizenship positioning. Beyond Philanthropy’s in-depth sector expertise and goetzpartners’ inclusive strategy development approach proved to be the ideal combination to help us gain valuable market insights and develop a modern Corporate Citizenship positioning in collaboration with our partners in the regions.

Rosa Riera  
VP, Employer Branding and Social Innovation  
at Siemens AG

“ We collaborated with Beyond Philanthropy and goetzpartners to review and round out Generali’s new CSR strateg’ ‘The Human Safety Net’ (THSN). Based on their complementary areas of expertise in corporate social responsibility and management consulting, we were fortunate to get the best of both worlds in the form of one joint team.

Patrick Hoffmann  
Programme Manager, The Human Safety Net  
Group Communications & Public Affairs  
Assicurazioni Generali S.p.A.

Some of our clients

| BertelsmannStiftung

**BMW Foundation**  
Herbert Quandt



**Prof.  
Otto Beisheim  
Stiftung**



Ingvild Goetz Philanthropy



**SIEMENS** | Stiftung

Individual

Entrepreneurial Family

## OUR PROJECTS

Beyond Philanthropy's research branch is always looking for innovative trends which might affect our clients' social engagement. One of these trends is the current development from STEM (German: MINT) to STEAM. Instead of strictly focusing on sciences, technology, engineering, and math, STEAM includes the arts and represents a holistic educational concept. This wider definition invites innovative and creative teaching methods such as design thinking and problem-based learning and thus has the potential to change the way our schools work in a digital future. STEAM aims to unlock the creative capability of children and youth who might become more innovative and independent-minded.

In addition, the interdisciplinary character of STEAM education helps to make traditional STEM topics more attractive by relating them to students' everyday lives. Given the potential of STEAM, a German foundation asked our team to research whether the transformation from STEM to STEAM is happening in Germany. The result: Even though the German educational system is still emphasizing STEM education, some innovative schools and extra-curricular initiatives have interdisciplinary arts-based approaches to integrate arts to STEM education. However, to implement STEAM on a broader level, more collaboration between sectors and disciplines as well as public awareness are necessary.

Beyond Philanthropy was hired by a German foundation with a clear geographical focus to advise them on a strategy review process. The foundation would like to increase its impact and effectiveness by raising its profile and reputation in its various fields of grantmaking. Our process was twofold: First, we looked at the needs and niches in the giving areas and weighed those against the founder's motivation. We then facilitated a process in which the foundation defined its priorities based on current needs and the will of the deceased founder.

Second, we suggested ways to streamline operations based on the defined impact goals. A very important aspect was also to encourage the foundation to further develop its own profile by becoming more proactive, i.e. initiating projects and finding the right partners itself, instead of waiting for them to find the foundation. The foundation decided to start the implementation of its new approach and priorities in the field of education. We look forward to being part of this process in 2018.

## PUBLICATIONS

In addition to working with our clients, publishing our own research was a priority in 2017. Not only did the management and team publish articles in a variety of magazine and books (and additionally on our own social media channels), we also produced our first two extensive studies:

In May we published a benchmark of Corporate Citizenship of Germany's DAX 30 Companies. In October Value<sup>2</sup> was produced, which analyses the potential of the so called Base of the Pyramid (BOP) concept in Germany

### From Good Intentions to Real Results - Corporate Citizenship of Germany's DAX 30 Companies

It is obviously up to DAX 30 companies themselves where and how they engage in corporate citizenship activities. However, it is surprising that, despite spending an excess of EUR 500 million corporate citizenship activities, only 17 percent of DAX 30 companies report results based on resilient KPIs.

We aspire to contribute to constructive dialogue about quality Corporate Citizenship, give pointers on how to get there, and we hope that this study can spark a much overdue debate.

<https://www.beyondphilanthropy.eu/corporate-citizenship-benchmark>

Review in Welt dated 30.04.2017 (in German): <https://www.welt.de/wirtschaft/article164136063/Diese-Dax-Konzerne-spenden-ohne-Sinn-und-Verstand.html> - [Date of Access: 04.12.2017]

Review in Frankfurter Rundschau dated 19.05.2017 (In German): <http://www.fr.de/wirtschaft/gesellschaft-planloses-engagement-der-dax-konzerne-a-1282102> - [Date of Access : 04.12.2017]





## Value<sup>2</sup>

### Social Innovation for Companies and Society

Beyond Philanthropy and Social Impact, supported by the BMW Foundation Herbert Quandt, released a study that hopes to inspire companies to adopt the Base of the Pyramid (BOP) concept in Germany. Developed in 2002 by C. K. Prahalad, the BOP concept is a business model for companies that specifically targets the low-income population. People from the Base of the Pyramid can, for example, serve as customers, suppliers, or intermediaries and, by doing so, strengthen their material and social standing. The concept was originally implemented in developing countries.

However, in Germany there are also more than 16 million people threatened by poverty and social exclusion. Examples in France prove that the BOP concept can be successfully implemented in European countries. Companies such as Danone, Renault and Schneider Electric have teamed up and started the “Action Tank Entreprise & Pauvreté” in order to support the low-income population with participatory, social and innovative solutions. This and other popular examples from abroad show that the BOP concept creates value both for the low-income population and participating companies.



Executive Summary in English  
[https://www.beyondphilanthropy.eu/en/20171121\\_Beyond\\_Philanthropy\\_Value2\\_Executive%20Summary%20ENG.pdf](https://www.beyondphilanthropy.eu/en/20171121_Beyond_Philanthropy_Value2_Executive%20Summary%20ENG.pdf)

Value2-study  
[https://www.beyondphilanthropy.eu/ideas/topics/mehrwert\\_eng](https://www.beyondphilanthropy.eu/ideas/topics/mehrwert_eng)



Co Cit Event  
 Presentation „From Good Intentions to Real Results - Corporate Citizenship of Germany's DAX 30 Companies“ in Berlin  
<https://www.beyondphilanthropy.eu/ideas/events>



Presentation „Value<sup>2</sup>“ in Munich  
[https://www.beyondphilanthropy.eu/ideas/topics/mehrwert\\_eng](https://www.beyondphilanthropy.eu/ideas/topics/mehrwert_eng)



# INTERVIEWS

In May you published a study on Corporate Citizenship of Dax 30 companies. What were the most surprising findings?

Only 1/3 of DAX companies engage in activities fully linked to their core business.

Less than 2/3 of DAX companies report in detail on their corporate giving.

The reporting companies give approx. EUR 500m/year in cash, in-kind, and time



**Fabian Suwanprateep** is Manager at Beyond Philanthropy and advises a wide range of clients in their CSR, philanthropic, and social investing activities.

What were your personal highlights of 2017?

My highlight was without a doubt the launch of our study on Corporate Citizenship of Germany’s DAX 30—our first extensive publication ever—and organising a panel discussion addressing the study’s results. Although tropical rains fell on the night of the panel discussion and public transport stopped working in Berlin, more than 60 guests managed to show up and engaged in a lively discussion with our panellists.



**Anne-Sophie Oehrlein** is Associate at Beyond Philanthropy, she joined us in early 2016. Anne-Sophie conducts research on various topics connected to Beyond Philanthropy’s mission.

Beyond hosts regular “brown bag lunches” where invited guests present on topics relevant to our work. What were some things that you learn?

We had a record number of 14 lunches in 2017 and I learned so much: We got to know new organisations like Karma&Cents from Canada, deepened my knowledge on topics such as project transfer through Stiftung Bürgermut’s expertise, hear first hand experience with new work models from Betterplace Lab. Another highlight was an introduction to Bürgerstiftung Neukölln, where I am now a volunteer. I am incredibly thankful to all our guests.



**Lea Buck** is Senior Consultant at Beyond Philanthropy. She focusses on working with private individuals and foundations.

# INTERVIEWS

## What are Beyond Philanthropy's plans for 2018?

Beyond Philanthropy in 2018 will prove Greek philosopher Heraclitus right again that "there is nothing permanent but change". Philanthropy, impact investing and corporate social responsibility (CSR) are in a dynamic state right now. The reasons for this are manifold. We want to focus on the following drivers of change in 2018:

**Digitization:** Everybody talks about the growing importance of data analysis or artificial intelligence for the sector. But what do these trends and the developments behind them mean for the day to day work of a donor, a foundation or a company? We would like to explore this in 2018 with the help of research and also with public events. We are right now conducting a study on the reality of digitization for CSR managers in companies in Germany and the US. These developments, for instance, allow the complete individualization of employee giving programs and raise questions about data responsibility. We are also planning a workshop on a digital needs assessment during the German Foundation Day in May in Nurnberg together with grantbooks, a B-Corp partner of ours from Toronto. One important question in this field is how foundations can better manage data and use it towards their strategic goals.

**Equity:** The way wealth is distributed in our democratic societies and equity overall is crucial for the way we will live together. It is also important for how private or corporate philanthropy is perceived by the wider public. Based on our study Value² we want to explore further how companies and non-profit organizations can work together to overcome social gaps based on entrepreneurial, cross sector projects. For instance, we will explore how companies and private donors in Europe can together play a more active role in combating youth homelessness. The growing numbers in this area are of great concern to us.

**Impact Measurement:** We have always done it but have never really communicated what we mean by it and how we do this in our day to day work. We will document our work in this field in the next couple of months. Stay tuned for a couple of ideas from our side.

**Corporate Volunteering:** Together with Prof. Dr. Laura Marie Schons-Edinger. Chair for Corporate Social Responsibility at the University of Mannheim, we are currently conducting a study on corporate volunteering realities. We are confident that this study together with other current publications will enrich the strategic options companies have in this field.

**These are four challenges that we will take on in 2018.** For sure we will also continue our quests to define what good CSR really is or to explore the best way how to facilitate donor – grantee relations. We are also thrilled that Felicitas has been invited to join the Supervisory Board of B Lab Europe which underlines our commitment to growing the B-Corp movement. It looks like 2018 really is going to be another year of learning, curiosity and change.

## What do you think are the most important trends in the non-profit sector?

**Impact Investing:** This is still a trend because it is not really implemented by many families, foundations. Nonetheless, impact investment is on the rise. Impact Investing is here to stay and there is still a lot to learn.

**Data as a lever:** Digitalization is also entering the philanthropy space. Data management and data sharing to better understand impact but also as a way to create impact will become crucial for the sector.

**Place-Making:** It is still hard to understand but we see again more donors investing in places for convening, community places. This will be something to look out for.

**Transparency of Giving Vehicles:** With all the Paradise Papers, and other reports in the media, there is also a new interest in transparency of foundations, charitable trusts, donor advised funds, and the like.



**Felicitas von Peter** is both the Founder and Managing Director at Beyond Philanthropy and Active Philanthropy, linking both the for-profit and non-profit worlds. At Beyond Philanthropy, she works with several of our individual and family clients.



**Michael Alberg-Seberich** is Managing Director at Beyond Philanthropy. He heads the advisory work of Beyond Philanthropy and handles all questions relating to philanthropy, CSR and impact investing.

# BCORP & BEYOND

Beyond Philanthropy is among the first B Corps in Germany and was recertified in 2017. We meet rigorous standards of social and environmental performance: accountability, transparency, and sustainability are at the heart of our day-to-day work. We also work in close cooperation with our charitable parent organisation, Active Philanthropy.

People

- One volunteering day per month for every employee
- Gender balance
- Free coffee and organic fruit for employees
- Regular trainings

Planet

- Recycling
- Sustainable and certified stationary
- Reduced carbon footprint
- All travel compensated through atmosfair

Profit

- All our profits are made in pursuit of social change
- Profits are transferred to Active Philanthropy

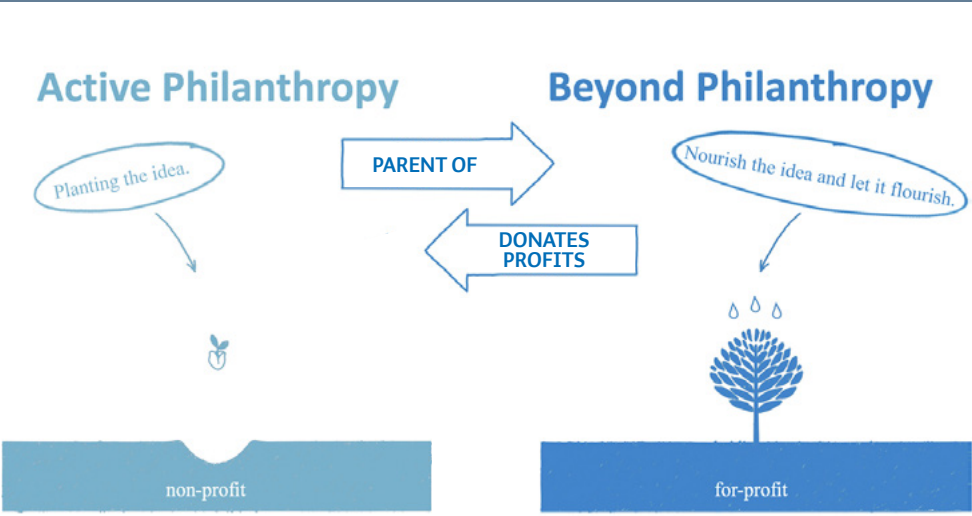


As a B Corp member, we participated in the B Together event in Berlin. Nathan Gilbert, Co-Executive Director of B Lab Europe, shared the vision and the future plans of the B Corp movement globally and locally. In an interactive session we brainstormed ideas and opportunities that could enrich and drive the movement especially in Germany.

We also worked on the organizational development of Beyond Philanthropy and invested in continuing education for our team. In addition, The Beyond team volunteer one day a month in organizations dedicated to a range of social issues such as children and adolescents in need, youth unemployment, and inclusion and accessibility.

In September we spent a weekend in Copenhagen to attend the INDEX: Design to Improve Life® Award 2017 ceremony. We learned about sustainable design solutions to global challenges in the categories body, home, work, play & learning, and community.

Active Philanthropy informs and inspires individuals and business families throughout Europe to invest their resources strategically and sustainably. Active Philanthropy aims to activate its network to discover and understand complex societal challenges and to fully leverage their potential as philanthropists or social investors.





## Team



**Michael Alberg-Seberich**  
Managing Director



**Dr. Felicitas von Peter**  
Managing Director



**Theresa Bartsch**  
Executive Assistant (on maternity leave)



**Lisa Born**  
Executive Assistant



**Lea Buck**  
Senior Consultant



**Maximilian Grimm**  
Consultant



**Kerstin Ischen**  
Communications Manager



**Anne-Sophie Oehrlein**  
Associate



**Julia Röhrich**  
Senior Consultant



**Mareike Standow**  
Analyst (until December 2017)



**Lisa Steinke**  
Analyst



**Gabriele Störmann**  
Senior Consultant



**Fabian Suwanprateep**  
Manager



**Anna Wolf**  
Senior Consultant

## About this Report

If you want to learn more about Beyond Philanthropy,  
visit our website: <https://www.beyondphilanthropy.eu>

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