

# COMMITTED DONORS

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SUPPORTED PROJECTS Sample donations P. 30



FONDATION PHILANTHROPIA

LOMBARD ODIER



"WE DO NOT INHERIT THE EARTH FROM OUR PARENTS, WE BORROW IT FROM OUR CHILDREN."

ANTOINE DE SAINT-EXUPÉRY

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# PRESIDENT'S MESSAGE

An umbrella foundation associated with the Lombard Odier Bank and a registered charity, Fondation Philanthropia has been helping its donors carry out their philanthropic initiatives since 2008. We provide support to individuals who wish to develop a philanthropic project that matches their background, desires and ambitions. The Foundation offers its donors a legal, financial and philanthropic framework for made-to-measure projects.

The year 2018 was marked by the celebration of the Foundation's 10th anniversary, providing us the perfect opportunity to thank our donors through various events. In particular, we organised an evening dedicated to climate change at the Geneva International Film Festival and Forum on Human Rights (FIFDH) and a field visit to the La Tuile association in Fribourg. We also held a conference in Geneva, which brought together donors and philanthropists to discuss causes such as cancer research, ocean conservation and the sharing of expertise. These opportunities for discussion, learning and networking are some of the many benefits Philanthropia offers its donors.

The Foundation is first and foremost a learning and experimentation platform for donors who are passionate about launching a philanthropic project. It serves as an incubator for these initiatives, but is also a platform for historically independent foundations in search of a second lease on life. These foundations place themselves under the aegis of Fondation Philanthropia in order to gain fresh impetus and unburden themselves of any administrative tasks.

In the age of connectivity and in a world where the silo mentality is all too prevalent, our Foundation offers those who wish to make a difference access to a philanthropic community based on the sharing of experience and knowledge. The umbrella foundation model makes it possible, now more than ever, to respond to humanitarian, social and environmental challenges. Our donors become ambassadors and specialists in the fields they have chosen to support and I would like to take this opportunity to thank them for their trust and loyalty. In the words of Seneca: "You must live for another if you wish to live for yourself."

"The umbrella foundation provides access to a community where you can share and grow through philanthropy."



DENIS PITTET PRESIDENT OF THE FOUNDATION



# **WATER IS THE DRIVING FORCE OF ALL NATURE.**"

LEONARDO DA VINCI



# 2018 - OUR ANNIVERSARY YEAR



# **OUR ACTIVITY IN 2018**

In 2018, the Foundation organised various events for its donors to mark its 10<sup>th</sup> anniversary.

A field visit was organised to Le Tunnel, a sociocultural café in Fribourg. Managed by the social integration association La Tuile, this social enterprise is one of Philanthropia's beneficiaries. Guests were able to meet project managers and discuss the opportunities presented to philanthropists by the needs of social enterprises in Switzerland and abroad.





The 10<sup>th</sup> anniversary event, which was held in September 2018 in Geneva, brought together 120 people. Guests were also presented with examples of philanthropic involvement in key areas in the field of cancer research and ocean conservation. Philanthropia donors shared their stories and compared them with their experience with other philanthropic bodies, such as the Oak Foundation and Zennström Philanthropies.



Pre-paid cups of coffee made available to low-income customers, Le Tunnel, Fribourg



# **GRANTS IN 2018**



"Philanthropia has enormous potential. Donors create their own funds in a very flexible way, or team up with other donors to support projects that would not be possible without sharing costs. It is an ideal point of entry, both for established philanthropists looking for a secure and reliable foundation over the long term, and for the new generation seeking innovative ways to become involved. such as social entrepreneurship."

> Denis Pittet, Sphère magazine, January 2019



ASL (Association for the Safeguard of Lake Leman) poster campaign

# BREAKDOWN OF GRANTS BY TYPE OF ACTION 2009-2018



# BREAKDOWN OF GRANTS BY THEMATIC AREA 2009-2018



#### ANNUAL GRANTS 2009-2018





Updated in 2018, this free guide is aimed at individuals looking to get involved in the fight against cancer by directing their donations in a thoughtful and useful way. It answers all the questions donors may have and informs them of innovative opportunities that are not just limited to research. By analysing progress in the prevention and treatment of cancer, it provides new perspectives for donors, which are closely aligned with the reality on the ground and current needs. This guide is available at: https://tinyurl.com/y6kjxy4n

# "THE LOVE FOR ALL LIVING CREATURES IS THE MOST NOBLE ATTRIBUTE OF MAN."

**CHARLES DARWIN** 



# INTERVIEW WITH ADELIN COIGNY, FOUNDER OF THE SMILE WAVE FUND



Adelin Coigny, Founder of the Smile Wave Fund

Founded in 2016, the Smile Wave Fund aims to support public interest projects in the areas of education, social integration and environmental protection, with a particular focus on ocean conservation. It is active in both Switzerland and abroad. We spoke with the fund's founder, Adelin Coigny, to understand what motivates him.

#### WHY DID YOU CHOOSE TO CREATE AN UMBRELLA FUND?

The umbrella fund model allowed me to develop my project within a versatile structure. Fondation Philanthropia has helped me to nurture this project and gain experience in the area of institutional philanthropy. The umbrella fund structure is much easier to set up and less expensive than a regular foundation, which means I can allocate more resources to the causes I wish to support.



### HOW DO YOU MANAGE THIS FUND?

Following the initial process of selecting the best partners (environmental and youth integration NGOs), I had a clearer idea of the causes I wanted to support. I was then able to plan the fund's annual distributions based on the analyses provided by these NGOs and by following a few rules I set for myself. For example, I try to cover roughly 10% of an organisation's budget, once it has been recognised as being competent, in order to have a genuine impact on its projects. I give free rein to its managers in terms of creativity and am willing to support structural costs to give them more power to act or to become more effective. It's important to maintain a strict budgetary approach, but also to keep something aside for those special projects that arise.



Aeolian Islands

#### HOW MUCH AUTONOMY DO YOU HAVE?

I always meet in person with the organisations I may end up supporting and consult with Philanthropia's advisors to compare my analysis with theirs; this helps to counterbalance my spontaneity with a more thoughtbased approach. I also visit the field a lot. I created a website to highlight the organisations we support. My ambition is to connect the organisations supported by the fund and one day have them work together to combine their efforts. This has already been achieved among some of them, which are working together to establish a marine protected area in the Aeolian Islands, in northern Sicily.



www.smile-wave.org

# THE ADVANTAGES OF OUR UMBRELLA FOUNDATION

#### THE IMPACT OF EACH GRANT IS MULTIPLIED

Fondation Philanthropia's structure allows private donors to pool their funds with other donors to support projects that would have been inconceivable without being able to share the costs. The impact of each donation is thus multiplied.

Within these structures, each donor can create a personal fund that operates in almost exactly the same way as an independent foundation, while benefiting from the economies of scale offered by the umbrella structure.

Philanthropia provides all the administrative, accounting and legal services required, so donors are free to focus exclusively on their philanthropic causes in full confidence.

# THE ADVANTAGES

Compliance

In an increasingly complex legal environment, it is vital to ensure that the right procedures are followed and changes made.

#### Choice

The profile of the fund is adapted to the organisation's needs (long-term funds or funds with disposable capital, regular donations or bequests, etc.).

#### • Flexibility

To accommodate an existing project or support a new one.

#### Network

Access to a network of donors and the sector's trading platforms.

Philanthropia can help you achieve your philanthropic ambitions with the added assurance of simplicity, security and tailored solutions that are precisely aligned with your objectives.

## YOU CAN CHOOSE BETWEEN TWO OPTIONS

#### THEMATIC FUNDS

These funds are perfect if you want a swift and straightforward solution. They allow you to operate alongside other donors to support projects and organisations in one of the following five areas:

#### HUMANITARIAN AND SOCIAL ACTION



MEDICAL AND SCIENTIFIC RESEARCH



#### EDUCATION AND TRAINING



#### ART AND CULTURE



#### ENVIRONMENT AND SUSTAINABLE DEVELOPMENT



Fondation Philanthropia is committed to selecting with you the most relevant projects to maximise the impact of your donation.

For each project, we monitor every grant made and report to you on the results achieved.

#### SHELTERED FUNDS

These funds are the right solution if you have already identified the cause or project you wish to support. This option allows you to create your own fund, which then operates as a quasi-independent entity within our umbrella structure. If you wish, you can involve your family and friends by forming a consultative committee to submit grant recommendations to the Board of Fondation Philanthropia. You can also work directly with our philanthropy advisers, who will help you define a grant strategy and select those projects that best suit you.

This option is also suited to existing foundations wishing to reduce their administrative overheads, while retaining a board that plays an active role in the grant-making process.

Twenty-four donors have already created their own personal fund within Fondation Philanthropia. Each of these funds is active in different areas, according to the sensitivities and preferences of each founding donor.



# BESPOKE ASSET MANAGEMENT

Management of the Foundation's capital providing all the necessary security guarantees for the fulfilment of our donors' commitments.

# **COST STRUCTURE**

Philanthropia offers a competitive and advantageous cost structure. All administration, accounting, legal and philanthropy advisory expenses are set at 0.75% of the fund's average assets for the year (0.5% for funds over CHF 10 million), excluding asset management, and subject to a minimum threshold of CHF 3,500. Fondation Philanthropia makes substantial grants every year. Given the Foundation's distribution policy, the low level of returns currently available and the volatility of financial markets in recent years, the Board of Trustees has decided to adopt a management policy based on a financial planning model aimed at providing long-term protection of assets. This policy divides assets into three distinct sub-funds on the basis of a forecast distribution time horizon. Each sub-fund has a specific investment strategy designed to achieve set targets for return on investment and risk management.

#### **RESPONSIBLE INVESTMENT CHARTER**

In order to align the investment strategy more closely with the Foundation's objectives and missions, the Board adopted a responsible investment charter aimed at generating financial returns while having a positive impact on society.

The charter is based in particular on the Principles for Responsible Investment (PRI) initiative launched by investors in partnership with the UNEP Finance Initiative and the UN Global Compact. The management approach is based on negative selection criteria (exclusion of certain unethical sectors of activity), positive selection criteria (Environment, Social and Governance [ESG] ratings and controversy scores), and investments with a social and environmental impact.

#### THE BOARD OF TRUSTEES

Our Board of Trustees guarantees that Fondation Philanthropia is correctly managed at all times. It takes particular care to ensure that its missions are fulfilled in compliance with all the provisions agreed with each of our donors.

Its members have complementary profiles and are all personally committed to the philanthropy sector. The Board meets each quarter to discuss current issues, analyse projects and approve decisions taken by the Foundation, ensuring that they are consistent with the intentions and wishes of our donors.



DENIS PITTET PRESIDENT



ANNE-MARIE DE WECK VICE PRESIDENT



JEAN-MARIE HAINAUT SECRETARY



PATRICK ODIER MEMBER



DR MAXIMILIAN MARTIN MEMBER

"EARTH PROVIDES ENOUGH TO SATISFY EVERY MAN'S NEEDS, BUT NOT EVERY MAN'S GREED."

MAHATMA GANDHI



# PHILANTHROPISTS AND THE DEVELOPMENT OF ORGANISATIONS

As a first resort, donors often opt to finance humanitarian programmes. But even the best programmes can only be properly implemented and effective if they are put in place by a serious organisation.

Philanthropia gives donors the chance to provide a form of support that is seldom practised or simply ignored.

By choosing to invest in an organisation's development, and not just in its activities,

donors can help them become independent and enhance their growth in the long term.

Donors must also consider what investment is needed for the long-term development of organisations.

For example, when such organisations can rely on skilled fundraisers, experienced project managers and advanced IT tools, they are capable of implementing more effective programmes.



In 2018, thanks to Philanthropia's financial support, the following actions were carried out in the field of organisational development:



**SOS Amitié** – a French telephone, messaging and chat service designed to provide support to individuals who are going through a difficult period in their lives – was able to redesign its website in order to recruit volunteer listeners and increase the collection of online donations from the public.

ASL (Association for the Safeguard of Lake Geneva) was able to strengthen its teams as part of the public awareness campaign to promote clean beaches, in particular the future Eaux-Vives beach in Geneva.





**Serata, Stiftung für des Alter**, was able to carry out general maintenance on various residences for seniors in Thalwil, Switzerland.

PHILANTHROPIA COMMITTED DONORS

# ENVIRONMENTAL CHALLENGES

THE MAIN AREAS FOCUSED ON BY DONORS ARE AS FOLLOWS:

# **OCEANS**

Marine protected areas (MPAs) Sustainable fishing and aquaculture Responsible Blue Economy Plastic

# FORESTS

Conservation and restoration Transformation of the forestry industry to prevent deforestation and illegal logging

# **CLIMATE AND ENERGY**

Fight against climate change Energy transition Development of low-carbon financial products

# WILDLIFE

Protection of natural areas Reducing conflict between humans and wildlife Reducing wildlife-related crime

# FOOD

Responsible procurement of agricultural raw materials Sustainable food choices Fight against food waste

# FRESHWATER

Sustainable management of water resources Access to water Watershed stewardship

Source: adapted from wwf.panda.org

# ENVIRONMENTAL CHALLENGES WHY TAKE ACTION?







40% rise in the carbon footprint of tourism from 2009 to 2013



We are currently on the brink of the sixth mass extinction in the history of the Earth. Humankind and our growth pattern are primarily to blame.

In terms of biodiversity alone, the decline in wildlife populations is steadily increasing, averaging 58% since 1970 and expected to reach 67% by the end of the decade, according to the Living Planet Report 2016 (Zoological Society of London; Global Footprint Network; WWF).

For the past ten years, Philanthropia's donors have been committed to protecting the environment. One of the main aims of the Carlo Fund is to combat the trafficking of protected species and reduce the demand for related products. It supported the campaign organised by WWF and Traffic to reduce the demand in Vietnam and China for ivory and rhino horns, which are still used in traditional medicine.

This campaign has enabled major online retailers to support this cause, with Alibaba and Tencent removing this type of product from their platforms.



For its part, the Smile Wave Fund focuses in particular on supporting environmental organisations that protect the oceans (see pages 14-15).

Other donors lend their support to causes such as the fight against desertification in the Sahel, the strengthening of the capacity of African national parks and the promotion of recycling and waste recovery.

Philanthropia has considerable experience in supporting donors who want to contribute in a relevant manner and have the greatest possible impact in addressing the challenge of the century.

Thanks to our advice and network, donors can save time and gain leverage by selecting projects with high impact potential.



# **68**%

of foreign capital invested in the soy and beef sectors, which is driving deforestation in the Amazon, is channelled through tax havens.



70% proportion of cancer treatment drugs that are inspired by nature

Source: Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES), 2019 report. www.ipbes.net



# PROJECTS SUPPORTED





# THAILAND

Organisation focused on educating underprivileged children, primarily in the Greater Mekong region (Thailand, Laos, Cambodia). Support for the rehabilitation of a primary school in Laos.



# SWITZERLAND/CAMBODIA

Support with the transfer of the special education programme created by Krousar Thmey [visually and hearing impaired students] to the Cambodian Ministry of Education.





### GERMANY/INTERNATIONAL YUNUS SOCIAL BUSINESS FUNDS gGmbH

Supported by the **Smile Wave Fund**, the Yunus Fund helps emerging social enterprises in developing countries and provides training and mentoring for entrepreneurs.

### BANGLADESH SHIDHULAI SWANIRVAR SANGSTHA

Shidhulai manages a fleet of solar-powered floating schools, libraries, dispensaries and workshops, and serves around 97,000 families in the Chalan Beel wetland region in the north-west of Bangladesh. A grant helped to fund part of the floating schools programme.

\* Non-exhaustive list



"LUDIS IUNGIT"

### SWITZERLAND FOUNDING OF THE PANATHLON CLUB GENEVA

Supports young athletes in Geneva.



### SWITZERLAND BLAISE LENOIR SCHOLARSHIP

In order to address the shortage of professional training opportunities in Switzerland for young people passionate about working in radio, the Foundation has created a scholarship in partnership with **One FM** to encourage them to pursue a career in this field. The scholarship covers the training costs for one future radio presenter.



### UNITED KINGDOM BROCKWOOD PARK SCHOOL

Support for the school's scholarship programme, member of the Krishnamurti school network.



# SWITZERLAND MARC BIRGKIT SCHOLAR-SHIP - UNIVERSITY OF APPLIED SCIENCES AND ARTS, GENEVA (HEPIA)

Distribution of a scholarship to an engineering student at the University of Applied Sciences and Arts, Geneva (HEPIA).



### SWITZERLAND HUSSENSTEIN SCHOLARSHIP, UNIVERSITY OF GENEVA

In order to support medical students from their first year of study, the Foundation has set up a scholarship system in partnership with the university's Health and Social Services department. The scholarship supports seven students enrolled at the Faculty of Medicine in Geneva.





## FRANCE GUSTAVE ROUSSY

Continued support for the programmes led by the cancer care and research centre.



#### SWITZERLAND FONDATION EGON NAEF

The Fondation Egon Naef pour la Recherche In Vitro (FENRIV) supports researchers and scientists striving to develop effective research techniques that provide an alternative to animal testing. A three-year partnership has been set up with Philanthropia's **Carlo Fund** to reward researchers who have persevered in this field of research.



# FRANCE

Educational therapy programme focusing on cancer-related pain, which aims to provide patients with personalised care.



### INTERNATIONAL UNION FOR INTER-NATIONAL CANCER CONTROL (UICC)

Support for the UICC 'Cancer Control Capacity Building' team, which aims to improve knowledge sharing and enhance communication between the various actors in the fight against cancer.



## SWITZERLAND FONDATION OTIUM

Support for the installation of a care centre in Geneva, which aims to provide practical and psychological support to patients living with cancer and their families, while ensuring their physical well-being in a warm and welcoming environment.



### UNITED KINGDOM ROSETREES TRUST

Rosetrees Trust is a family trust that supports medical research projects across all areas of human health and disease. Support of the lung cancer research project led by Prof. Jane at University College London is ongoing.



### SWITZERLAND PARKINSON SUISSE

Support provided by the **Gustaaf Hamburger Fund** for the publication of the quarterly magazine and the association's solidarity fund.





#### SWITZERLAND CANTONAL HOSPITAL OF LUCERNE

Support from the **Gustaaf Hamburger Fund** for the development of a new application for dexterity training in patients with Parkinson's disease.

### SWITZERLAND UNIVERSITY HOSPITAL OF BASEL

Support from the **Gustaaf Hamburger Fund** for a study on cognitive stabilisation and improvement of the quality of life of patients with Parkinson's disease.





### UNITED STATES SEARIDERS PRODUCTION FOUNDATION – NON-PROFIT 501(C)3 Supported by the Smile Wave

Fund, this community training association in Hawaii encourages youths to take part in a programme designed to help them create small local businesses, and provides training to teenagers and young adults in multimedia and the audiovisual industry.



### SWITZERLAND FONDATION GENEVOISE POUR L'ANIMATION SOCIOCULTURELLE (FASE)

Receives support from the Smile Wave Fund to organise recreational and sports activities for Genevan youths from underprivileged backgrounds.



# SWITZERLAND

This local association, which is specialised in emergency shelter and the integration of people living in precarious conditions, received support over a two-year period to help it launch Le Tunnel, a sociocultural café in the centre of Fribourg.



## SWITZERLAND FUSSBALL CLUB SOLOTHURN

Programme aimed at encouraging children aged four to seven of all genders and cultural and social backgrounds to try out a range of sporting activities in a diverse setting.



### SOUTH AFRICA SURFERS NOT STREET CHILDREN

Organisation for street children in Durban, founded by a social worker. Receives support from the **Smile Wave Fund** to improve the conditions and equipment provided by the organisation.





## FRANCE SOS AMITIÉ

SOS Amitié aims to prevent suicide through a 24-hour telephone helpline. It has received support to help with the creation of a new donation platform and the recruitment of volunteer listeners.

## SWITZERLAND ASSOCIATION PAÏDOS

Support for creative workshops aimed at migrant children and children from Geneva between the ages of 4 and 12. These activities foster integration and cross-cultural interaction. The association brings children together in conjunction with community centres and shelters for asylum seekers. Roughly 500 children can take part in activities to develop their imagination on Saturdays, during the holidays or at birthday parties, whether alone or accompanied by their parents. Forty percent of the children taking part are asylum seekers.





SWITZERLAND

- FONDATION FRANZ WEBER
- PRO NATURA SUISSE
- PROTECTION SUISSE DES ANIMAUX
- WWF SUISSE

These organisations have received unallocated support from the **Klara Jucker-Kurt Fund**.



#### UNITED KINGDOM SEA SHEPHERD

Support from the **Smile Wave Fund** with campaigns to monitor illegal fishing activities.



# INTERNATIONAL

An advocacy, communication and awareness campaign aimed at the government and consumers in China and Vietnam was carried out between 2014 and 2018, in order to reduce demand for products derived from protected species.



# SWITZERLAND OCTOPUS

Development of a pilot programme to better understand the behaviour and habitat of the Mediterranean monk seal, which is classified as "endangered" on the IUCN Red List of Threatened Species.



### ITALY AEOLIAN ISLANDS PRESERVATION FUND

The support provided by the **Smile Wave Fund** enables this charity fund to finance advocacy work aimed at encouraging local political and economic figures to create a marine protected area across the Aeolian archipelago.



DEMOCRATIC REPUBLIC OF THE CONGO AFRICAN PARKS

Support with the purchase of medical equipment for a local dispensary near the Garamba Park National (DRC).



### UNITED STATES WAI'ANAE COMMUNITY RE-DEVELOPMENT CORPORATION 501(C)3

Supported by the **Smile Wave Fund**, this non-profit organisation is based in Maui and runs an initiative offering valuable work experience on organic farms to youths from underprivileged backgrounds.





# FRANCE CHÂTEAU DE VERSAILLES

In the context of the campaign to support the restoration of the Royal Chapel, Pierre Delavie designed a decorative tarpaulin.



### SWITZERLAND GENEVA INTERNATIONAL FILM FESTIVAL AND FORUM ON HUMAN RIGHTS (FIFDH)

Support for an evening debate at the Geneva festival for the promotion of human rights, centred on the climate emergency and the solutions that can be provided.



SWITZERLAND JAZZ 'N' MORE MAGAZINE

Support for this Swiss jazz magazine.



SWITZERLAND PAM (PLATZ FÜR ANDERE MUSIK) FESTIVAL

The **SOMI Fund** provides support to this annual music festival held in Uster (Canton of Zurich).

# A WORD OF THANKS

Our aim in this report was to highlight the work done directly in the field by our partners. We would like to take this opportunity to thank them sincerely for the quality of their work and their projects.

Our donors are thus able to fully quantify the impact of their generosity, which has contributed to changing the fate of humankind all over the world.

We cannot consider unsolicited funding requests from associations. Thank you for your understanding.

Since the mission of Fondation Philanthropia is to serve the philanthropic ambitions of its donors, we adopt a purely proactive approach to identify projects that meet their personal interest areas.

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### PHOTO CREDITS

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