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“WHEREVER THE ART OF MEDICINE IS LOVED, THERE IS ALSO A LOVE OF HUMANITY.”

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**ACKNOWLEDGEMENTS**
An umbrella foundation associated with the Lombard Odier Group and a registered charity, Fondation Philanthropia has been helping its donors carry out their philanthropic initiatives since 2008. We provide support to anyone who wishes to develop a philanthropic project in keeping with their traditions, desires and ambitions. The Foundation offers its donors a legal, financial and philanthropic framework for tailor-made projects.

The year 2020 was marked by the COVID-19 pandemic, which dramatically impacted charitable organisations dedicated to serving society. As early as March, the Board of Trustees sent a message of support to our beneficiaries, offering, if necessary, to reallocate funds to projects directly linked to the health and social crisis or to modify the schedule for the implementation of their projects. A number of our donors were quick to respond, providing targeted and additional support to previously identified partners who were facing significant difficulties in the face of this extraordinary situation. In these uncertain times, it is our responsibility as a grant-making foundation to offer the flexibility that charitable organisations need.

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

In what has been a very challenging year for public health, this report highlights the many ways in which our donors are working to improve the healthcare sector. Indeed, many causes, such as the strengthening of healthcare infrastructures, the education of healthcare workers, and disease prevention programmes, continue to demand significant attention from philanthropists. On behalf of Philanthropia, I would like to thank them for their trust, loyalty and commitment.

In the words of Denis Diderot, “Happiest is he who gives the most happiness to others”.

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

DENIS PITTET
PRESIDENT OF THE FOUNDATION
“I THINK ONE’S FEELINGS WASTE THEMSELVES IN WORDS; THEY OUGHT ALL TO BE DISTILLED INTO ACTIONS WHICH BRING RESULTS.”

FLORENCE NIGHTINGALE (1820–1910)
OVERVIEW OF 2020

OUR ACTIVITY IN 2020

Faced with the COVID-19 crisis, the Board of Trustees sent a message of support to our existing beneficiaries, offering, if necessary, to reallocate funds in response to the crisis or to change the schedule for the implementation of their projects.

At the same time, we helped any donors who wished to do so to decide how to adapt their support or even provide additional resources.

This approach is fully in line with Philanthropia’s positioning, which includes the monitoring of the overall process:

- Identifying the needs created by the impact of the pandemic
- Determining a short-term emergency response
- Contributing to the economic recovery
- Enhancing the resilience of beneficiary organisations

The Soul Expanding Ocean #1:
T aloi Havini exhibition at Ocean Space,
Chiesa di San Lorenzo,
Venice (March-October 2021),
www.ocean-space.org
PHILANTHROPIA  OVERVIEW OF 2020

5 thematic funds

>100 organisations supported*

10% average annual percentage of distribution*

* Since the creation of the Foundation. Amounts in Swiss francs.
The Foundation shared its experience with the Lombard Odier Group by contributing to the publication of a booklet entitled *Providing effective assistance in times of crisis and recovery: a practical guide for philanthropists*. See illustration below.

We aim to continue providing moral and practical support to organisations and donors throughout 2021 in order to best meet the needs of players in the field and to accompany them during the post-crisis period.

“The year 2020 also saw a surge in the number of new donors, as six new sheltered funds were created, focusing on causes such as refugee aid, the conditions of street children and the prevention of heart disease.”

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**FOUR STEPS TO IMPROVE YOUR PHILANTHROPIC RESPONSE TO THE PANDEMIC**

**STEP 1**
Identify the initial situation

**STEP 2**
Determine your emergency response

**STEP 3**
Support the recovery

**STEP 4**
Increase beneficiaries’ resilience
Philanthropia’s donor advisory team also coordinated the publication, in collaboration with the World Health Organisation (WHO) Foundation, of an information booklet on the issue of mental illness in 2020: *Mental health: how can philanthropists make a difference? A Donor’s Guide.*

The context of the pandemic and its repercussions have once again highlighted the urgent need to minimise the impact of mental illness on the well-being of individuals, as well as the need to remove barriers to human development and the functioning of healthcare systems.
“I HOPE THAT SOME DAY THE PRACTICE OF PRODUCING COWPOX IN HUMAN BEINGS WILL SPREAD OVER THE WORLD – WHEN THAT DAY COMES, THERE WILL BE NO MORE SMALLPOX.”

EDWARD JENNER (1749–1823), INVENTOR OF THE FIRST MODERN VACCINE
THE HUSSENSTEIN SCHOLARSHIP CELEBRATES ITS 10TH ANNIVERSARY

HELPING TO TRAIN A NEW GENERATION OF DOCTORS

The Hussenstein Fund celebrated its 10th birthday in 2020. Created by a now-deceased donor, it provides scholarships to students at the University of Geneva’s Faculty of Medicine.

Inspired by a meeting with a doctor, this scholarship aims to remove the financial barriers that some students face when embarking on this long and demanding course of study. The scholarship is also about solidarity: while students must demonstrate academic merit, the scholarship also encourages them to give some of their time by mentoring or providing support to other medical students on a voluntary basis. The scholarship enables students to forgo taking up work alongside their studies, and encourages them to provide tutoring to their peers or to get involved in student life.

To date, the Fund has distributed nearly one million Swiss francs. It is a fixed-term capital fund and is expected to last for another 15 years, distributing approximately 6 to 10 scholarships per year.

“For me, it was a relief to not have that additional stress load.”

PERSONAL ACCOUNTS OF SCHOLARSHIP WINNERS

The Hussenstein scholarship, which I was able to benefit from in 2019–2021, has provided me with a great deal of financial support and psychological relief. The financial contribution from the Foundation helps my parents, who were forced to take early retirements and have not yet been able to return to work. This scholarship allows me to concentrate fully on my studies without constantly worrying about finances. Also, this year has been particularly difficult from a psychological, emotional and physical point of view, following the pandemic. I have found it very difficult to continue tutoring or find another part-time job. Fortunately, the Hussenstein scholarship took some of the pressure off of my job search, and I finally managed to get a job at the Geneva University Hospitals (HUG) as a weekend attendant in the emergency department. This allowed me to keep a bit of a social life and confirmed my choice of a future career in emergency medicine.
Students have been particularly affected by the COVID crisis. The insecurity caused by the sudden loss of jobs and the feeling of isolation and anxiety have increased considerably. Thanks to the support of our generous donors, the University and HES-SO/Genève have been able to implement a veritable “ecosystem” of measures to prevent students from disconnecting psychologically and socially. We are working together to ensure that students can pursue their academic ambitions in the best possible conditions. In addition to student financial aid, which saw the number of beneficiaries increase by 210% in 2020, we have been keen to maintain a remote campus life (sports, cultural events) and preventive health and psychological measures. Looking back on the past few months, we will remember the tremendous solidarity of our donors as well as our university community and the campus, in favour of the younger generation. Through their initiatives and their resilience, students show every day that with a little collective help, they can achieve their dreams even in the most difficult conditions.

In 2020, the harsh reality of life with COVID was imposed on everyone, and students were no exception. Successive lock-downs, distance learning and disrupted exam formats all added to our already heavy mental burdens. In such a volatile environment, it is easy to lose one’s bearings. For instance, many student jobs have been suspended, removing a source of financial stability. As a medical student, I witnessed the health consequences of COVID-19 up close and personal, and it had a profound effect on me. In this anxiety-inducing environment, the support of the Hussenstein scholarship gave me the opportunity to continue my studies in the right conditions. Having already experienced difficult financial situations, it was a relief for me not to have this additional source of stress. In such a crisis, our best resort is to help each other and I am deeply convinced that we will make the best of this situation.
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, donors can create their own personal space – or “sheltered fund” – which operates in a very independent manner, and benefits from the economies of scale produced 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.

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

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.
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.

Thirty-three 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.

**IN FIGURES**

33 donors have created their own fund within Fondation Philanthropia.
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 United Nations Environment Programme Finance Initiative and the United Nations 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.

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.
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.
“HEAL SOMETIMES, SOOTHE OFTEN, LISTEN ALWAYS”

LOUIS PASTEUR (1822-1895)
Valérie Sardaz, Head of the Nursing Department and Céline Delacoste, nurse at the Cardiology Department of the Lausanne University Hospital.
PHILANTHROPY AND HEALTHCARE

Healthcare is a key focus area for philanthropy efforts worldwide. This is particularly the case in developing countries. Foundations, spearheaded by the Bill & Melinda Gates Foundation (BMGF), ranked third in the leading sources of health-related funding between 2013 and 2015 with a contribution of USD 12.6 billion, just behind the United States and the Global Fund to Fight AIDS, Tuberculosis and Malaria. Even though the Gates Foundation accounted for 72% of all foundation contributions, health remains philanthropy’s top supported sector, with particular emphasis on Africa, Asia, and infectious disease control.

However, this broad picture must not obscure the rest of the wide range of health-related causes. For example, non-communicable diseases (NCDs) such as cardiovascular disease, chronic respiratory disease, cancer, diabetes and mental illness, represent a financial burden that could result in a cumulative output loss of USD 47 trillion in the two decades from 2011, equivalent to 75% of global GDP in 2010 (USD 63 trillion).¹

Fondation Philanthropia is particularly active in the following health-related areas: helping to fight cancer through partnerships with the Gustave Roussy Institute, the Curie Institute, and the UICC (Union for International Cancer Control), the latter of which seeks to promote care and capacity building in developing countries; and to combat heart disease, as shown by the examples on the following pages.

In this context, even if donors do not have the same financial means as large foundations, they can also make an impact in one of the four fields illustrated opposite, which represent the main barriers to healthcare access.

² Source: ncdalliance.org
RESEARCH FOR NEW MEDICAL TREATMENTS AND HEALTHCARE DEVICES

Research into new treatments for people living with Osteogenesis Imperfecta [Association Osteogenesis Imperfecta and Institut Imagine]

ACCESS TO HEALTHCARE SOLUTIONS

UICC HPV [Human papillomavirus] and Cervical Cancer Curriculum
Heart failure – the patient at the heart of healthcare management [see example on next page]

PROMOTING ACCESSIBLE AND QUALITY HEALTHCARE SERVICES

The AMREF project in Kenya, which aims to improve access to breast cancer treatment at the local level through mobile health solutions

OVERCOMING FINANCIAL AND BEHAVIOURAL BARRIERS TO HEALTHCARE

Swiss Emergency Responders Association [see example on the following pages]
Save a Life is a volunteer network, operational since October 2019 and coordinated by the Swiss Emergency Responders Association (SERA). In the event of a case of suspected cardiopulmonary arrest (CPA), Save a Life’s first responders are alerted by the CASU 144 (emergency call centre) via an innovative mobile application. They can then travel to the affected person to provide cardiac massage and early defibrillation while waiting for professional help to arrive.

The role of first responders is essential because, in the case of CPA, the chances of survival decrease drastically after 5 minutes. However, the average response time of an ambulance in Geneva is 10 minutes. As a result, of the 230 victims of cardiopulmonary arrest who undergo resuscitation each year in the Geneva region, only about 20 survive in good neurological condition.
Save a Life’s objective is to achieve a first responder response time of 3 minutes in urban areas and 5 minutes in non-urban areas, with a 95% response rate, by 2025. SERA wants to strengthen people’s confidence in their ability to act, in order to increase commitment within its network. To this end, it intends to examine the factors involved in setting up a network of first responders, in order to identify and minimise the factors preventing Geneva’s citizens from taking action.

Over 230 interventions have been carried out by the members of the Save a Life network, which now has more than 1,000 registered first responders. The project has already shown positive results: in January and February 2020, the percentage of patients who experienced a return to spontaneous circulation after resuscitation was around 75% when Save a Life first responders were present, compared to 42% in their absence.
LAUSANNE UNIVERSITY HOSPITAL HEART FAILURE PROGRAMME

Heart failure is a serious chronic disease characterised by severely debilitating symptoms that have a major impact on the patient’s quality of life. It is a disease that is increasing rapidly in industrialised countries. In Switzerland, approximately 200,000 people suffer from heart failure. A significant increase in the number of patients being treated for this issue has been observed in the Cardiology Department of the Lausanne University Hospital (Centre hospitalier universitaire vaudois, CHUV).

The complex nature of managing patients is a major challenge for doctors. The aim of treatment is to improve their symptoms and quality of life, but also to prevent the progression of the disease and its complications. In addition to lifelong medication, patients must adopt a radically different lifestyle and change their habits (diet, physical activity, how they interact with their family, etc.).

The creation of a mobile heart failure clinic managed by a specialised nurse practitioner is an innovative solution that will make it possible to offer an efficient response to the healthcare needs of patients suffering from heart failure. The specialised nurse practitioner will be able to assist in adapting treatments and prescribing laboratory and radiology examinations, but will also be able to offer comprehensive care. This will be done mainly through therapeutic education, which aims to reinforce the patient’s knowledge, for example about his or her diet (in particular, reducing salt intake).

The project began at the end of 2020 and will run for a period of three years. It includes several phases: the training of the specialised nurse practitioner and the nursing and medical teams; the design of the mobile heart failure clinic and its implementation; and lastly, the final assessment of the concept.

This new treatment model will be the first mobile heart failure clinic managed by a specialist nurse practitioner in Switzerland, and could encourage other hospitals in Switzerland to develop this type of practice.
Some statistics on heart failure:

- By 2050, the number of people of retirement age (65 years+) will increase by 69%, from 135,000 to 228,000 in the Swiss canton of Vaud (according to the projected changes in the population of Switzerland and its cantons from 2020 to 2050 provided by the Federal Department of Internal Affairs)

- The number of people suffering from heart failure will therefore increase in the canton of Vaud

- It is estimated that over 800 patients will be treated for heart failure by the cardiology department of the CHUV over the next 5 years

- The specialised nurse practitioner will be able to see an estimated 4 to 6 patients per day
SUPPORTED PROJECTS
EDUCATION AND TRAINING

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.

UNITED KINGDOM
BROCKWOOD PARK SCHOOL

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

* Non-exhaustive list
SWITZERLAND
FOUNDING OF THE PANATHLON CLUB GENEVA

Supports young athletes in Geneva.

DEMOCRATIC REPUBLIC OF THE CONGO
GEORGES MALAIKA FOUNDATION

Project providing education for girls in the Kalubeka region, Katanga, Democratic Republic of Congo. The organisation also provides a community centre so that adults can benefit from certain types of training and come together in a positive environment.

SWITZERLAND
MARC BIRGKIT SCHOLARSHIP - 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
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.
MEDICAL AND SCIENTIFIC RESEARCH

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.

FRANCE
ASSOCIATION DE L’OSTÉOGÉNÈSE IMPARFAITE (OSTEOGENESIS IMPERFECTA ASSOCIATION)

Support for research into new treatment options by Institut Imagine for this rare disease, known as “brittle bone disease”.

INTERNATIONAL FOR INTERNATIONAL CANCER CONTROL (UICC)

Support for “Virtual Dialogues,” a capacity-building platform for UICC members to rapidly adapt services during the COVID-19 crisis.
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.

SWITZERLAND
PARKINSON SUISSE

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

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.

FRANCE
GUSTAVE ROUSSY

Continued support for the programmes led by the cancer care and research centre.
HUMANITARIAN AND
SOCIAL ACTION

UNITED KINGDOM
CHARITIES AID
FOUNDATION

Support for the CAF Coronavirus
Emergency Fund, set up
to provide emergency aid to
charities operating in the UK.

SWITZERLAND
PRO INFRIMIS JURA-
NEUCHATEL

Support for the association’s
psychosocial support fund,
which provides home-based
care for people with disabilities
not covered by social insurance
or the organisation’s funds.

SWITZERLAND
CAPAS

CAPAS (Coordination des
Associations pour l’Aide Sociale),
which federates 35 social
support associations in Geneva,
received support to develop
its coordination and advocacy
activities.
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.

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 conditions and equipment in the organisation’s welcome centre.

SWITZERLAND
CARITAS GENEVA

Support for the social emergency programme during the COVID-19 pandemic.
ENVIRONMENT AND SUSTAINABLE DEVELOPMENT

THE NETHERLANDS
SEa SHEPHERD

The Smile Wave Fund supports the Dolphin Bycatch protection campaign in the Bay of Biscay.

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.

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 International Union for Conservation of Nature (IUCN) Red List of Threatened Species.
These organisations have received unallocated support from the Klara Jucker-Kurt Fund.

UNITED STATES
ONE TREE PLANTED 501 (C)(3)

Non-governmental organisation working towards reforestation in an environmentally-friendly manner. The Smile Wave Fund supports coffee and mixed tree plantations in Rwanda.

INTERNATIONAL
WWF INTERNATIONAL

Support was provided via the Carlo Fund to the establishment and advocacy work of the International Rangers Coalition, an umbrella organisation for the rights and working conditions of park and nature rangers.

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.

DEMOCRATIC REPUBLIC OF THE CONGO
AFRICAN PARKS

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

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

General contribution to the cultural activities of the Foundation, which aims to preserve the architectural and artistic heritage of the House of Alba.

Support for the organisation of Taloi Havini’s exhibition “The Soul Expanding Ocean #1” at the Ocean Space in Venice (March–October 2021).
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.