PHILANTHROPIA
2021 ANNUAL REPORT

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PRESIDENT’S MESSAGE

Since 2008, Fondation Philanthropia, an umbrella foundation created at the initiative of the Lombard Odier Group, has ensured that the philanthropic undertakings of its donors continue to be honoured and passed on to future generations. As a registered charity, Fondation Philanthropia provides its donors with a legal, financial and philanthropic framework that supports them as they pursue their philanthropic goals, creating a new paradigm in line with their values and the fulfilment of their ambitions.

In 2021, as the pandemic raged around the world, the donors of the Foundation continued to pursue their dreams undiscouraged. Two new funds were created. The first will support research into rare or orphan diseases, a topic rarely explored to date by the Foundation. The second newly created fund is dedicated to the conditions refugees face upon arrival in Europe and will provide support to organisations such as SOS Méditerranée and AsyLex.

More than ever, the role of foundations is crucial for social progress. Fondation Philanthropia, as a platform for impact, experimentation and learning, invites donors to benefit from a visionary approach and to adopt a strategic outlook in order to develop their philanthropic project within a stable and solid structure. It serves as an incubator for their initiatives.

While diversity of opportunities is a challenge for philanthropists, some funds are currently thriving. Only a few years after its launch, the KADO Fund (pages 14-15) is experiencing sustained growth both in terms of donations to the fund and distributions to beneficiaries, thanks in particular to the Foundation’s expertise. Philanthropia also welcomes historically autonomous foundations in search of a new lease on life. Under the aegis of Fondation Philanthropia, these foundations are able to regain momentum, allowing them to fully focus on their philanthropic mission by unburdening themselves of any administrative activities.

Donors can thus become ambassadors for the causes they care about. This year, philanthropists have focused on the area of social and economic inclusion, through a combination of emergency aid, integration and accommodation solutions, and entrepreneurial initiatives. On behalf of Fondation Philanthropia, I would like to thank them for their trust, loyalty and commitment. As Voltaire so elegantly phrased it, "the most beautiful gift of humanity is to be able to do good."
“PEACE IS NOT THE ABSENCE OF WAR; IT IS A VIRTUE, A STATE OF MIND, A DISPOSITION FOR BENEVOLENCE, CONFIDENCE, JUSTICE.”

BARUCH SPINOZA
OVERVIEW OF 2021

A STRONGER CAPACITY FOR ACTION

In 2021, the Foundation’s philanthropic advisory team was strengthened by the creation of a new advisory position. With three permanent staff members at its service, the Foundation benefits from support commensurate with its needs.

This means, in particular, that prior to the launch of a project or umbrella fund, the donor’s project is analysed and defined. Subsequently, donors can call on the team’s analytical and research abilities to help them identify and select beneficiaries.

133 mn
in donations received*

71 mn
in grants awarded*

36
sheltered funds*
Lastly, at the end of the philanthropic cycle, the periodic reports and impact analyses provided allow them to monitor the progress and development of their donation portfolio.

As a reminder, donors are entirely at liberty to choose their level of involvement in these processes, based on their availability and preferences in terms of autonomy and their desire to engage with the beneficiaries.

* Since the creation of the Foundation. Amounts in Swiss francs.
The Foundation’s philanthropy advisory team has shared its experience with the Lombard Odier Group by contributing to the publication of a new donor guide: “Children and Youth.”

The third in a series available free of charge, including guides on “Cancer” and “The Environment,” the Children and Youth guide, produced in collaboration with UNICEF, presents a summary of issues related to children: health, education and protection. It also provides concrete examples and case studies to inspire philanthropists.
**Château de Versailles**: Launched in 2018, the restoration of the exterior of the Royal Chapel was completed in 2021. This exceptional building, a true architectural testament to Louis XIV built at the end of his reign, represents the last major addition to the residence designed and commissioned by the Sun King himself. More than 40 years after its last restoration, the Royal Chapel needed urgent work on the roof, stone facing, statues and stained-glass windows.

For more than three years, nearly 150 craftsmen and apprentices worked together to carry out this major heritage operation, which was made possible thanks to the support of Fondation Philanthropia, together with other sponsors (including Saint-Gobain, Dior and JCDecaux).

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**TOTAL ANNUAL DONATIONS OF FONDATION PHILANTHROPIA 2011-2021**

<table>
<thead>
<tr>
<th>Year</th>
<th>Donations (MN)</th>
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<tbody>
<tr>
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<td>5.1</td>
</tr>
<tr>
<td>2011</td>
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</tr>
</tbody>
</table>

**AVERAGE**: 7.3
“NO ONE IS TOO SMALL TO HAVE AN IMPACT AND CHANGE THE WORLD.”

GRETA THUNBERG
INTERVIEW WITH LAURENCE COLLINS, CREATOR OF THE KADO FUND

Created in 2016, the KADO Fund aims to support general interest projects in the fields of social, educational, scientific and cultural development. For example, it supports projects that involve providing assistance to people in economic and social difficulty and improving child education.

WHY DID YOU CHOOSE TO CREATE A DONOR-ADVISED FUND?

My family and I were already involved in supporting various charity projects, especially on a local level. We are particularly sensitive to the plight of refugees arriving in our region and in particular to the manner in which children, whether accompanied by their parents or not, must be cared for. The creation of the KADO Fund (the initials of our four children) has enabled us to plan our donations and above all to create a small portfolio of regular beneficiaries, such as the CAP (certificate of professional aptitude) programmes of Païdos and CuisineLab, two Geneva-based projects for the integration of refugees.
We know the associations personally, as it is important for us to know who is working in the field, and we often follow them for several years, or until the project is completed, in order to have a lasting impact.

If it is possible to go and see the projects in person, we do so as a family. This is the case, for example, with a small dispensary project in Senegal that we are currently studying.

**HOW DO YOU USE THIS FUND?**

The Fund comes with a minor constraint in terms of planning, as we have to follow a formal decision-making process. But this is positive, as we get a second opinion from Philanthropia’s advisors and then validation from its Board.

This reassures us, as we have the guarantee of a formal framework and, if necessary, access to support. In addition, the Foundation puts us in touch with other donors and networks. For example, I am involved in the association “AMusEn” (amusen.ch) which has the ambitious project of creating a Swiss children’s museum in the Geneva region. Philanthropia’s network helps me to establish connections with different parties that could become involved in this project. When the museum hopefully becomes a reality, we can of course support its launch with the Fund. My husband and I continue to make regular contributions to the KADO Fund so that it can continue its activities in the long term.
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.
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-six 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

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.
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.
“WHAT’S IMPORTANT IS THE INDIVIDUAL, NOT THE OBJECT.”

CHARLOTTE PERRIAND
PHILANTHROPY FOR ECONOMIC AND SOCIAL INCLUSION

Social inclusion is a multifaceted and particularly complex topic. Whether it is due to a physical, mental or learning disability, a cultural or language barrier, or a lack of financial security, social exclusion is extremely distressing and has a negative impact on all aspects of life. The importance of feeling cared for and of providing value to those around you is undeniable and many research studies even conclude that it is an absolutely crucial aspect of our health and well-being.

Social exclusion describes a situation where an individual is unable to fully take part in the political, economic or social life within his or her community, which can take its toll on one’s physical and mental health. Moreover, individuals who are well integrated into society contribute positively to their community and social circle.

Society as a whole therefore benefits from the inclusion of all its components, once the major barriers to participation have been removed. While this makes sense intuitively from an economic point of view – each working individual can support themselves and is therefore not a burden on society – there are a multitude of other knock-on effects. Psychological distress, which can lead to violent, delinquent or criminal behaviour, is a good example of how the community and society at large bear the intangible cost of social exclusion.

The opportunity to work is a central issue and opportunities are not equal across the board. Indeed, while gender, skin colour and cultural prejudice are widespread and damaging, their implications are known and clear progress has been made. Discrimination against people with

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1 Eurostat (2022). “Young people – social inclusion”
disabilities, especially young people with mental health problems, is often less well documented, but it is nevertheless striking. In Switzerland, for example, according to data from the Federal Statistical Office, only 72% of people with disabilities were employed in 2019, compared to 87% of people without disabilities. People with disabilities are also much less likely to be employed full-time, even if they are well qualified, available and motivated. Moreover, most of them work in sheltered workshops, which generally implies very little contact with the primary labour market and hence implies less social inclusion.

Lastly, with regard to the inclusion of economic players, it is important to encourage personal and entrepreneurial initiative.

For example, in developing countries there are a number of organisations that facilitate the incubation of social enterprises that contribute to poverty reduction and climate change adaptation (Yunus Social Business). Closer to home, organisations such as Réseau Entreprendre Suisse provide coaching to entrepreneurs.

In this context, donors, even if they do not have the same financial means as large foundations, can also make an impact in one of the above fields (examples provided by Philanthropia).
CUISINE LAB

Founded in November 2016, Cuisine Lab is a Geneva-based association that works towards the socio-economic integration of refugees in the canton. It is fully in keeping with the emerging Swiss social gastronomy movement, which promotes cooking as a vehicle for integration and social cohesion.

AGORA is the flagship project of Cuisine Lab. It is a social restaurant being developed in the heart of the Nations district to serve as a platform for the economic inclusion of Geneva’s refugees, who face an unemployment rate of almost 80%. This establishment, which will open its doors in July 2022, has three objectives:

- First, the social restaurant will promote the refugee population, which is too often stigmatised, through their know-how and their rich and diverse cultures.

- AGORA will provide an opportunity to bring together refugees, international civil servants and other residents of the canton over a meal or during inter-community events, in a spirit of social cohesion and openness.

- It will also offer training in the catering industry for refugees who will be able to work towards obtaining certificates attesting to their skills.
THROUGH AGORA, CUISINE LAB IS WORKING ON A LONG CYCLE OF THREE YEARS DURING WHICH THE FOLLOWING RESULTS ARE EXPECTED:

18 Refugees employed and trained as kitchen staff

36 Refugee interns trained in the basics of the food service industry

50,000+ Delicious meals that reflect the refugees’ identity

www.cuisinelab.ch
www.facebook.com/cuisinelab.ch
ASYLEX

AsyLex is a Swiss non-governmental organisation that provides free online legal advice to asylum seekers and refugees. These services are provided by over 150 volunteers in Switzerland, Lebanon, Greece and Italy, and are coordinated by a small professional team in Zurich. The volunteers work in teams specialising in family reunification, legal assistance and administrative detention.

Since its creation in 2017, AsyLex has provided advice to approximately 5,000 people and has learned that the courts often make hasty decisions with regard to severe human rights violations suffered by asylum seekers. This puts them at immediate risk of deportation to the country responsible for human rights violations such as torture, gender-based violence, racial discrimination, and violations of children’s rights. Challenging national decisions before international bodies is costly and applicants cannot afford it. Thus, many national decisions on deportation, which violate international law, go unchallenged.

Working closely with international human rights experts, in 2020 the volunteer team started to appeal cases of severe rights violations before the European Court of Human Rights and the UN Committees.
The international litigation team focuses on people who have suffered severe violations of their rights:

- Children whose human rights have been violated
- Victims of torture and inhuman treatment
- Victims of severe racial discrimination
- Women and girls who have suffered gender-based violence

To date, in 16 of the 19 cases monitored by AsyLex, provisional asylum measures have been obtained, which represents an exceptional success rate. Through these proceedings, AsyLex not only helps clients in need but also produces case law that will impact the lives of many people in similar situations in Switzerland and abroad.
The Odyssey 2025 project by Handicap International and its partner Mobility Robotics: Use of drones to map areas to be demined in Iraq. Pictured here is a drone being calibrated to recognise different types of munitions. © John Fardoulis/Hi
PHILANTHROPIA

SAMPLE DONATIONS *

EDUCATION AND TRAINING

SWITZERLAND
RÉSEAU ENTREPRENDRE SUISSE

Increase in the resources of the association of French-speaking entrepreneurs seeking to promote the creation of businesses and jobs on a voluntary basis.

UNITED KINGDOM
LODEN EDUCATION TRUST

Programme aimed at promoting entrepreneurial development in Bhutan.

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.

GREECE
METADRASI

Scholarship granted to a refugee followed by the Greek NGO dedicated to helping migrants.

SWITZERLAND
MAROC 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).

CAMBODIA
AGIR POUR LE CAMBODGE (APLC) – SALA BAÏ

Contribution to the salary of the English teacher working in the Sala Baï hotel school in Siem Riep.
Support provided by the Gustaaf Hamburger Fund for the validation phase of a connected training ball to enhance hand mobility in Parkinson’s patients.

Contribution to the “Membership Fund” enabling UICC member organisations to access emergency aid in the context of the COVID-19 pandemic.

Support for the development of the advocacy work carried out by the rare disease umbrella organisation (in partnership with Fondation de Luxembourg).
SWITZERLAND
SWISS EMERGENCY RESPONDERS ASSOCIATION (SERA)
Renewed support for a 3-year period (2019-2021) The Save a Life project aims to increase the survival rate following cardio-respiratory accidents (CAR) occurring in out-of-hospital settings in the canton of Geneva.

SWITZERLAND
RESEAU ROMAND D’ONCOLOGIE (CHUV, HUG)
Renewed support (2020-2022) provided to the care network in French-speaking Switzerland through the integration of artificial intelligence for precision oncology.

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 to 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 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
PROVIDE THE SLIDE

Support provided via the Smile Wave Fund for an initiative to collect second-hand surfboards for use by clubs in Western Africa.

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.
PHILANTHROPIA  
SAMPLE DONATIONS

pro infirmis

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  
HANDICAP INTERNATIONAL SUISSE
Support to a pilot programme on the use of drones to identify areas for demining in Iraq, in partnership with Mobility Robotics.

SWITZERLAND  
LIMMAT STIFTUNG
Co-financing of a child relief project supported by the Limmat Foundation in Zurich. limmat.org

VIETNAM  
BLUE DRAGON CHILDREN’S FOUNDATION
Pilot programme providing psycho-social care for abused children and an emergency programme for the repatriation and housing of young female victims of human trafficking.

SWITZERLAND  
FONDATION CIAO KIDS
Psycho-social and educational support for tribal minorities in two Indian states.
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.

ITALY
SEA SHEPHERD ITALIA ONLUS

Support via the Smile Wave Fund to promote advocacy work and establish a marine protected area around the Aeolian Islands.

SWITZERLAND
ASSOCIATION WONDER FAUNA

Support via the Smile Wave Fund for the production of an environmental awareness documentary.
SWITZERLAND
• FONDATION FRANZ WEBER
• PRO NATURA SUISSE
• PROTECTION SUISSE DES ANIMAUX
• WWF SUISSE

These organisations have received non-earmarked support from the Klara Jucker-Kurt Fund.

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.

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.
Support for the classical music festival.

End of restoration work on the Royal Chapel (see page 11).

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


Support for the classical music festival.


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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.