



Direction

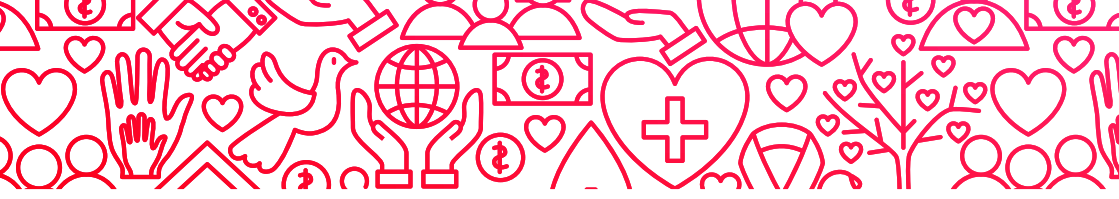
- **Professor Giuseppe Ugazio**, Geneva School of Economics and Management (GSEM) | Geneva Finance Research Institute (GFRI)
- **Laetitia Gill**, Executive Education Associate, Geneva Centre for Philanthropy (GCP)
- **Danièle Castle**, Genevensis Communications

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The philanthropic sector is evolving rapidly in an increasingly complex world. This interdisciplinary course merges traditional approaches to philanthropy with unconventional perspectives. You will acquire state-of-the-art knowledge, skills and best practices to successfully achieve your goals.

Philanthropy has become an increasingly important part of our society over the last twenty years. As its Greek origin indicates, philanthropy has evolved from the love for humanity and has extended to mean the practice of gifting to and helping mankind. The philanthropic sector is witnessing increased professionalization, moving away from traditional charitable giving to more sophisticated strategies. This follows practices from venture capital, impact investment and other business models. In some cases, these strategies pursue objectives in the realm of policy and systems change. In the face of global challenges, philanthropy must demonstrate that it acts for the public good and contributes to the the U.N. Sustainable Development Goals (SDGs).

Worldwide there are some 3.5 million philanthropic entities (OECD, 2020) and in Switzerland alone, where a new foundation is created every day, there are almost 14,000 philanthropic organisations (Rapport sur les fondations, 2021). Swiss foundations have some 30 to 80 billion Swiss Francs in assets. Current and new philanthropic organisations are faced with the challenge of keeping up with the ever-growing variety of actors, missions, and innovative approaches (e.g. donor advised funds, collaborative funds or digitally supported crowdfunding and crowdsourcing).

The proposed DAS in Philanthropy, in collaboration with the Geneva Centre for Philanthropy (GCP), is an executive education programme designed for all those who wish to increase their professional capacity in either learning about aspects of philanthropy, both strategic and operational, or understand how to better operate within the philanthropic environment. We propose a highly structured programme moving from a strategic to an operational view, while providing participants with conceptual and practical instruments to progress independently.



Audience

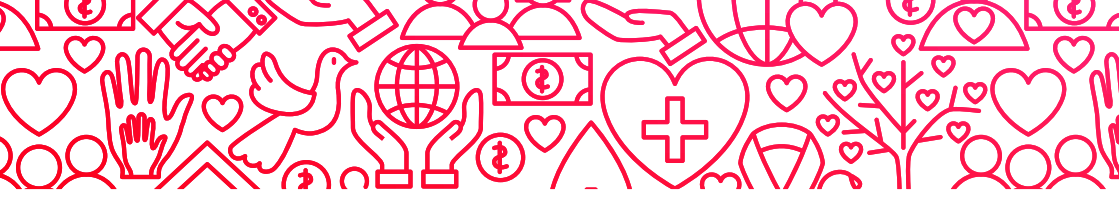
The programme is designed for mid-level professionals involved in national and international philanthropic organisations, corporate philanthropy, single and multi-family offices, as well as those interested in pursuing a career in philanthropic organisations.

Objectives

- Master the complex, multifaceted context of contemporary Swiss and international philanthropy.
- Understand philanthropy from a systemic perspective.
- Learn about the principles, best practices, and key strategic elements to set up and run a structured and professional philanthropic organisation.

Pedagogical Approach

- Blended learning (online and in class): a combination of in-class lectures, supervised group activities, flipped classroom exercises, and other interactive learning activities.
- Online learning consisting of a combination of short pre-recorded videos and interactive webinars.
- Interactive experience-based learning embedding theoretical and practical knowledge.
- Personal work and research.
- On-site visits of key institutions.



Learning Outcomes

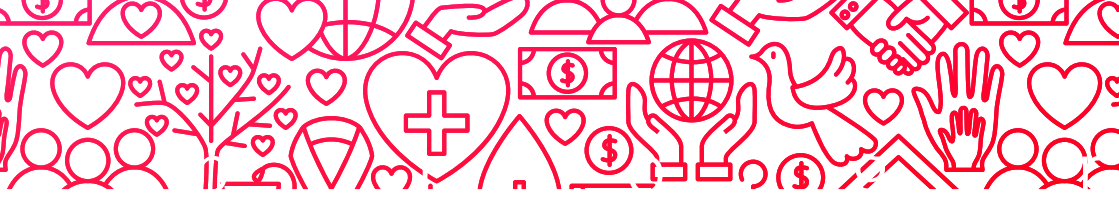
At the end of this course the participants will be able to:

- Understand and master conceptual philanthropy frameworks along with novel financial instruments with special consideration of the U.N. SDG agenda 2030 and ESG metrics.
- Develop an effective theory of change using state-of-the-art tools to implement, monitor, and evaluate the financial and social impact of a philanthropic endeavour.
- Design a philanthropic strategy in line with an organisation's mission, legal and tax parameters, general goals, and specific objectives.
- Master new cutting-edge approaches to philanthropy, including emerging digital technologies.
- Become an inclusive leader who successfully harnesses the potential of staff and volunteers, develops partnerships with public and private actors; and understands both the funder and funding sides of philanthropy.
- Learn how to think critically about philanthropy.

Structure

- **DAS:** 12 modules for a total of 36 ECTS • 256 hours of teaching in class and online* • 534 hours of personal work • 100 hours for final project
• Total 900 hours
- **CAS 1 & 2, each:** 6 modules for a total of 16 ECTS each • 128 hours of teaching in class and online* • 272 hours of personal work • Total 400 hours

* The number of hours of in class and/or online teaching may vary.



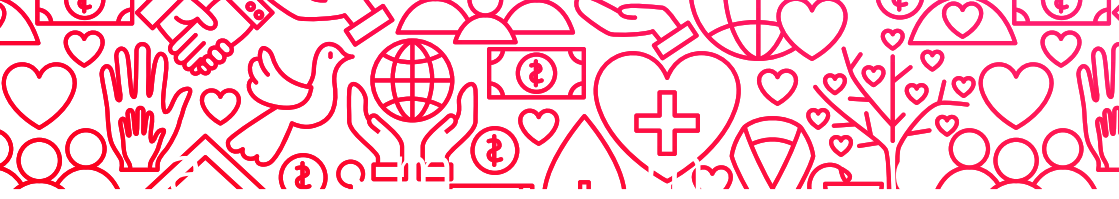
CAS Strategic Philanthropy (16 ECTS) | DAS Part 1

Module 1 |

Introduction to philanthropy and social investment (2 ECTS)

Prof. Giuseppe Ugazio, Assistant Professor, Geneva Finance Research Institute (GFRI), University of Geneva

This module provides participants of different professional, educational, and cultural backgrounds with a common analytical and conceptual framework for philanthropy. It further introduces a definition of public good in relation to the U.N. Sustainable Development Goals (SDGs), examines relevant ethical perspectives for philanthropy, and highlights some of the psychological drivers of philanthropic action. This preparatory work allows to clearly distinguish social investment and philanthropy and to grasp the need to professionalise the philanthropic sector to promote collaborations between different actors. To this end, we examine the opportunities and challenges for philanthropic organisations to partner with grassroots movements, public and private investors through different schemes, such as public-private partnerships (PPP), social impact bonds, or impact investing. In this module, we also introduce concrete examples of how digital transformation and other technological advances contribute to the effectiveness of philanthropic engagement.



Module 2 |

Exploring the diversity and strategies of philanthropic foundations (3 ECTS)

Karin Jestin, CEO, Philanthropic & Humanitarian Initiatives (PHI)

This module prepares participants to address the essential questions of setting up a philanthropic organisation. It showcases how to translate philanthropic ideals, good intentions and moral values into actionable principles defining the essence of a philanthropic organisation. It will address questions such as:

- How detailed should a mission statement be, i.e. what are the trade-offs between specificity and (in) flexibility in the areas in which an organisation sets out to operate?
- What time-frame should it consider?
- What risk mitigation strategies should be put into place?
- What legal options do founders have to allow different degrees of agility for the organisations?

Module 3 |

Legal structuring of philanthropic projects and relevant financial, governance, and tax parameters (3 ECTS)

Prof. Giulia Neri Castracane, Law Department, University of Geneva

According to the purpose of the philanthropic organisation and the country in which it is based, legal possibilities for structure and tax aspects can vary. This module considers available Swiss, European and international philanthropic legal structures, and will focus on those structures available under Swiss law. These range from traditional single purpose forms (foundations and associations) to hybrid (profit/non-profit) models. Innovative contract-based solutions, such as public-private partnerships (PPPs) and impact bonds will also be presented. Tax, governance and financial-related restrictions and/or requirements are addressed when reviewing the various possible structures. Finally, the module also covers data protection and General Data Protection Regulation (GDPR).

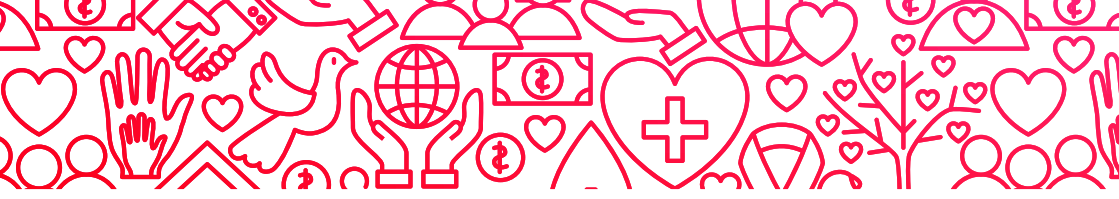


Module 4 |

Theory of change and impact measurement (2 ECTS)

Marta Arranz, Senior Adviser, Monitoring and Evaluation Management, Oak Foundation

This module covers evaluative practices to value, assess and increase the chance of sustainable and fair positive impacts. How can philanthropic organisations know if they are doing the right things and are investing strategically? How can they gather evidence and communicate about their impact to others? Developing a strategy and understanding how to measure its effectiveness is a requirement in today's philanthropic activity. In this module participants will learn how organisations can evaluate their impact, learn from experience and use evidence and insights to inform their decisions. Participants will learn about practical planning tools and frameworks such as logical frameworks, theory of change and theory of philanthropy. They will understand the importance of learning and how it can increase the organisation's effectiveness and programme quality. They will be exposed to different evaluation approaches and will be able to choose the most appropriate one in each case. This module also covers how to identify unintended (potentially negative) consequences of philanthropic interventions and how to best adapt strategies to course-correct in real time.



Module 5 |

Selecting and managing philanthropic projects (3 ECTS)

Nathalie Martens Jacquet, CEO, Make a Wish Switzerland

A rigorous selection of projects in line with the vision and strategy of the organisation is the best way to ensure efficiency and to maintain donor trust. This module therefore looks at a strategic and structured assessment of benefits, risks, collateral efforts and key success factors of each project. We examine how to distribute and coordinate resource allocations across projects, strategies for maximising complementarity between projects, and effective project management. It will include best practices in working with grantees, acknowledging the power dynamic of the funder-donor relationship, using trust and relationship building. The module also proposes monitoring and evaluation tools adapted to different sectors of philanthropy e.g. health, education, poverty reduction, as well as sourcing opportunities, such as using open applications, call for proposals, invite-only etc.

Module 6 |

Leadership and diversity (3 ECTS)

Laetitia Gill, Executive Education Associate, Geneva Centre for Philanthropy (GCP), University of Geneva

For philanthropic organisations to reach their objectives with the minimum operating expense and (on the understanding that engaged employees deliver higher performance) they must ensure that employees are engaged and active. It is crucial for organisations to have an effective Board. This module explains the levers that enable leaders to motivate teams and reassure donors. Understanding what leadership means to different generations, how strong leadership selects diverse teams, how to mobilize and motivate teams, members and volunteers and how to manage in complex situations are all part of this course. When poorly managed, the interaction between Board and staff can be harmful to a philanthropic venture. As such, this module examines how philanthropic boards and staff can interact most effectively. Finally, this module explores how to integrate ethics and what ethics mean for a philanthropic leader.



CAS Operational Philanthropy (16 ECTS) | DAS Part 2

Module 7 |

Human-centric resource structures and processes for philanthropic performance (3 ECTS)

Vindou Duc, Founder, The Nextstep

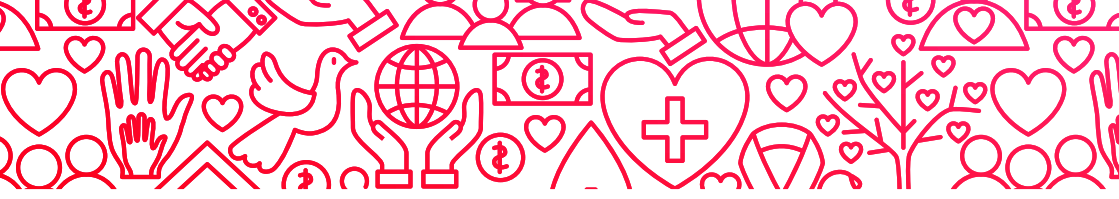
Philanthropic organisations often have limited human resources and need to rely on volunteers and co-optation (e.g. of friends and family members). This module provides the know-how to assess required skills, develop a staff growth plan, and put into place policies that are coherent with the overall philanthropic vision and mission. This module examines human resource management, needs assessment, running volunteer teams, multi-country staff and multicultural settings, to ensure that learning and development is happening at all levels of the organisation. It discusses Swiss and international staffing laws and practices and draws general guidelines for international staff. It also addresses how to motivate and retain volunteers.

Module 8 |

Philanthropic financial management and accountability (2 ECTS)

Karina Vartanova, Financial Manager, World Council of Churches

This module covers basic financial management principles as well as how to create budgets, monitor and control spending, creating financial statements and General Accounting Accepted Principles (GAAP) compliance. It includes information on the structure of financial planning and management of a foundation, depending on: 1) its structure, for example is it a foundation managed into perpetuity or one that is in spend-down? 2) how finances are managed and invested: for example, in-house, with asset managers or as part of holdings in a company? And



3) on the region of activity of the organisation: does it operate nationally, cross-border, both, etc.?. It delivers the means to estimate the sustainability and level of agreement between the mission of a foundation and its investments. Finally, this module examines the impact of cryptocurrencies on current financial practices.

Module 9 |

Interacting with regional philanthropic realities (2 ECTS)

Gul Rukh Rahman, Director, Empowering Families for Innovative Philanthropy (ERFIP) Foundation

Philanthropy frequently operates internationally, interacting with very diverse geographies, cultures, societies and traditions. These are often very different from the backgrounds of organisations' board members, project managers and decisionmakers. To successfully and ethically develop projects across borders and cultures, philanthropic organisations need to build solid relations with local entities, such as grassroots movements or local NGOs. This module focuses on strategies to involve and listen to local entities in the project planning of organisations and analyses to anticipate potential unintended consequences. It also looks at the current debate on the legitimacy of philanthropy which results in well-intended but poorly planned cross-border philanthropic initiatives. Participants will learn how to plan and develop advocacy strategies to engage with local governments and NGOs (including potentially illegal organisations), tailoring these to local traditions and customs, discussing the limitations of a one-size fits all advocacy.



Module 10 |

Partnership development and fund management (3 ECTS)

Armelle Armstrong, Senior Director, Human Rights Watch

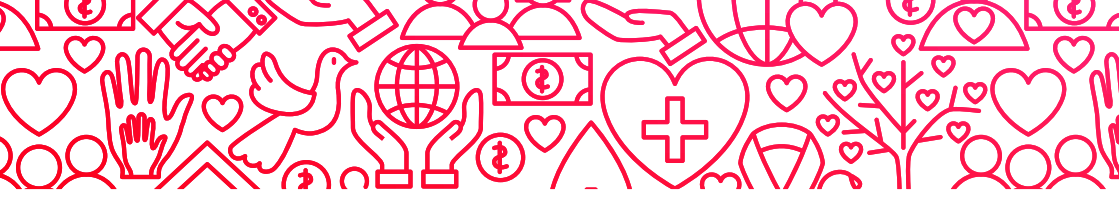
In an increasingly connected world, partnerships, networks and collaborations are essential for garnering funds and in-kind contributions. This module focuses on donor-grantee relationships and understanding grantees' needs. It covers principles for online (crowdsourcing, etc.) and offline (door-to-door, campaigning, legacy, etc.) fundraising. It will explore how to complement for-profit activities to raise funds for non-profit operations and how to integrate new business models within non-profits. This module examines different collaborations, partnership and network models that facilitate impact. It also looks at new and innovative models to build sustainable partnerships, both in kind and financial, between private, and public private partnerships (PPPs), to further philanthropic action.

Module 11 |

Effective communication and negotiation (3 ECTS)

Danièle Castle, Managing Director, Genevensis Communications

Today organisations compete for attention and communication plays a vital role in raising awareness, attracting staff and volunteers, as well as donors. Understanding how to target specific audiences online and offline and craft meaningful messaging and campaigns are a key part of having visibility and reach. This is particularly relevant for organisations whose current projects are frequently international and involve different cultures, geo-political landscapes and religions. It is in such scenarios that the legitimacy of philanthropy and its effectiveness is most likely to be questioned. This module delivers key insights for achieving effective communications, considering, among others, audience segmentation, messaging, and storytelling. It will focus on effective communication both online and offline. Finally, this module discusses how to leverage diversity and cross-cultural settings looking at techniques for conflict resolution and strategies for negotiations with other stakeholders to build successful partnerships.



Module 12 |

Trends in philanthropy: SDGs, innovation, systems change, technology, and your role in the future of philanthropy (3 ECTS)

Silvia Bastante de Unverhau, Senior Advisor, Co-Impact, and Senior Fellow of the Center for Banking and Finance of the University of Zurich

This module covers the role of philanthropic organisations in funding the UN Sustainable Development Goals (SDGs), innovation, scaling and systems change, and examines the role of technology, including Artificial Intelligence (AI). It equips participants with an understanding of the latest trends in philanthropy (including growth, activism, collaboration, diversity and inclusion, and accountability debates). The module will help participants understand the motivation and drivers of philanthropists and foundations and develop their own point of view and role in influencing the future of philanthropy.

Evaluation Methods

The programme has a modular structure with a written evaluation at the end of each module. Participants are required to earn a sufficient grade to pass each module (min. of 4/6) in order to obtain the certificate/diploma. The programme relies on a wide variety of evaluation methods to assess participants' understanding of the course content, which includes open-answer exams, essays, case studies, in-class presentations, and reports. Participants are required to complete both individual and group work.

To obtain a DAS, participants have to write a final report.

Diploma Awarded

DAS in Strategic and Operational Philanthropy

CAS in Strategic Philanthropy

CAS in Operational Philanthropy



Practical Information

Admission Criteria

A minimum of three years' professional experience is required, Bachelor's degree or equivalent. English proficiency is also required.

No prior responsibilities in philanthropy required.

The course is particularly suitable for:

- Family office philanthropy managers
- Managers in philanthropic giving organisations
- Managers in organisations who receive philanthropic giving
- Project managers
- Operational and grantmaking foundation managers
- Social entrepreneurs
- People desirous to enter the field of philanthropy
- Wealth managers interested in integrating philanthropic instruments to their (sustainable) investments portfolios (e.g. blended finance)

Participants or previous editions were employed by a wide range of for-profit and non-profit organisations including large foundations, family offices, banks, INGOS.

Rolling Registration

- Deadline 31 May 2022 | Early bird up to 31 March 2022 (10% discount)
www.unige.ch/formcont/cours/philanthropy

Number of participants: 25 max

Tuition Fee

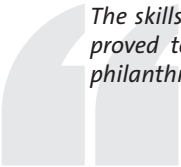
- CHF 14,000.- for the DAS
- CHF 7,500.- for each CAS
- CHF 1,000.- per ECTS if single module (i.e. 3 ECTS = CHF 3,000.-, 2 ECTS = CHF 2,000.-)

Time Schedule and Location

- For 2 ECTS modules: Fridays 08:30 to 17:30 and Saturdays from 08:30 to 17:30
- For 3 ECTS modules: Fridays 08:30 to 17:30 and Saturdays from 08:30 to 17:30 and online
- Uni Mail, University of Geneva

Contact: Philanthropy-gsem@unige.ch

Testimonies



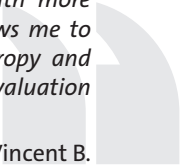
The skills, the awareness and the network I developed through the DAS proved to be invaluable assets in achieving my career pivot towards philanthropy.

Marc-André S

The DAS programme has enabled me to leverage my banking background with my strong involvement in social organisations. How exciting to better understand opportunities, challenges and the evolution of philanthropy while developing a network of professionals who want to make a lasting impact!

Marie-Luce C.

Philanthropy is evolving and it changes the way we work for the public good: more strategic, more inclusive, more collaborative. With more than 20 years experience in this sector the DAS not only allows me to understand and master the fast-changing world of philanthropy and social innovation, it also strengthens my skills in management, evaluation or planning.



Vincent B.

Partnership
Genevensis Communications