DAS
Diploma of Advanced Studies
Diplôme de formation continue

Philanthropy built on 2 Certificates of Advanced Studies (CAS)
September 2021 – August 2022

CAS | Certificate of Advanced Studies
Strategic Philanthropy

CAS | Certificate of Advanced Studies
Operational Philanthropy

Blended Learning

GENEVA SCHOOL OF ECONOMICS AND MANAGEMENT | GSEM
GENEVA FINANCE RESEARCH INSTITUTE | GFRI
GENEVA CENTRE FOR PHILANTHROPY | GCP
This interdisciplinary course merges traditional approaches with unconventional perspectives and delivers state-of-the-art knowledge, models and best practices to enable you to successfully achieve your philanthropic 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 been extended to mean the practice of gifting to and helping mankind. The philanthropic sector is witnessing increased professionalisation, moving away from traditional charitable giving to more sophisticated strategies following principles from venture capital, impact investment and other business models, and in some cases, pursuing grand objectives, in the realm of policy and system change. With the challenges that mankind and the planet face, philanthropy must increasingly demonstrate that it acts for the public good and contributes to the overall progress and outcomes codified in the Sustainable Development Goals (SDGs).

In Switzerland alone, it is estimated that foundations here have some 30 to 80 billion Swiss francs in their assets, three times as much as in Germany, and spend yearly about 1 to 2 billion on concrete projects. The ratio between assets under management and donations is 1-2%, while in England it is 16%. There are more than 13,000 philanthropic foundations in Switzerland, i.e. one foundation for every 650 inhabitants, and a new foundation is created almost every day. New philanthropists risk reinventing the wheel with each one of their actions or wasting a lot of resources (time, money, etc.) looking for information (e.g. legal, marketing) to create and develop their activity, while existing philanthropists and philanthropic organisations are increasingly seeking to maximise their impact.

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 specifically increase their professional capacity in learning about aspects of philanthropy, both strategic and operational, or to understand how to operate better 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 philanthropy in Swiss-based philanthropic organisations, corporate philanthropy and family offices, as well as those interested in pursuing a career in philanthropic organisations.

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

Structure
- **DAS**: 12 modules for 34 ECTS • 176 hours in class • 80 hours online — total 256 hours of teaching • 544 hours of personal work • 50 hours for final project • Total 850 hours.
- **CAS 1 & 2, each**: 6 modules 16 ECTS • 88 hours in class • 40 hours online — total 128 hours of teaching • 272 hours of personal work • No individual project • Total 400 hours (each CAS)

Pedagogical Approach
- Blended learning (online and in class): in class teaching will combine lectures with supervised group activities, reversed class-room exercises, and other interactive learning activities. Online teaching will consist of a combination of pre-recorded videos (duration between 20 and 45 minutes) combined with live teaching.
- Interactive experience-based teaching will combine theoretical and practical knowledge.
- Personal work and research will be required.
- Field visits to foundations will be organised.
Learning Outcomes

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

- Understand and master the knowledge of conceptual philanthropy frameworks as well as differences between private and corporate philanthropy.
- Use strategic and operational tools within their own professional philanthropic fields and evaluate their results.
- Acquire up-to-date knowledge, insights and data about philanthropy in the era of the U.N. SDGs Agenda 2030.
- Understand operational imperatives of philanthropy to successfully put them into practice with particular attention to the SDGs.
- Develop a philanthropic strategy in line with their organisation’s mission and general objectives.
- Master new cutting-edge approaches to philanthropic giving, including venture philanthropy, and impact/sustainable investing.
- Make demanding, sustainable and ethically conscious decisions.
- Propose changes to improve their philanthropic structures and activities for the future.
- Communicate, campaign and form strategy for all stakeholders in a clear and unambiguous manner.
- Know how to operationalise a strategy from the selection and contracting of projects, through monitoring to the evaluation results.
- Understand about project selection and impact.
- Develop skills needed to successfully develop partnerships, with both the public and private sector as well as the essentials of fundraising and fund management.
- Gain insight into the importance of human resources to be most effective.
- Understand both funding and funder sides of philanthropy.
- Know about the legal structuring of philanthropic projects and relevant financial, governance, and tax parameters.
Module 1 | Introduction to philanthropy and social investment
This module provides participants of different professional, educational and cultural backgrounds with a common analytical and conceptual framework which includes an introduction to philanthropy. It examines what the drivers of philanthropy are, what professionalisation of philanthropy entails and the differences between social investment and philanthropy. This module will also span private/family philanthropy, corporate philanthropy, operating foundations, community foundations, social investment and the creation of public-private partnerships (PPP). It will also introduce new modules of philanthropy and finance oriented towards the SDGs.

Module 2 | Defining a coherent philanthropic project, in light of a foundation’s context of creation
This module prepares participants to address the most essential questions of setting up a philanthropic organisation. It will showcase how to translate philanthropic ideals, good intentions and moral values into actionable principles defining the essence of a philanthropic organisation. We will address questions such as: how focal 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 it should consider, what risk mitigation strategies it should put into place and what legal options founders have to allow different degrees of agility to the organisations.
Module 3 | Leadership and diversity

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 mobilise and motivate teams, members and volunteers and how to manage in complex situations are all part of this course. The interaction between Board/staff when badly managed can be harmful to a philanthropic venture, so this module also examines how philanthropic boards and staff interact most effectively. Finally, this module explores how to integrate ethics and what ethics means for a philanthropic leader.

Module 4 | Managing for impact: Evaluative practices to value, assess and increase the chance of positive impacts that endure

Developing a strategy and understanding how to measure its effectiveness is a requirement in today’s philanthropic activity, as more and more organisations compete for money and attention. In this module participants will learn how organisations evaluate their impact and what theories of impact measurement exist, beyond simply fixing strategy, objectives and outcomes. Participants will learn to set up their organisation’s “theory of change”, understand the differences between inputs, outcomes, outputs, and impact, and how to measure each of these. They will learn about logical frameworks and other tools that organisations use. This module also covers the unintended (potentially negative) consequences of philanthropic interventions.
Module 5

Selecting and managing philanthropic projects

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

Legal structuring of philanthropic projects and relevant financial, governance, and tax parameters

According to the purpose of the philanthropic organisation and the country in which it is based, legal possibilities for structure and tax aspects will vary. This module will consider 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 will be addressed when reviewing the various possible structures.
Staffing and outsourcing in philanthropy

As many Swiss foundations are small, and often friends and family are co-opted, 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 will examine human resources 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 will examine Swiss staffing laws and practices and draw general guidelines for international staff. It will also address motivating and retaining volunteers.

Philanthropic financial management and accountability

This module will cover basic financial management principles as well as how to create budgets, monitor and control spending, creating financial statements and GAAP compliance. It will include information on the structure of the financial planning and management of a foundation, depending on its structure (is it a foundation managed into perpetuity or one that is in spend-down?), on how finances are managed and invested (in-house, with asset managers or as part of holdings in a company?), and on the region of activity of the organisation (does it operate nationally, cross-border, both?). It will also deliver the means to estimate the sustainability and level of agreement between the mission of a foundation and its investments.
Module 9 | **Interacting with regional philanthropic realities**

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 decision makers. To successfully and ethically develop projects across borders and cultures, philanthropic organisations need to build solid relations with local entities, such as grass root movements or local NGOs. In this module we focus on strategies to involve and listen to these local entities in the project planning of organisation and analyses to anticipate potential unintended consequences. This module further looks at the current debate on the legitimacy of philanthropy which results in well-intended but poorly planned cross-border philanthropic initiatives. We will also 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**

In an increasingly connected world, partnerships, networks and collaborations are essential to garnering funds and in-kind contributions. This module will focus on donor grantee relationships and understanding grantees’ needs. It will cover 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 will examine 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 also private and public (PPPs) to further philanthropic action.
Module 11 | Effective communication and negotiation

In a world where organisations compete for attention, communications fulfil vital roles in raising awareness of issues and solutions, attracting staff and volunteers, and donors. Understanding how to target specific audiences 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, geopolitical 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. Here we focus on effective communication both online and off-line. 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

This module introduces the SDGs and discusses key trends in philanthropy, looking at the role of philanthropic organisations in funding innovation, systems change and leveraging technology (e.g. artificial intelligence). It also covers emerging trends in philanthropy (e.g. growth, activism, collaboration, new models, diversity, inclusion) and how philanthropy is practised differently around the world. The module will help you understand the motivation and drivers of philanthropists and foundations and develop your own role influencing the future of philanthropy.
Evaluation Methods

The programme has a modular structure that requires group and individual projects throughout the curriculum. A written examination will take place at the end of the course. The evaluation of participants is determined as follows: 40% of the final grade will be given by a group activity requiring participants to set up a new foundation/project, demonstrating that they have acquired the key concepts taught during the modules. 10% of the final grade is given by the active in-class participation throughout the course. Another 10% of the final grade will be assessed based on an individual presentation in class discussing the material discussed during the courses. The final exam will determine the final 40% of the grade and will consist of 2 (for the CAS) or 4 (for the DAS) open questions (i.e. short essays) assessing the understanding of the key concepts of the modules attended in the CAS/DAS.

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, a Bachelor’s degree or equivalent and English proficiency.
Participants without responsibilities in philanthropy may be admitted on the basis of other comparable and relevant experience:
- Family office philanthropy managers;
- Managers in philanthropic giving organisations;
- Managers in organisations which receive philanthropic giving;
- Project managers;
- Operational and strategic foundation managers;
- Social entrepreneurs;
- People wishing to enter the field of philanthropy;
- Wealth managers interested in integrating philanthropic instruments to their (sustainable) investment portfolios (e.g. blended finance).

Application and Deadline
- Online application may be submitted via the course website at: www.unige.ch/gsem/philanthropy
- Registration deadline: 31 May 2021 / Early bird: 31 March 2021 10% discount (for the DAS and CAS alike)
Number of participants: 25

Tuition Fee
- CHF 14,000.- for the DAS
- CHF 7,500.- per single CAS
- CHF 1,000.- per ECTS if single module (i.e. 3 ECTS = CHF 3,000.-, 2 ECTS = CHF 2,000.-) Module 1, 2, 8, 12 = 2 ECTS. All other modules = 3 ECTS

Time Schedule and Location
- For 2 ECTS modules: Fridays and Saturdays
- For 3 ECTS modules: Fridays and Saturdays
- Uni Mail, University of Geneva and online

Partnership: Genevensis Communications
Direction

- **Professor Giuseppe Ugazio**, Edmond de Rothschild Foundations Chaired Assistant Professor in Behavioral Philanthropy; Geneva School of Economics and Management (GSEM) / Geneva Finance Research Institute (GFRI)
- **Laetitia Gill**, Executive Director, Geneva Centre for Philanthropy (GCP)
- **Danièle Castle**, Founder, Genevensis Communications

Advisory Board

- **Helen Alderson**, Head of Regional Delegation to the UK and Ireland International Committee of the Red Cross (ICRC)
- **Cheryl Chang**, Chief of Staff, Oak Foundation
- **Alexandre Epalle**, General Director of Economic Development, Research, and Innovation of the Republic and Canton of Geneva
- **Aline Freiburghaus**, Director Romandie at SwissFoundations
- **Thierry Renaud**, Director, Impact and Sustainability, MAVA Foundation
- **Isabell Ries-Bowman**, Partnership Manager, World Economic Forum (WEF)

Coordination

**Benoit Moget**, Geneva School of Economics and Management (GSEM)

Contact

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Welcome to the World of GSEM Executive Education!

Discover GSEM Executive Education vast offer from business-oriented to non-profit organizations executive programs that will help you to develop your management skills. Let us meet today’s and tomorrow’s complex challenges together.

Professor Marcelo Olarreaga, Dean GSEM, University of Geneva
Philanthropy refers to charitable acts or other good works that help others or society as a whole, without requiring something in return.