



Direction

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- **Laetitia Gill**, Executive Education Associate, Geneva Centre for Philanthropy (GCP)
- **Danièle Castle**, CEO, Genevensis Communications

Advisory Board

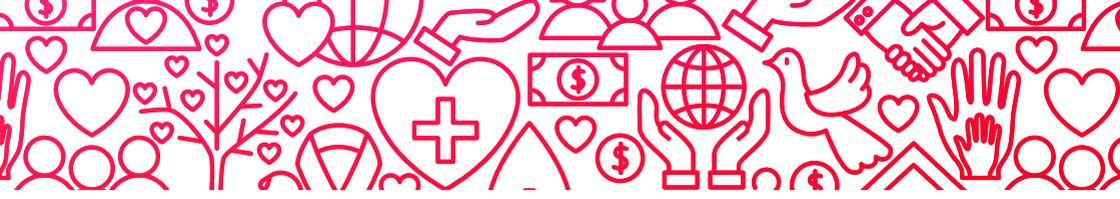
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Speakers

UNIGE professors, lecturers and researchers; professionals in the practice of philanthropy from Switzerland and abroad.



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.

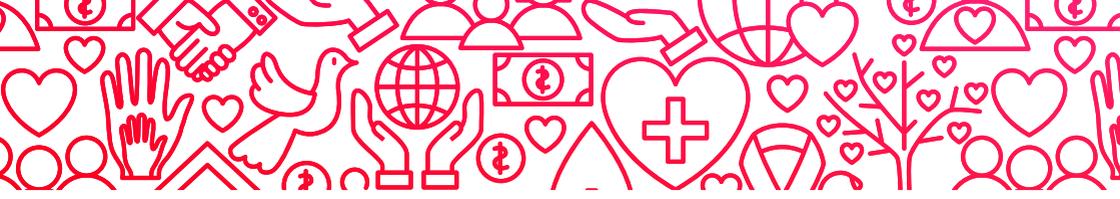
Graduates of previous editions were employed by a wide range of for-profit and non-profit organisations including large foundations, family offices, banks, INGOs.

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, 10 modules - 3 days each, online and in person (2 days).
- Interactive experience-based learning embedding theoretical and practical knowledge.
- On-site visits of key institutions.
- Online learning consisting of a combination of short pre-recorded videos and interactive webinars.
- Guided personal research work developing critical thinking skills.
- Learning from leading international academics and professional experts.



Learning Outcomes

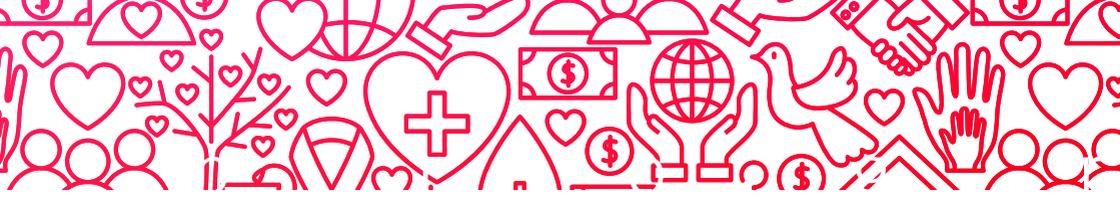
At the end of this course the participants will be able to:

- 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 grantee sides of philanthropy.

Structure

- **DAS:** 10 modules for a total of 34 ECTS • 240 hours of teaching in class and online* • 460 hours of personal work • 100 hours for final project
• Total 800 hours
- **CAS 1 & 2, each:** 5 modules for a total of 15 ECTS each • 120 hours of teaching in class and online* • 230 hours of personal work • Total 350 hours

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

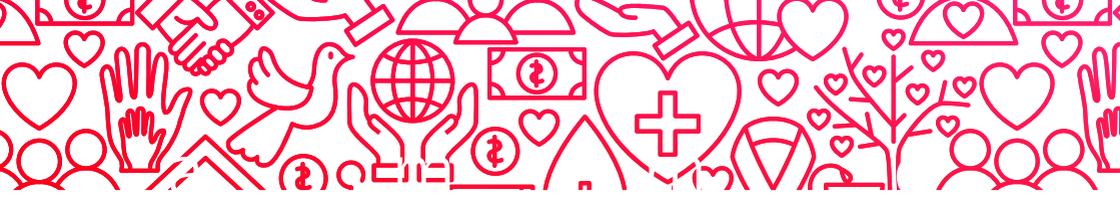


CAS Strategic Philanthropy (15 ECTS) | DAS Part 1

Module 1 |

Introduction to philanthropy and new financial instruments (3 ECTS)

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, and public and private investors through different schemes, such as 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)

This module invites participants to investigate the diversity of grant-making foundations (family-led foundations, institutional foundations, corporate giving programmes, regranting entities, umbrella foundations, etc.). It will showcase how to translate motivations and societal aspirations into coherent philanthropic initiatives and question what may limit a foundation's latitude to operate strategically. It will further explore different approaches to creating value and review recent trends and developments in the practice of philanthropy, such as investing in organisational development, adopting grantee-led approaches, working through funders' collaboratives, and the need for evidence-based interventions.

Module 3 |

Legal structuring of philanthropic projects (3 ECTS)

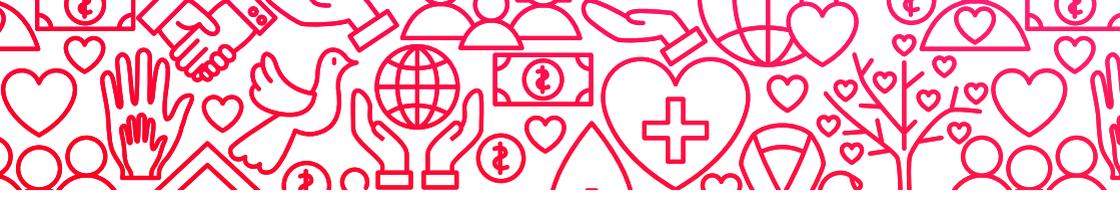
According to the purpose of the philanthropic organisation and the country in which it is based, legal possibilities for structure and tax aspects can vary. This module considers available Swiss, European and international philanthropic legal structures, and will focus on those structures available under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



Module 4 |

Selecting, managing, and negotiating philanthropic projects (3 ECTS)

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 donors' 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 manage philanthropic projects effectively in terms of resource allocations, coordination, impact and relationship with the donors. It will include best practices in working with grantees, the expectations of grant-givers and how they select the projects to be supported. The module also proposes a win-win model of how to negotiate successfully, within a project, with multiple stakeholders, or elsewhere.



Module 5 |

Theory of change and impact measurement (3 ECTS)

How can philanthropic foundations and investors know if they are both having the impact they hope for and investing strategically? How can they collect evidence, learn and adapt, and communicate effectively 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 highly practical module, participants will learn how organisations can evaluate their impact, learn from experience and use evidence and insights to inform their decisions. This module introduces participants to planning, learning and evaluation in philanthropic strategies and initiatives. Participants will learn about different evaluation approaches and how to select the most appropriate ones depending on the context, purposes, and available resources. They will also use planning tools and frameworks such as results frameworks, theory of change and theory of philanthropy and will be introduced to the concept and tools of emergent learning. They will understand the importance of strategic learning and how it can increase the organisation's effectiveness and programme quality.



CAS Operational Philanthropy (15 ECTS) | DAS Part 2

Module 6 |

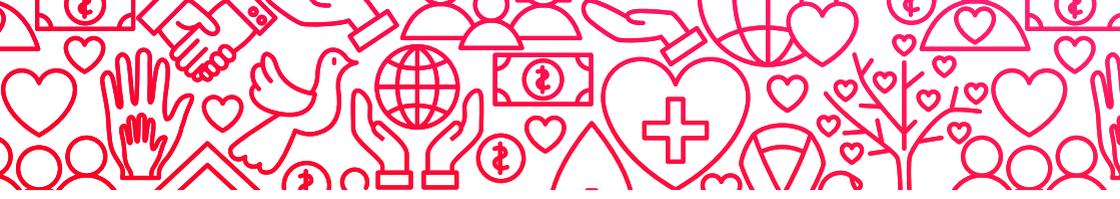
Inclusive leadership, Board management and HR (3 ECTS)

To face current and future global challenges, the philanthropy sector needs strong and inclusive leadership as well as skilled teams of employees and volunteers. How can diversity be a major driver of innovation and success for more social and sustainable justice? This module provides the know-how on inclusive leadership and diversity, on how philanthropic boards and staff can interact most effectively, ensuring the wellbeing of their teams and by extension those of their beneficiaries. It examines human resource management, needs assessment in line with the mission of the organisation, running volunteer teams, multi-country staff and multicultural settings, to ensure that learning and development is happening at all levels. It also addresses how to motivate and retain volunteers. Finally, this module explores how to integrate ethics and what ethics means for a philanthropic leader.

Module 7 |

Philanthropic financial management and accountability (3 ECTS)

This module tackles the challenge for non-profit foundation executives to strike a balance between creating public value and managing the bottom line. It is designed to help foundation executives understand the tools, techniques and concepts of good financial management and investments. Guided by experts in finance and accounting, participants will develop analytical skills for understanding their financial position more fully, their audited financial statements and learn



to identify threats to the financial sustainability of their organization. They will also learn how the effective use of budgeting and cash-flow planning can enhance their ability of creating value. Finally, based on the financial assessment of their organization, they will learn how to optimally structure their financial investment portfolio.

Module 8 |

Regional philanthropic realities, building alliances and joining local networks (3 ECTS)

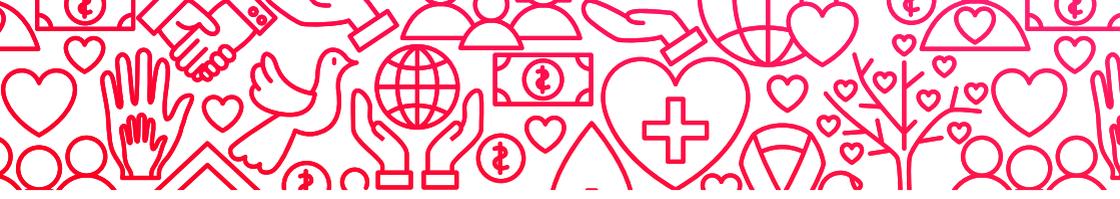
Philanthropy frequently operates internationally, interacting with very diverse geographies, cultures, societies and traditions. These are often very different from the backgrounds of organisations' board members, project managers and decision-makers. To develop projects successfully and ethically across 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 9 |

Communication and resource mobilisation (3 ECTS)

Partnerships are essential to garnering funds and in-kind contributions, including time, expertise, and personal networks. The spirit of this module is to move away from money-centred fundraising and to focus on collaborative and transformational donor-grantee relationships leading to sustainable financing. It will cover the proven fundamentals of private fundraising, including building donor loyalty through state-of-the-art donor journeys; sourcing philanthropic partners; fundraising resources; motivations for giving; offline fundraising models; digital fundraising. It will explore other funding models, such as public-private partnerships, as well as fundraising innovations that can help non-profit organisations raise funds in new ways and reach new, diverse audiences. 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. This module delivers key insights for achieving effective communications, considering, among others, audience segmentation, messaging.



Module 10 | **Trends in philanthropy (3 ECTS)**

This module focuses on equipping participants with an understanding of the latest and emerging trends in philanthropy. It covers the role of philanthropic organisations in funding scale and systems change, and discusses trust-based philanthropy, collaborative philanthropy, and justice, diversity, equity and inclusion in philanthropy among other trends. It also examines the role of technology, including Artificial Intelligence (AI) with respect to the practice of philanthropy. This module will help participants understand the key trends and proactively consider how they can have an impact on their organisations.



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Evaluation Methods

The programme has a modular structure with an 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.

In-person participation is mandatory.

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

Diploma Awarded

- Diploma of Advanced Studies (DAS) in Strategic and Operational Philanthropy (built on 2 CAS)
- Certificate of Advanced Studies (CAS) in Strategic Philanthropy
- Certificate of Advanced Studies (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 mandatory.

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 strategic 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)



Rolling Registration

To participate in the 2023/2024 edition, registrations must be submitted by **31 July 2023**. Registrations received after this date may be considered for the following edition.

www.unige.ch/formcont/en/courses/philanthropy

Early bird (15% discount) for registration before 31 May 2023

Number of participants: 25 max

Tuition Fee

- CHF 14,000.- for the DAS
- CHF 7,500.- for each CAS
- CHF 3,000.- for a single module

Time Schedule and Location

Fridays and Saturdays from 08:30 to 17:30

- University of Geneva

Contact

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Partnership

Genevensis Communications

Supported by

Julius Baer Foundation

Porticus Foundation

Testimonials

The DAS in Strategic and Operational Philanthropy is an immersion into the third sector, taught by top-tier lecturers with international exposure and expertise. The DAS is an excellent way to broaden your knowledge within your current field or to change careers. I personally enjoyed the journey and would recommend it to any professional up for the challenge!.

Adrian G.

Following the Operational Philanthropy CAS in Geneva has given me access to course material and presentations from hands-on specialists providing in-depth and very tangible analysis of contemporary Philanthropy. This exhaustive curriculum coupled with the rich exchanges from the professionally diverse student body is for me the perfect match. I definitely recommend this to anyone wanting real-life Philanthropy exposure and training.

Ilham 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. Whilst I have 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.