



LOMBARD ODIER

FONDATION

MEDIA RELEASE

Geneva, 27 September 2019

First-ever evaluation of vitality of lemanic philanthropic sector published

Analyses Health and Dynamism of Sector and Provides Recommendations for Future Action

A series of prestigious academic institutions, foundations, and philanthropic sector partners, has today launched a ground-breaking study of the vitality of the philanthropic sector in the Lemanic region, at the initiative of Fondation Lombard Odier.

The rigorous study, titled [*Doing Better, More Efficiently: Measuring and Enhancing Philanthropic Vitality*](#) and carried out to mark Fondation Lombard Odier's 15th anniversary, follows in the footsteps of the 2010 study, *Advancing Philanthropy in Switzerland*.

Based on a comprehensive analysis of quantitative and qualitative data, and a holistic framework that captures the different indicators that jointly determine philanthropic vitality, the study not only takes stock of the state of philanthropic vitality in the region today, but also identifies strategic opportunities to further enhance the dynamism of the sector.

Reflecting the diversity of the region and its organisations, the study is the fruit of a collaboration between the private sector, academia, the cantonal governments of Geneva and Vaud, and the philanthropic sector itself. Several foundations, spanning both the French- and German-speaking regions of Switzerland, funded the work. The project's Steering Committee includes representatives of Fondation Lombard Odier, SwissFoundations, proFonds, the Centre on Philanthropy of the University of Geneva, the Center for Philanthropy Studies at the University of Basel, FSG, and the Directorate General for Economic Development, Research, and Innovation of the Canton of Geneva.

Key findings of the study include the presence of very high levels of public trust in the philanthropic sector in the Lemanic region, as well as a system of fiscal incentives conducive to encouraging donations. To further enhance the cluster's attractiveness, the Lemanic philanthropic sector would benefit from strategic



LOMBARD ODIER

FONDATION

action to align cantonal best practices and procedures, accelerate the trend towards transparency, promote board and staff education, accelerate the growth of umbrella foundations, and communicate sector needs and opportunities to enhance its vitality. Assembling a coalition of funders for the vitality of the Lemanic philanthropy hub would be a logical step to co-ordinate these actions.

The study's Steering Committee envisages the assessment as a proof of concept for a new methodology for assessing philanthropic vitality, which could be repeated regularly in the future to assess progress and change over time. In addition, one of the reasons for including Swiss German organisations in the Steering Committee was to lay the groundwork for the future expansion of the study to cover the entirety of Switzerland.

Patrick Odier, President of Fondation Lombard Odier, said that *“we are proud to have acted as the incubator and facilitator of this pilot project and hope that it will inspire others to take a similarly strategic approach to the development of their philanthropy ecosystems. Additionally, we hope that the approach could be extended to cover the rest of Switzerland in the future. The unprecedented series of partnerships at the heart of the work is an inspiring example of the ‘spirit of Geneva,’ and represents a continuation of Lombard Odier’s tradition of leadership in philanthropy.”*

Dr Claudia Genier, Deputy Director of SwissFoundations, and **François Geinoz, President of proFonds**, pointed out that *“philanthropic action is crucial to an equitable and sustainable society in the 21st century. The vitality study represents an important step towards providing us with the tools to continuously improve the enabling environment of philanthropy.”*

Professor Henry Peter, Head of the Geneva Centre on Philanthropy (GCP), said: *“Just two years after the launch of the Centre, we are delighted to provide world-class research and education on philanthropy in the region. Via this project, we have piloted a methodology that enables us to take our understanding of the sector and the interactions among its players to the next level.”*

Marc Pfitzer, Managing Director at FSG, found that *“a Lemanic philanthropic hub is both an aspiration and a reality, in tune with the region’s legacy as a global centre of human solidarity: a vitality assessment is about being rigorous in shared measurement and learning to fulfil that vision.”*

Alexandre Epalle, Director General, Directorate General for Economic Development, Research, and Innovation, République et Canton de Genève, complimented the project team for *“highlighting the core strengths of the philanthropic sector in Geneva and the Lemanic region, for which the region is internationally renowned. Such research will contribute to further professionalising the sector, not only*



LOMBARD ODIER

FONDATION

creating increased impact for beneficiaries, but also adding to both the intellectual dynamism and the sustainable economic and financial innovation development of the region.”

Commenting on the structure and goals of the project, **Dr Maximilian Martin, Global Head of Philanthropy at Lombard Odier**, and Chair of the Steering Committee, added that *“the unique methodology builds on the learnings from the past decade of professionalization of philanthropy. It will enable us to define fact-based strategies to develop the ‘competitiveness’ and viability of the philanthropic cluster, seize opportunities such as digital transformation, and ultimately direct philanthropic resources where they make the greatest difference.”*

The entire study is available online at www.philanthropic-vitality.ch.

-ends-

About Fondation Lombard Odier

The Foundation funds forward-looking solutions to pressing challenges in the fields of education and humanitarianism. Its goal is to work with grantees where it can have an impact and offer more than just money. The Foundation also contributes to developing the philanthropic sector as a whole, to amplify its potential to improve society for decades to come. It is a founding partner of the University of Geneva’s Centre for Philanthropy, where it promotes research, knowledge dissemination, awareness and dialogue between professionals and stakeholders taking philanthropy into the future. The Foundation is also actively involved in collaborative platforms such as SwissFoundations, the European Foundation Centre and the European Venture Philanthropy Association.

About the other partners

SwissFoundations was created in 2001 at the initiative of eleven foundations. It represents grant-making Swiss charitable foundations and gives them a strong and independent voice. With its active and innovative network, SwissFoundations promotes the sharing of experiences, transparency, and professionalism among Swiss charitable foundations. The association welcomes foundations large and small, which work regionally or internationally and which are domiciled in Switzerland or in Liechtenstein.





LOMBARD ODIER

FONDATION

proFonds is the trade association for all types of charitable foundations and associations in Switzerland. The organisation defends the interests of grant-making and operational foundations and associations, whether self-financed or financed by gifts, across all sectors. proFonds acts as a lobbyist vis-à-vis politicians, legislators, and administrations. It advocates for general operating conditions and regulations that permit charitable foundations and associations to perform their tasks successfully. As a service provider, proFonds also encourages charitable organisations to share knowledge and experiences, both among themselves and with the general public.

The Geneva Centre for Philanthropy (GCP), part of the University of Geneva (UNIGE), was created to support the international expansion and outreach of philanthropy in the Lake Geneva region. The centre specialises in inter-disciplinary research and teaching in philanthropy together with knowledge transfer. The GCP is a public-private partnership between UNIGE and a number of major Swiss-based foundations. The centre aims to encourage research and academic training in philanthropy and to ensure that knowledge is transferred to meet the needs of practitioners and the Geneva region.

The Center for Philanthropy Studies (CEPS) of the University of Basel is an interdisciplinary research and executive education institute, specialized on the non-profit sector and dealing with the multifaceted topic of philanthropy. The institute was established in 2008 through an initiative by SwissFoundations, the Association of Swiss Grantmaking Foundations. The aim of the CEPS is to improve both the scientific foundation of and the knowledge about philanthropy. Furthermore, the CEPS provides a direct benefit for foundations and other non-profit organizations through executive education and coaching.

FSG is a mission-driven consulting firm. They are experienced advisors to corporate, foundation, and nonprofit/NGO leaders. Through their combination of customized consulting services, powerful insights, and ground-breaking initiatives, they help clients around the world create social impact. FSG was founded in 2000 by Harvard Business School Professor Michael E. Porter and Mark Kramer to help foundations create more effective strategies and impact beyond their grant dollars. Today, they are a global firm of 160 people in 6 offices on 3 continents.

The **Directorate General for Economic Development, Research, and Innovation (DG EDRI)** is part of the government of the Canton of Geneva. DG EDRI fosters and strengthens Geneva's economic ecosystem and positions it to benefit from the opportunities of the digital age as well as the emergence of sustainable development economics. It builds bridges between Geneva's diverse clusters and its unparalleled network of multilateral governance actors. The DG EDRI also takes steps to strengthen Geneva's USP and reinforces the links between economic development and research to create conditions favouring entrepreneurship, the emergence of new sources of growth as well as innovation.





LOMBARD ODIER

FONDATION

Lombard Odier Group
Rue de la Corraterie 11
1204 Geneva – Switzerland
www.lombardodier.com

Julien de Weck
Media relations
Tel.: +41 22 709 25 47
j.deweck@lombardodier.com

Andreas Kessler
Media relations
Tel.: +41 44 214 15 06
an.kessler@lombardodier.com

Important Information

This media release has been prepared by Bank Lombard Odier & Co Ltd, a bank and securities dealer authorised and regulated by the Swiss Financial Market Supervisory Authority (FINMA) (hereinafter "Lombard Odier"). It is not intended for distribution, publication, or use in any jurisdiction where such distribution, publication, or use would be unlawful, nor is it aimed at any person or entity to whom it would be unlawful to address such a document. This media release is provided for information purposes only. It does not constitute an offer or a recommendation to enter into a relationship with Lombard Odier, nor to subscribe to, purchase, sell or hold any security or financial instrument.

This document may not be reproduced (in whole or in part), transmitted, modified, or used for any public or commercial purpose without the prior written permission of Lombard Odier.

© 2019 Bank Lombard Odier & Co Ltd – All rights reserved

SwissFoundations

