

# Philanthropy

## Good ideas and new ideas

A report from Families in Philanthropy 2010



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**A report from Families in Philanthropy 2010**

Geneva, Switzerland

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## *Foreword by Alain Mérieux*



**B**y creating the Les Pensières Conference Centre, my father, Doctor Charles Mérieux, fulfilled a vital requirement for interactions and discussions between people from around the world working together with the same objective. The opportunity to share experiences, values and ideas is essential and this is what brought us together for Families in Philanthropy this autumn.

The value of exchange should not only be at the heart of every sector, it is the key for improvement at all levels. By discovering new ideas and sharing our experiences and our challenges we can better nourish our reflections.

Philanthropy has been important for my family for generations and I hope this compilation of key messages will capture the spirit of our meeting.

Warm regards,

Alain Mérieux

# 1.

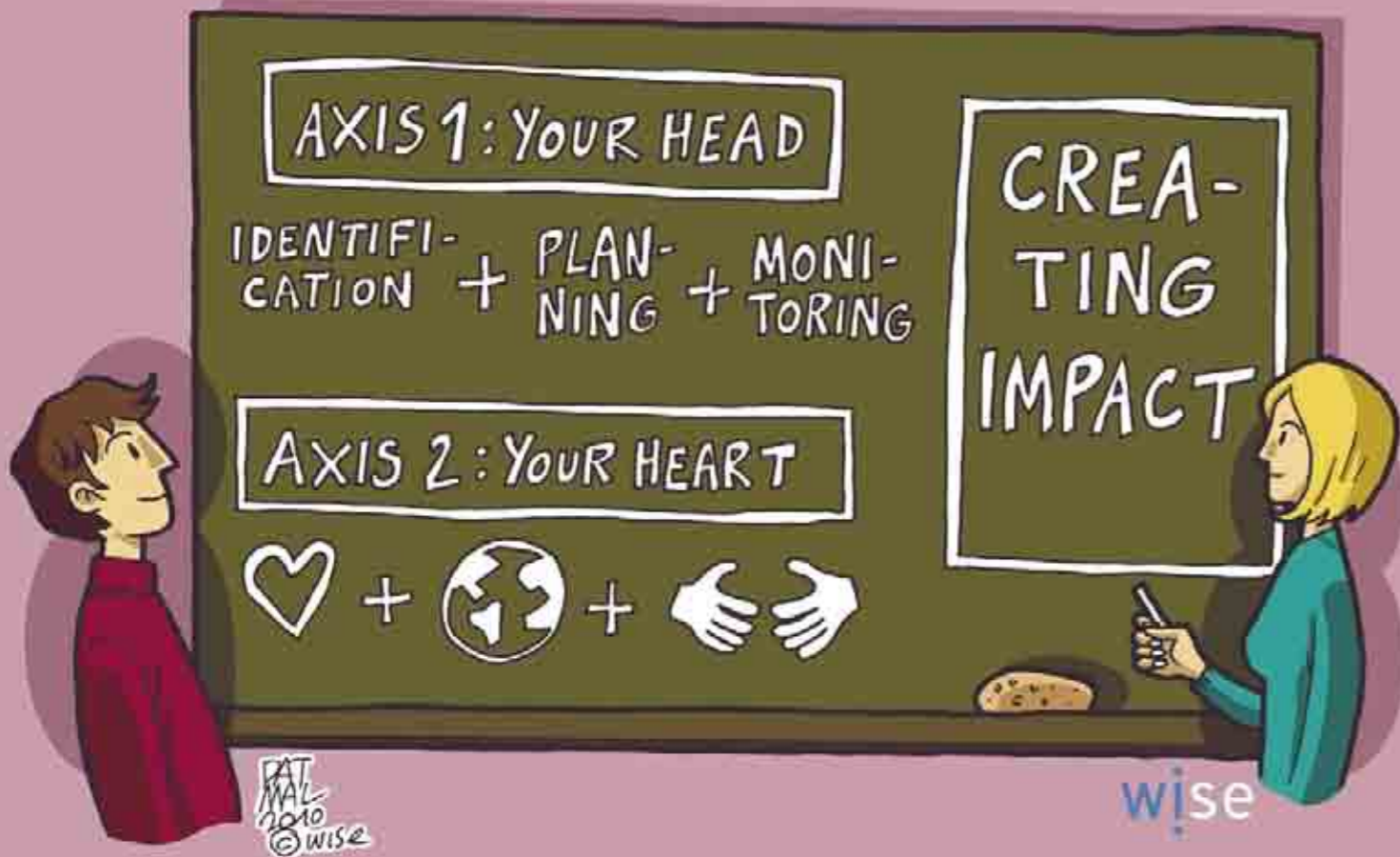
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## *Good ideas, new ideas*

**P**private events generally don't change anyone's perspective of what might be our appreciation of the world. However in some conferences we meet interesting people who give us a new perspective on what we are doing, or not yet doing, and with whom we would like to continue exchanging ideas.

During this year's Families in Philanthropy event, the sessions looked at the dilemma that donors face today when engaging in philanthropy: dilemmas with regards to family, strategy as well as impact. These tensions are continuously present in our daily choices and commitments.

This section highlights the key messages which emerged during the meeting and were the most important to the participants. We have expanded on these good ideas, sometime new ideas, with the aim to continue inspiring other philanthropists interested in these issues. Our objective is for the richness of our discussions to be expanded beyond our intimate and stimulating gathering in Annecy last October.



## Heart and Head

« Giving » is about making choices and taking a position on what you consider to be the right course of action. « Giving » is also about selecting trustworthy actors on issues close to your heart in order to optimise the impact of a donation and to be part of a rewarding and challenging experience. Such an engagement calls for a rigorous definition of your interests to ensure that the best suited partners and the most appropriate mechanisms are found.

Philanthropy should remain enjoyable: a taste for adventure, a desire to meet new people or a quest for meaning. However, this generosity must go hand in hand with a real impact for which it is important to find the balance between a predefined framework and spontaneity.

*What elements are important for finding this balance? Can we act only on our impulses (« coups de cœur ») or should we choose our partners only on the basis of a predetermined strategy and criteria? Should we have a procedure to choose partner organizations and tools to measure the results? Or is the guarantee of the person in the field responsible for the project enough?*

Over the past two decades, the expectations of donors and

the growing number of organizations on the ground have changed the sector of philanthropy in terms of its conception as well as in its practice.

- **Defining a framework and the available resources:** Before starting an engagement, reflecting on the mission and the structure as well as the precise objectives and principles of action is paramount. These rules will help guide your choices within the family and will serve as a strong support during your engagement as well as for the analysis of the impact.

- **Leaving room for « coups de cœur » :** At the same time your engagement must remain accessible to all, made of coups de cœur and intuition. These impulses are often the driving force behind an engagement. Giving to what you believe to be the « right thing » is just as important as giving the « right way ».

Thereby, a balance can be struck between the framework required to find the best suited partners and the emotional encounters that shape your engagement. Structuring one's philanthropy is a process that involves an encounter between the heart and the mind. The first step of this journey, which is made up of several stages, is the most important.