

The power of collective philanthropy

Partner and journey with fellow philanthropists
to model, replicate and scale philanthropic solutions.



Table of contents

Why collective philanthropy 4

How collective philanthropy achieves real impact 7

What you can do collectively 9



Why collective philanthropy

Collective thinking brings better contribution, outcomes, and impact, enabling philanthropy to strategically address complex issues

We believe in philanthropy working together as a driver of change, and are committed to harnessing the power of collective partnerships with philanthropists, organizations and governments.

We're not content with giving that hopes for change – good intentions aren't enough in today's fast-changing global landscape. That's why we're constantly looking for ways to achieve better social and environmental outcomes – by giving strategically.

Similarly, we're not satisfied with the resources available to drive change – we seek to mobilize more private capital and support its effective and efficient implementation, to address some of the most critical challenges of our time.

Connecting individuals together around strategic aspiration, practice and collective impact, is the future of philanthropic funding. Your philanthropy can be effective on its own, but by pooling funds and expertise with fellow philanthropists and delivering aligned outcomes, you reinforce each other's efforts, and achieve exponentially more impact.

Eradication of polio

The fight against polio is an amazing example of what we can achieve by working together. A disease that caused paralysis and death for much of human history is almost eradicated today – cases have decreased by over 99 percent since 1988.¹

That means there are more than 18 million people walking the Earth today who would've otherwise been paralyzed by polio.² This was only made possible by the shared commitment of donors – including governments, the private sector, multilateral institutions, and non-profit organizations.

[1] World Health Organization (2020). Does polio still exist? Is it curable? Available at: <https://www.who.int/news-room/q-a-detail/does-polio-still-exist-is-it-curable>. Last consulted: September 28, 2020.

[2] Bill Gates (2019). An update from the fight to eradicate polio: Organizations like Rotary International have pushed polio to the brink of eradication. Available at: <https://www.gatesnotes.com/health/an-update-from-the-fight-to-eradicate-polio>. Last consulted: September 28, 2020.

Become a collective member and gain a wealth of experience and benefits

Getting leverage for your donation is just one of the benefits of giving collectively. At UBS, we cover the costs of running the collectives, match your funding by 10 percent and we take you through a deep learning experience over three years.

Engaging in one of our collectives, allows you to:

- co-fund a portfolio of best-in-class non-profit organizations and social enterprises, working to achieve systemic change in an issue you care about;
- engage in a three year strategic philanthropy education experience with peer philanthropists and social investors, following the program design, implementation and evaluation process;
- work alongside other philanthropists and enlarge your network;
- learn tools and skills from expert practitioners, to practice your philanthropy with greater confidence and impact;
- access high level program reporting, analysis and due diligence, following outcomes in real time;
- visit the program to put the theory you learn into practice;
- attend annual conferences, virtual seminars and regional gatherings alongside your collective peers;
- implement your philanthropy strategically, and develop philanthropic leadership skills; and
- give in a deep and meaningful way, across borders, while driving extraordinary results and honing your skills and confidence as a philanthropic leader.

“After 16 years of working in philanthropy, I can honestly say that there is nothing more inspiring and fulfilling than seeing your philanthropy drive impact that has the potential to solve problems at scale. **But this can only happen when we work together.** Which is why we are delighted to offer our clients the unique opportunity to join our collectives, to work alongside peers and expert practitioners, to achieve systemic change in some of the most complex issues of our time.”

Tom Hall, Global Head UBS Philanthropy Services



How collective philanthropy achieves real impact

Along with fellow philanthropists, best-in-class non-profit organizations, social enterprises, and experts, you'll drive collective impact by developing sustainable philanthropic solutions that ignite social and environmental change.

At UBS, we believe that by harnessing the relationships we have with governments, non-profits, academic institutions, and our clients around the world, we can enable you to have more impact in your philanthropy. Philanthropy isn't just about giving money. It's about allocating philanthropic capital strategically, modelling, replicating, and scaling best practice, bringing leverage and leadership to the issues you care about. This has a real multiplier effect. We're stronger when we work together.

1. Collaborative partnerships

UBS Collectives will connect you with like-minded philanthropic peers who seek to fund effective, but underfunded approaches, capable of achieving systemic change in some of the most important social and environmental issues of our time. Giving you the opportunity to learn strategic approaches, engage in discussions with experts and peers, and follow a transformational change process in real time, in partnership with world-class practitioners.

2. Collective impact strategies

Built on over two decades of experience, we can partner with you to manage your collective giving strategies in the most efficient way while ensuring it is doing the most good – by sourcing more collective funding and supporting multiple groups working on different angles of the problem.

3. Building philanthropic leadership

As a member of our UBS Collectives, you'll join a three year philanthropy strategy and leadership program, develop expertise in strategic, high-impact philanthropic solutions working towards systems change across a range of issues. The programs will ultimately increase your impact; strengthen your understanding of strategic philanthropy and systems change, and allow you to build your knowledge, confidence, network and philanthropic leadership skills.



What you can do collectively

Join philanthropists in a “collective impact” approach – we have three ready-made collective portfolios for you to co-invest in.

1. The Transform Collective



The evidence is clear. The best place for children to grow up is in a family. Rather than maintaining a broken system, the Transform Collective drives efforts towards systemic change. Change that keeps children in families. Along with fellow philanthropists, best-in-class non-profit organizations and experts, you’ll drive collective impact by supporting family based care as an alternative to institutional care. And reform policies and practices to protect vulnerable children and strengthen families.

2. The Climate Collective



We’re the first generation to experience the impact of climate change, and the last to do something about it. This is your opportunity. The Climate Collective supports communities in South East Asia and beyond in developing climate mitigation and adaptation strategies, contributing to emissions reductions and improving biodiversity. Along with fellow philanthropists, best-in-class non-profit organizations and experts, you’ll drive collective impact by developing sustainable climate resilient livelihoods for communities and smallholders.

3. The Accelerate Collective



Social finance, an emerging approach in the development sector, offers innovative ways of attracting private capital and incentivizing contributions without distorting functioning markets. The Accelerate Collective harnesses the tools of social finance to deliver greater health and education outcomes for vulnerable communities. Along with fellow philanthropists, best-in-class non-profit organizations and experts, you’ll drive collective impact by using innovative financing models to unlock new and much needed sources of funding to improve health and education outcomes for disadvantaged children.

UBS and philanthropy

UBS Philanthropy Services is a unique award-winning offering that partners with clients to maximize their impact locally, nationally and globally. We provide comprehensive advice, insight experiences and execution services, and employ an investment-based approach to deliver solutions to pressing social and environmental issues. We are pioneers and innovators in the sector of social finance.

This document is issued by UBS Wealth Management, a division of UBS AG which is authorised and regulated by the Financial Market Supervisory Authority in Switzerland. In the United Kingdom, UBS AG is authorised by the Prudential Regulation Authority and is subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request. Where products or services are provided from outside the UK, they will not be covered by the UK regulatory regime or the Financial Services Compensation Scheme. Tax information is provided based upon our understanding of current tax legislation and applicable rates. These may change in the future and they may not apply to your individual circumstances. UBS does not give tax advice and you should consult your independent tax adviser for specific advice before entering into or refraining from entering into any investment. This document may not be reproduced or copies circulated without prior authority of UBS. This document is not intended for distribution into the US and/or to US persons or in jurisdictions where its distribution by us would be restricted.

© UBS 2020. The key symbol and UBS are registered and/or unregistered trademarks of UBS. All rights reserved.

UBS Philanthropy Services
Management
Europaallee 21
Postfach, CH-8098 Zurich
+41-44-237 27 87

sh-philanthropy@ubs.com

ubs.com/philanthropy

