

CASE STUDY

Professionalizing foundations

Michele Fugiel Gartner

My research at the Centre for the Study of Philanthropy & Public Good, St Andrews University, focuses on foundation staff, reflecting on their roles as professionals within foundations and exploring relationships inherent in the development of a foundation.



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Professionalization is an important lens for how we view foundations. On one hand, both in academic and practitioner literature, it is taken as a sign of maturity in operations and of expert decision-making, the basis for a strategic approach to philanthropy. However, professionalization has also been criticized for removing the

donor's original intentions, for bureaucratizing grantmaking, for hiring staff for its own sake, and even, for not choosing a higher rate of endowment payout.

For me, understanding the role of professionalization is two-fold. First, it's a prime component of what might be termed our philanthropic export package. In our dominant philanthropic framework, we suggest that professionalization is important and creates greater impact. These claims are not well researched. As we export this system to other cultures, we should make sure our claims are sound or at least better understood. Second, foundation professionalization has primarily been a matter of counting numbers, in particular the growing number of foundation

staff. Examining the views of foundation staff themselves would give a clearer, more rounded perspective on the issue. As a foundation practitioner, I know that self-analysis is a low priority, but I believe it is worth making time for. I believe that it affects how the foundation does its work and defines its success.

Understanding the professional roles of foundation staff and how they help build foundations is one way of learning more about our larger philanthropic system. I hope my work contributes to expanding our knowledge of the expression and approaches to professionalization and to building more spaces for practitioner reflection.

CASE STUDY

Short courses for foundation professionals

Ariane Waldvogel

The world of philanthropy is growing. In Switzerland alone, there are now over 13,000 registered foundations. These foundations, large and small, corporate and individual, and located across the country, cover a broad spectrum of themes, such as international development and humanitarian cooperation, culture and education, art, environment, social affairs and architecture.



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In parallel (or as a consequence?), foundations have become increasingly professional and important – not to say major – actors of change in our societies. I had been working in development cooperation for 22 years prior to joining the Pro Victimis Foundation in 2016, coming from a public, rather than private,

sector perspective which then required a shift of mindset and a different management style. That was why I took part in a three-day intensive course on foundation management, jointly organised by WISE, a Geneva-based group of philanthropy advisers, and the CEPS (Center for Philanthropy Studies, University of Basel).

The course, presented by both academics and practitioners, covered issues like the pros and cons of different foundation management structures, the supervisory authorities and taxation, developing a strategy and measuring impact, aligning asset management with the foundation's mandate, and managing its visibility and reputation. Of course, in three days it was impossible to cover everything. But for people like me, who have recently taken up management responsibilities

at a foundation, it was a good opportunity to clarify certain aspects of that management, and to open up avenues for new ideas and reflection on the foundation world, both from within and *vis-à-vis* society at large.

While the course was a sound one, my knowledge of and thinking about the role and responsibilities of foundations also comes from the conferences and meetings I attend. I understand much better now the need for the study and teaching of philanthropy and why two new professorships in philanthropy have recently been created at IMD (Lausanne) and the University of Geneva. I humbly hope that the courses given there will be as inter-disciplinary as possible, bringing together business and economics, law, psychology, sociology, history and any other relevant fields of study.