What you need to know

Only a very small number of programs meet our tough standards. We find the gems that have the potential to be truly transformative, scalable and sustainable – so that our donors’ generosity goes as far as it possibly can.

**Background**

The UBS Optimus Foundation connects clients with inspiring entrepreneurs, new technologies and proven models that are making a measurable, long-term difference to the most serious and enduring social and environmental problems. The only client-facing Foundation linked to a global wealth manager, UBS Optimus Foundation has a 20-year track record and is recognized globally as a philanthropic thought-leader.

We take an evidence-based approach and focus on programs that have the potential to be transformative, scalable and sustainable. This gives clients the reassurance that they are funding innovative projects that have a stronger chance of achieving all-important systemic change. UBS also makes matching contributions to the Foundation, ensuring that clients’ donations will go even further.

**Who can apply?**

Any organization or institution is welcome to apply, if your program is involved in health and/or education, and protection of children. Or if your program tackles environmental and/or climate issues.

We strongly encourage applications that involve partnerships between organizations of different disciplines, and between non-governmental organizations and universities or other research institutions.

**How to apply?**

Please complete the first section of our application checklist before you develop a proposal to the UBS Optimus Foundation. Please only apply if your program fully meets the application checklist criteria.

We’ll review the application and if we consider it to have a good chance of funding, we’ll send you the full application form and put you in touch with the program director.

**Selection process**

Our philanthropy experts will assess your application according to the specific criteria noted below.

Funding decisions will be communicated by the responsible program director.

**Selection criteria**

We always choose for maximum impact. The questions we ask before supporting programs:

- Addressing needs: Does this opportunity address needs of vulnerable children? How is their voice heard? And/or how does the program provide opportunities to accelerate the transitions needed to reduce and then eliminate climate pollution. Is this opportunity feasible, scalable and replicable?
- Innovation: Is this opportunity unique and differentiated from existing initiatives? Can this program catalyze a significant change in thinking, bringing the field forward?
- Evidence: Is there sufficient data in the area to ensure positive impact and wider-scale adoption? Is there an ongoing assessment process in place?
- Capacity strengthening: Will this opportunity help to strengthen local capacity and/or build required infrastructure?
- Bridge the gap: Is this a high-need area that is receiving insufficient attention? Does this opportunity leverage or involve complementary resources?
- Sustainability: Will this opportunity contribute to improved policy and practice to ensure lasting benefits? Will there be lasting positive outcomes for vulnerable children or the future of our planet?

**What happens afterward?**

All funded projects must provide regular progress update reports as indicated in the specific contracts (minimum once every year, with the first report due one year after start of project funding).

Also, a closing report is requested from every project. Funding for most projects will naturally end at this point.

But, after assessing each project’s further potential within the Foundation’s global long-term funding strategy, a small number of the most promising programs may be invited to submit a more detailed program application for further support.

A program may be considered promising for longer term support by the UBS Optimus Foundation if:
- the program idea has high potential for success
- all reasonable milestones have been achieved
- the lead organization and its partners have sufficient competencies to execute the program
- local partners are included and motivated to continue
- the project is consistent with the long-term strategic vision of the UBS Optimus Foundation
The UBS Optimus Foundation is a grant-making foundation that offers UBS clients a platform to use their wealth to drive positive social and environmental change. The Foundation selects programs that improve children’s health, education and protection, ones that have the potential to be transformative, scalable and sustainable as well as programs tackling environmental and climate issues.

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