Apply now

UBS Optimus Foundation – grant application checklist

Please only apply if your program meets all of the following criteria.

**What we support**
We take an evidence-based approach and focus on programs that have the potential to be transformative, scalable and sustainable. This gives our clients the reassurance that they are funding innovative programs that have a stronger chance of achieving all-important systemic change.

Our key focus areas are:
- Health: frontline health, safe surgery and pediatric cancer
- Education: education in displacement, skills for social mobility and scale delivery innovation
- Protection: anti-child trafficking and slavery, and families not orphans
- Environment: conservation and climate change

Does your project fit with our key focus areas (if unsure please consult our strategy document)?

**What we do not support**
Can you verify that your program does not
- focus solely on service or product delivery, running costs, construction, maintenance of infrastructure or equipment except as needed for the program;
- focus solely on stand-alone scholarships, tuition, stipends, events, exhibitions, publications, films or photos except as needed to strengthen local capacities, change behaviors and/or disseminate evidence to influence policymakers and practitioners;
- support religious or political initiatives, or promote religious and/or political views?

**Impact**
Will your program produce quantifiable outputs and outcomes that are directly related to improving children’s health and/or educational achievement, and/or preventing violence against children? Or will it accelerate the transitions needed to reduce and then eliminate climate pollution?

**Evidence**
Does your team have the experience and capacity to measure outcomes in a rigorous fashion? For example, have you included a research institution, agency or consultant (in-house or external) among your project partners to ensure best practices in outcomes measurement?

**Local involvement**
Does your program involve community participation, and respectful and equitable partnerships with local experts (e.g., technically competent implementing organizations and local research institutions)?

**Capacity strengthening**
Wherever appropriate, will your program help to train local community members, implementers and researchers, and leave something of value behind for the community, when the project ends?

**Sustainability**
If you demonstrate that your intervention is effective, does it have the potential to continue beyond the terms of this grant (e.g., by attracting other donor support, local government funding, or through its own revenue stream)?

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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. This document is for informational and educational purposes only and has no regard to the specific objectives, financial situation or particular needs of any specific recipient. It is not intended as a promotion of any UBS services nor an offer or a solicitation of an offer to sell or buy any product or other specific service. UBS Optimus Foundation does not provide investment, legal or tax advice. It strongly recommends to all persons considering the information herein to obtain appropriate independent legal, tax and other professional advice.

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