

Forum Program

The UBS Philanthropy Forum

Exercising Philanthropic Leadership

Day One: Thursday, April 21, 2005

10:00-11:00 Reception Area	Welcome Breakfast and Registration
11:00-11:15 Auditorium	Welcome and Opening Remarks Welcome message from UBS Senior Management Marcel Rohner , Chairman and CEO, UBS Wealth Management & Business Banking
11:15-11:50 Auditorium	Joint Opening Keynote: Exercising Leadership through Philanthropy How can philanthropy be leveraged to address global challenges? <i>Keynote speakers:</i> David Carrington , Former CEO, Baring Foundation, UK David Green , Founder and Executive Director, Project Impact, USA
11:50-12:00 Auditorium	Exercising Leadership: Overview of Day One A clear sense of the constraints and opportunities in a given region is instrumental as philanthropists exercise leadership. Taking a strategic perspective on philanthropy, Day One offers participants the opportunity to work through the various regional philanthropic agendas. <i>Speaker:</i> Maximilian Martin , Director, UBS Philanthropy Services, Switzerland
12:00-13:30 Parka Haus	Lunch <i>Host:</i> Raoul Weil , Head of Wealth Management International, UBS Wealth Management & Business Banking
14:00-15:30	Parallel Workshops, Module 1: The Regional Agenda Financing about twelve per cent of civil society revenues worldwide, private philanthropists play an important role in shaping local responses to global issues. But the enabling environment for philanthropy differs significantly across geographies. So do global challenges. The seven parallel workshops provide participants with access to specialists and fellow philanthropists. They provide a platform to discuss emergent issues on the regional philanthropic agenda and how to address them.
Workshop 1 Room A	Sub-Saharan Africa: <i>Moderator:</i> Bineta Diop , Executive Director, Femmes Africa Solidarité, Senegal <i>Discussants:</i> Sylvester John , Africa Director, Students in Free Enterprise, USA Nancy Ncube , Area Academy Executive, CISCO Networking Academy, Sub-Saharan Africa, South Africa <i>Challenger:</i> Nick Moon , Co-Founder and Managing Director, ApproTEC, Kenya

Workshop 2
Room B

Asia

Moderator:

Prabhu Guptara, Executive Director, Wolfsberg – The Plattform for Executive and Business Development, Switzerland

Discussants:

David Green, Founder and Executive Director, Project Impact, USA

Uday Khemka, Managing Director, Sun Group of Companies, India

Wu Qing, Professor, Beijing Foreign Studies University; Director, Beijing Development Center for Rural Women, China

Challenger:

Bunker Roy, Director, Barefoot College, India

Workshop 3
Room E

Eastern Europe

Moderator:

Colum Murphy, Dean, Geneva School of Diplomacy, Switzerland

Discussants:

Olga Alexeeva, Development Director, CAF International Philanthropy Trustees (a subsidiary of Charities Aid Foundation), UK

Alexei Germanovich, Deputy CEO, Severstal Group Holding, Russia

Edi Rama, Mayor of Tirana, Albania; World Mayor 2004

Challenger:

David Bornstein, Author, "How to Change the World", USA

Workshop 4
Room C

Latin America and the Caribbean

Moderator:

Ximena Escobar, Economic Counselor, Center for Applied Studies in International Negotiations, Switzerland

Discussants:

Jamil Mahuad, Former President of Ecuador; Fellow, Center for Public Leadership, Harvard University, USA

Jorge Villalobos Grzybowicz, President and CEO, Mexican Center for Philanthropy (CEMEFI), Mexico

Challenger:

Lee Davis, Co-Founder and CEO, NESsT, USA

Workshop 5
Room D

United States and Canada

Moderator:

Daniel Schwartz, CEO, Dynamica, USA; President Education Committee, YPO New York Chapter, USA

Discussants:

Bill Drayton, Founder and President, Ashoka, USA

Scott Painter, Executive Director, We Are the Future Foundation, USA

Challenger:

Mark Kramer, Managing Director, Foundation Strategy Group, USA

Workshop 6
Forum

Western Europe

Moderator:

Nigel Harris, CEO, New Philanthropy Capital, UK

Discussants:

Helmy Abouleish, Managing Director, SEKEM, Egypt; Recipient, Outstanding Social Entrepreneur Award 2004

Konstanze Frischen, Director, Ashoka, Germany

Sevdalina Rukanova, Director, International Committee and Global Affairs, European Foundation Center, Belgium

Peter Heller, Founder and Executive Director, Canopus Foundation, Germany

Challenger:

Luc Tayart de Borms, CEO, King Baudouin Foundation, Belgium

Workshop 7
Plenum 1

Switzerland

Moderator:

Marc Pfitzer, Managing Director, Foundation Strategy Group, Switzerland

Discussants:

Christian Felber, Managing Director, Christoph Merian Stiftung, Switzerland; Member of the Board, SwissFoundations

Corinne Frey, Swiss Representative, Ashoka

Urs Zollinger, Partner and Co-Founder, King Zollinger & Co, Advisory Services, Switzerland

Challenger:

Christoph Schmocker, Executive Director, UBS Optimus Foundation, Switzerland

15:30-16:00
Remise

Tea & Coffee Break

16:00-17:30
Auditorium

Plenary Session: The Promise of Strategic Philanthropy

Given the magnitude of challenges, it is critical to deploy resources in an effective fashion. The panel will explore how a strategic approach to philanthropy can help address the issues raised in the previous workshops.

Moderator:

Felicitas von Peter, Project Manager, Bertelsmann Foundation, Germany

Discussants:

José Carreras, Founder and President, José Carreras International Leukemia Foundation, Spain

David Carrington, Former CEO, Baring Foundation, UK

Mark Kramer, Managing Director, Foundation Strategy Group, USA

Wu Qing, Professor, Beijing Foreign Studies University; Director, Beijing Development Center for Rural Women, China

17:30-19:00

Break

19:00-19:45

Foyer

Aperitif

Speaker:

Anthony K. Shriver, Founder and Chairman, Best Buddies International, USA

19:45-20:30

Foyer

Concert

Host:

Mark Branson, Chief Communication Officer, UBS
With the UBS Verbier Festival Orchestra

20:30-23:00

Parka Haus

Welcome Dinner

Host:

Mark Branson, Chief Communication Officer, UBS

23:00

Remise

Open Bar

Day Two: Friday, April 22, 2005

8:00-9:00

Parka Haus

Breakfast

9:00-10:00

Auditorium

Joint Keynote Day Two: Strategies for Social Change

How do philanthropists pioneer social innovation?

Keynote speakers:

Bineta Diop, Executive Director, Femmes Africa Solidarité, Senegal

Bill Drayton, Founder and President, Ashoka, USA

10:00-10:15

Auditorium

Leveraging Expert Knowledge: Overview of Day Two

Philanthropists who seek to address real needs depend on field intelligence and high-leverage interventions. Day Two offers participants the opportunity to work through two essential ingredients of high impact philanthropy:

- How to identify and tackle the burning issues on the global agenda?
- What are the models and mechanics of effective engagement?

Speaker:

Maximilian Martin, Director, UBS Philanthropy Services, Switzerland

10:15-11:30

Parallel Workshops, Module 2: Global Issues

The Asian tsunami crisis has underlined the interconnectedness of the world we live in. The workshops look into a number of pressing global challenges, providing a platform for participants to meet fellow philanthropists and specialists to discuss core issues on the global agenda, and how to address them through philanthropy.

Workshop 8

Room A

Disasters: Managing the Response Challenge

Moderator:

Randall Zindler, CEO, Medair, Switzerland

Discussants:

Felix Bollmann, Managing Director, Swiss Solidarity, Switzerland

Peter Brey, Secretary General, Terre des Hommes, Switzerland

Challenger:

Gervais Appave, Director of Migration Policy and Research, International Organization for Migration, Switzerland

Workshop 9

Room B

Education: Leveraging Knowledge for Empowerment

Moderator:

Christoph Schmocker, Executive Director, UBS Optimus Foundation, Switzerland

Discussants:

Burkhard Gnärig, CEO, International Save the Children Alliance, UK

Bruce Nasby, Executive Vice President, Students in Free Enterprise, USA

Challenger:

Jamil Mahuad, Former President of Ecuador; Fellow, Center for Public Leadership, Harvard University, USA

Workshop 10
Room C

Philanthropy and the Environment

Moderator:

Mahenau Agha, Partnership Adviser, United Nations Development Programme
Global Environment Facility, United Nations

Discussants:

Jean-Paul Paddack, Country Officer, World Wildlife Fund, Madagascar

Christina Ulardic, IGP Associate, Networks & Research, Swiss Re Centre for Global
Dialogue, Switzerland

Thomas Vellacott, Member of the Managing Board, World Wildlife Fund,
Switzerland

Challenger:

Peter Heller, Founder and Executive Director, Canopus Foundation, Germany

Workshop 11
Room D

Health: Making Drugs and Services Available

Moderator:

Susanna Hausmann-Muela, Program Manager, Medical and Biological Research,
UBS Optimus Foundation, Switzerland

Discussants:

Victoria Hale, Founder and CEO, Institute for OneWorld Health, USA

Hermann Sailer, Founder and CEO, Cleft Children Foundation, Germany

Challenger:

Antoni García Prat, General Manager, José Carreras International Leukemia
Foundation, Spain

Workshop 12
Room E

Building Security through Citizen Action

Moderator:

Colum Murphy, Dean, Geneva School of Diplomacy, Switzerland

Discussants:

Bineta Diop, Executive Director, Femme Africa Solidarité, Senegal

Uday Khemka, Managing Director, Sun Group of Companies, India

Jakob von Uexkull, Founder, Right Livelihood Awards, Sweden

Challenger:

Ewa Konczal, Director, Ashoka, Poland

Workshop 13
Room F

Making Technology Work for Social Change

Moderator:

Nick Moon, Co-Founder and Managing Director, ApproTEC, Kenya

Discussants:

Julian Laird, Development Director, Global Crop Diversity Trust, Italy

Rory Stear, CEO, Freeplay Energy Group, UK

Challenger:

David Green, Founder and Executive Director, Project Impact, USA

Workshop 14
Forum

Arts and Culture

Moderator:

Mark Branson, Chief Communication Officer, UBS

Discussants:

Martin Engström, Artistic Director, UBS Verbier Festival Orchestra, Switzerland

Edi Rama, Mayor of Tirana, Albania; World Mayor 2004

Challenger:

David Carrington, Former CEO, Baring Foundation, UK

Workshop 15
Plenum 1

Microfinance: What's Next?

Moderator:

Ernst Brugger, Founder and President, BHP Consulting, Switzerland

Discussants:

Christina Barrineau, Chief Technical Advisor, UN Year of Microcredit 2005, United Nations Development Programme

Jean-Philippe de Schrevel, Co-Founder, BlueOrchard, Switzerland

Klaus Tischhauser, Managing Director, responsAbility Social Investment Services, Switzerland

Challenger:

Fernand Vincent, Founder and Board Member, International Guarantee Fund, Switzerland

11:30-12:30
Remise

Structured Meeting Break

By the time one has identified the individuals one absolutely wants to sit down with for 15 minutes, events are often over. This "structured meeting break" will allow participants to remedy the situation by signing up for one of four meeting slots on a meeting card every participant receives at the Forum.

12:30-14:00
Parka Haus

Lunch

Hosts:

Marcel Hegner, Local Market Head Latin America, UBS Wealth Management

Martin Liechti, Head of the Americas, UBS Wealth Management & Business Banking

14:00-15:30

Parallel Workshops, Module 3: Getting Models and Mechanics Right

Achieving high impact through a philanthropic engagement requires identifying an issue one is passionate about, developing an actionable program, and implementing it with the right partners. Getting the mechanics right can be a challenge in itself. Eight parallel workshops enable participants to engage fellow philanthropists and specialists, taking a systematic look at issues that become relevant at the different stages of the philanthropy lifecycle.

Workshop 16
Room A

From Philanthropic Aspiration to Action Plan

Moderator:

Maximilian Martin, Director, UBS Philanthropy Services, Switzerland

Discussants:

Mark Kramer, Managing Director, Foundation Strategy Group, USA

Cornelius Pietzner, Treasurer and Member of the Board, Goetheanum, Switzerland

Challenger:

Felicitas von Peter, Project Manager, Bertelsmann Foundation, Germany

Workshop 17
Forum

Selecting the Appropriate Philanthropic Vehicle

Moderator:

Graydon Bellingan, Director, UBS Financial Planning, Switzerland

Discussants:

Graham Davies, CEO, CAF International Philanthropy Trustees (a subsidiary of Charities Aid Foundation), UK

Christoph Erni, Director, UBS Financial Planning, Switzerland

Jean-Paul Paddack, Country Officer, World Wildlife Fund, Madagascar

Linda Zurkinden, Co-Founder StiftungsZentrum, Switzerland

Challenger:

Marcello Palazzi, Founder and President, Progressio Foundation, Netherlands

Workshop 18
Room B

Channeling Philanthropy through Your Company

Moderator:

Marc Pfitzer, Managing Director, Foundation Strategy Group, Switzerland

Discussants:

Scott Painter, Executive Director, We Are the Future Foundation, USA

Thomas Vellacott, Member of the Managing Board, World Wildlife Fund, Switzerland

Challenger:

Daniel Schwartz, CEO, Dynamica, USA; President Education Committee, YPO New York Chapter, USA

Workshop 19
Room C

Asset Management Strategies for Your Social Purpose Vehicle

Moderator:

David Rowe, Executive Director, UBS, UK

Discussants:

Eric Ager, Chairman, Financial Advisory Committee, Fondation pour les Autres, Netherlands

Gérald Berger, Executive Director, UBS Investment Solutions, Switzerland

Br. Th.A.M. Blokland, Director of Caritas of the Diocese of Rotterdam, Netherlands

Challenger:

Klaus Tischhauser, Managing Director, responsAbility Social Investment Services, Switzerland

Workshop 20
Room D

Knowledge Management in Charitable Organizations

Moderator:

Nigel Harris, CEO, New Philanthropy Capital, UK

Discussants:

Timon Beyes, Senior Fellow, Center for Public Leadership, University of St. Gallen, Switzerland

David Bonbright, Founder and CEO, Keystone, UK

Andreas Mittrowann, Project Manager, Bertelsmann Foundation, Germany

Challenger:

Felix Bollmann, Managing Director, Swiss Solidarity, Switzerland

Workshop 21
Room E

Using Impact Measurement to Achieve Scale

Moderator:

Alex Nicholls, Lecturer, Skoll Center for Social Entrepreneurship, Saïd Business School, Oxford University, UK

Discussants:

Maurice Machenbaum, Co-Founder, Wise Partnership, Switzerland

Bunker Roy, Director, Barefoot College, India

Challenger:

Olivier Kayser, Vice-President Europe, Ashoka, USA

Workshop 22
Room F

Strategic Partnerships

Moderator:

Jamil Mahuad, Former President of Ecuador; Fellow, Center for Public Leadership, Harvard University, USA

Discussants:

Stephen Ainger, CEO, Charities Aid Foundation, UK

Peter Heller, Founder and Executive Director, Canopus Foundation, Germany

Jack Lowe, CEO, BlueOrchard, Switzerland

Challenger:

Florian Lennert, Director, Corporate Relations, London School of Economics, UK

Workshop 23
Plenum 1

The Promise of Social Entrepreneurship

Moderator:

Lee Davis, Co-Founder and CEO, NESsT, USA

Discussants:

David Bornstein, Author, "How to Change the World", USA

Bill Drayton, Founder and President, Ashoka, USA

David Green, Founder and Executive Director, Project Impact, USA

Challenger:

Paola Grenier, Dahrendorf Scholar, London School of Economics, UK

15:30-16:00
Remise

Tea & Coffee Break

16:00-17:00
Auditorium

Plenary Session: Leadership and Philanthropy - Lessons Learned

By deploying a variety of intervention models, philanthropists routinely play a major role in pioneering social innovation. The closing panel will leverage participants' personal experiences to reflect on the Forum's main thematic threads - the regional agenda, global issues, and giving mechanics.

What are the key lessons learned? What are the challenges ahead?

Moderator:

Ernst Brugger, Founder and President, BHP Consulting, Switzerland

Discussants:

David Bornstein, Author, "How to Change the World", USA

Bineta Diop, Executive Director, Femmes Africa Solidarité, Senegal

Uday Khemka, Managing Director, Sun Group of Companies, India

Daniel Schwartz, CEO, Dynamica, USA; President Education Committee, YPO New York Chapter, USA

Luc Tayart de Borms, CEO, King Baudouin Foundation, Belgium

17:00-17:15
Auditorium

Concluding Remarks

Speaker:

Maximilian Martin, Director, UBS Philanthropy Services, Switzerland

17:15-17:45
Auditorium

Closing Keynote: The Leadership Challenge

Keynote speaker:

Scott Painter, Executive Director, We Are the Future Foundation, USA

17:45-18:00
Auditorium

Farewell Greeting

Speaker:

Alain Robert, Head of Wealth Management Switzerland,
UBS Wealth Management & Business Banking

End of Formal Program Sessions

19:00-21:00
Parka Haus

Buffet Dinner at Château de Wolfsberg

Host:

Senior Management, UBS Wealth Management & Business Banking

or

18:30-23:00

Optional Cultural evening in Zurich (reservation required)

Guided tour of Zurich and dinner in town

Host:

Juerg Haller, Head Products & Services,
UBS Wealth Management & Business Banking

Day Three: Saturday, April 23, 2005

7:30-9:00
Parka Haus

Breakfast

9:00-9:15
Forum

Working through Your Philanthropy: Overview of Day Three (Optional Private Sessions and Working Group)

The UBS Philanthropy Forum is designed as an interactive, outcome-oriented knowledge exchange platform that puts the skills and knowledge of specialists at the disposal of philanthropists. The formal Forum sessions on the first two days will have explored what the issues are, how they manifest themselves in different world regions, and how to give effectively.

On Day Three, we will engage in working on both individual solutions and contributing to the field at large:

- The UBS Philanthropy Services team offers the option to work through individual participants' philanthropic projects in a customized workshop session, drawing on a select group of specialists. A total of nine one-hour slots will be available. Participants are invited to sign-up on a first-come first-served basis on Day One of the Forum.
- All discussions at the event are off the record and confidential. But some insights can be generalized. We are therefore planning to publish a report on the global philanthropy agenda in collaboration with the Center for Civil Society at the London School of Economics. If you want to contribute to shape the conference report, please join the working group on Saturday morning.

Speaker:

Maximilian Martin, Director, UBS Philanthropy Services, Switzerland

9:15-12:00
Forum

Working Group: Philanthropy – Where Are We Headed?

Facilitators:

David Carrington, Former CEO, Baring Foundation, UK

Paola Grenier, Dahrendorf Scholar, London School of Economics, UK
(interrupted by tea and coffee break from 10:15-10:30)

9:15-12:00
Upon request

Private Advisory Sessions

Specialists:

UBS Philanthropy Services in collaboration with ad-hoc specialists

9:15-10:15
Upon request

My Philanthropy Workshop: Sessions I, II, III

Specialists:

UBS Philanthropy Services
in collaboration with ad-hoc specialists

10:15-10:30
Remise

Tea & Coffee Break

10:30-11:30
Upon request

My Philanthropy Workshop: Sessions IV, V, VI
Specialists:
UBS Philanthropy Services
in collaboration with ad-hoc specialists

11:30-12:30
Upon request

My Philanthropy Workshop: Sessions VII, VIII, IX
Specialists:
UBS Philanthropy Services
in collaboration with ad-hoc specialists

12:30-14:00
Parka Haus

Farewell Lunch

14:00

End of Event