

# Roundtable Program

## The UBS Philanthropy Roundtable

### Creating Impact

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<b>10:00-10:30</b>	<b>Breakfast and Registration</b>
<b>10:30-10:40</b>	<b>Welcome and Opening Remarks</b> Welcome message  <i>Speaker:</i> <b>Juerg Haller</b> , Head of Products & Services, UBS Global Wealth Management & Business Banking
<b>10:40-10:50</b>	<b>Overview of the Day</b> Toward greater foundation impact: What do we want to achieve today?  <i>Speaker:</i> <b>Maximilian Martin</b> , Head, UBS Philanthropy Services
<b>10:50-11:30</b>	<b>Opening Keynote</b> Philanthropic vision, accomplishments and challenges  <i>Speaker:</i> <b>Paulo Coelho</b> , Author and Founder, The Paulo Coelho Institute, Brazil
<b>11:30-12:15</b>	<b>Three Case Studies</b>  <i>Moderator:</i> <b>Maximilian Martin</b> , Head, UBS Philanthropy Services  <i>Resource Persons:</i> <b>Rodrigo Baggio</b> , Founder, Committee for Democracy in Information Technology, Brazil <b>Charles Best</b> , Founder and President, DonorsChoose, USA <b>Paulo Coelho</b> , Author and Founder, The Paulo Coelho Institute, Brazil
<b>12:15-12.45</b>	<b>Apéro</b>
<b>12:45-13:15</b>	<b>Visit of the Museum of the Château de Coppet (optional)</b>
<b>13:15-14:30</b>	<b>Lunch Remarks &amp; Lunch</b>  <i>Speaker:</i> <b>Martin Liechti</b> , Head of the Americas, UBS Global Wealth Management & Business Banking

**14:30-16:00**

**Parallel Workshops**

The workshops will enable participants to work through the core challenges a philanthropist faces when looking for impact

**Workshop 1**

**Developing an Effective Model and Sustainable Funding**

Case study on Solar Meninos de Luz

*Moderator:*

**Maximilian Martin**, Head, UBS Philanthropy Services

*Resource Persons:*

**Maria Chertok**, Director, Charities Aid Foundation, Russia

**Paulo Coelho**, Author and Founder, The Paulo Coelho Institute, Brazil

*Challenger:*

**Lee Davis**, Co-Founder and CEO, Non Profit Enterprise and Self-sustainability Team, USA

**Workshop 2**

**Creating Additional Leverage: Scaling Up**

Case study on the Committee for Democracy in Information Technology

*Moderator:*

**Daniel Schwartz**, Managing Director, Dynamica, USA; President Education Committee, YPO New York Chapter, USA

*Resource Persons:*

**Rodrigo Baggio**, Founder, Center for Democracy in Information Technology, Brazil

**Boia Efraime Junior**, Program Manager, Children & Talents, UBS Optimus Foundation, Switzerland

*Challenger:*

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

**Workshop 3**

**Building Social Innovation: The Impact Challenge**

Case study on the Edna McConnell Clark Foundation

*Moderator:*

**Rien van Gendt**, Executive Director, Van Leer Group Foundation, Netherlands

*Resource Persons:*

**Charles Best**, Founder and President, DonorsChoose, USA

**Hans-Peter Fricker**, CEO, WWF Switzerland

*Challenger:*

**Michael Chu**, Senior Lecturer, Harvard Business School, USA

**16:00-16:30**

**Tea and Coffee Break**

**16:30-17:30**

**Plenary Session: Integrating Recommendations**

The workshop challengers will present the suggestions brainstormed by workshop participants, followed by a Q&A session

*Rapporteurs:*

**Michael Chu**, Senior Lecturer, Harvard Business School, USA

**Lee Davis**, Co-Founder and CEO, Non Profit Enterprise and Self-sustainability Team, USA

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

**17:30-18:15**

**Concluding Remarks and Closing Keynote**

*Speaker:*

**Paulo Coelho**, Author and Founder, The Paulo Coelho Institute, Brazil

**Maximilian Martin**, Head, UBS Philanthropy Services

**18:15-18:30**

**Farewell Greeting**

*Speaker:*

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

**18:30-20:30**

**Dinner & Keynote Address:**

*Speaker:*

**Patrick Bittel**, Member of the Board, Little Dreams Foundation, Switzerland