



Forum Program

The Global UBS Philanthropy Forum  
Building Change Communities

## How This Program Works

The structure of the Forum is designed to give you maximum flexibility to enrich your across-the-board thinking, to emphasize concrete problem-solving and relationship-building as well as to facilitate your access to cutting-edge knowledge on philanthropy.

### **Keynotes and Plenary Sessions**

Both days will open with keynotes which together with plenary sessions will be delivered by civil society and philanthropy leaders, providing an opportunity to jointly reflect on leading practice in the field.

### **Workshops Tracks**

In 15 workshops, the Forum offers the opportunity to work through concrete challenges and jointly devise strategy recommendations.

- Workshop track A will look at smart solutions to pressing global challenges.
- Workshop track B will discuss how to get family philanthropy and governance right.
- Workshop track C will look at the emerging social investment industry: how can we do good and well at the same time?
- Finally, workshop track D will look into one of our key challenges for the 22nd century – how to get ocean use and conservation right.

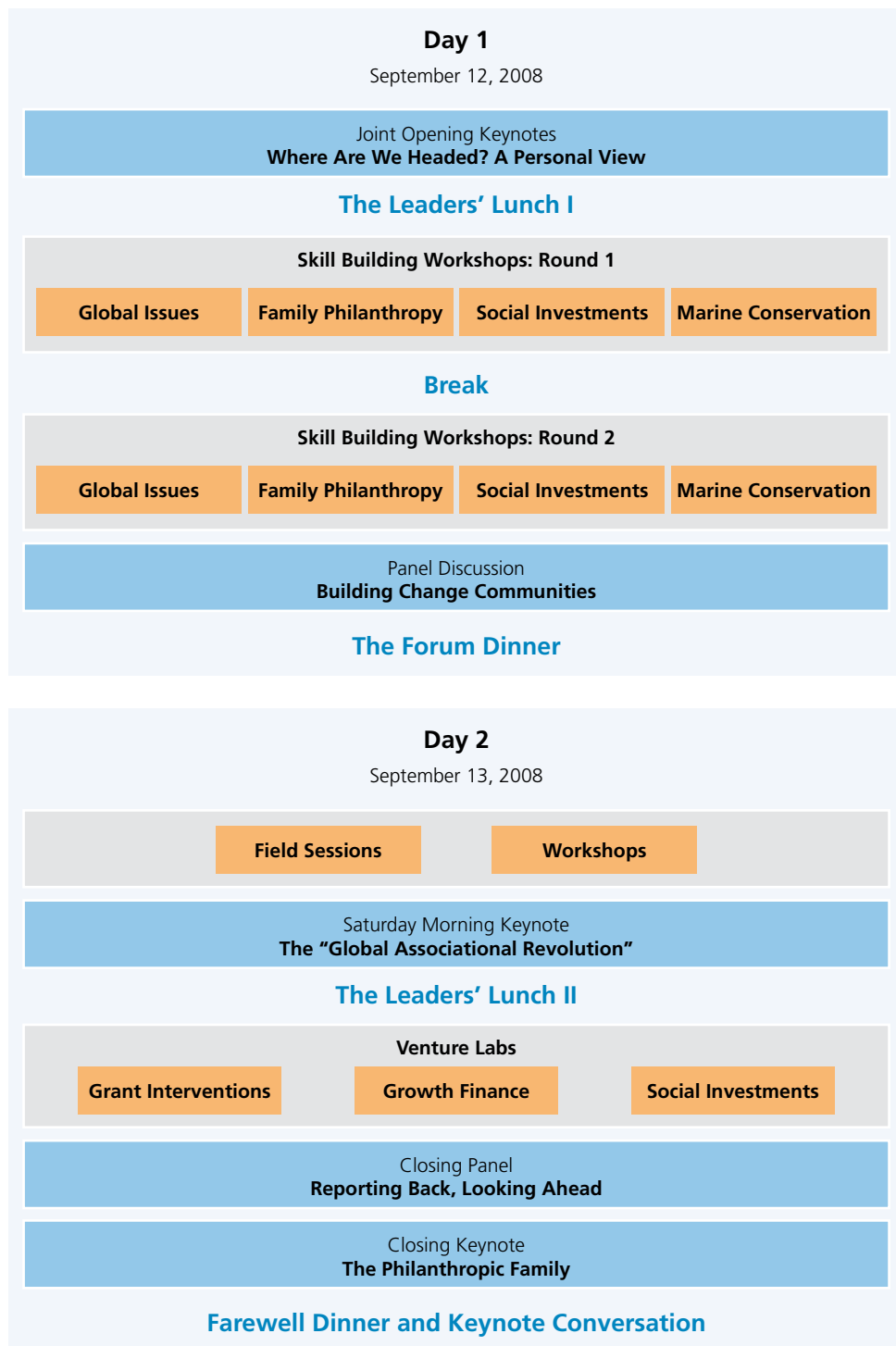
### **Field Sessions and Venture Labs**

On Day 2, the Forum will host field sessions to social or scientific organizations in Singapore, as well as “venture lab” sessions which showcase social intervention opportunities, to be assessed by experts on stage. Venture Lab V-1 will highlight grant-making opportunities. Venture Labs V-2 and V-3 will focus on a range of growth-finance and for-profit social investments.

### **Private Advisory Sessions**

On Sunday, September 14, we offer you the ability to seek private advisory sessions to discuss customized solutions relevant to your philanthropic aspirations. These sessions will be conducted in confidence with senior members of the UBS Philanthropy Services team.

# Program Structure in a Nutshell



Keynotes & Plenaries  
Parallel Sessions

## Day One: Friday, September 12, 2008

- 08:30-09:30** **Welcome Breakfast and Registration**  
*Grand Ballroom*
- 09:30-09:45** **Welcome and Opening Remarks**  
*Grand Ballroom*  
Welcome to the sixth UBS Philanthropy Forum  
*Speaker:*  
**Raoul Weil**, Member of the Group Executive Board, Chairman and CEO, Global Wealth Management & Business Banking, UBS
- 09:45-10:45** **Opening Keynote: Where Are We Headed?**  
The challenges facing humanity are daunting: heading off global warming and environmental destruction; stabilizing the world's population; ending extreme poverty; and breaking the political logjams that hinder global cooperation. But there is some good news. The progress of science makes more solutions available, faster and at lower cost than ever in human history. Is humankind at the threshold of a new epoch that will see the merging of human biology with the staggering achievements of genetics, nanotechnology and robotics? How will this new world look like, and what does this mean for individuals' ability to make a difference through philanthropy and social investment?  
*Speaker:*  
**Raymond Kurzweil**, Scientist and Author, USA
- 10:45-11:15** **Keynote II: How to Make It Work – A Personal View**  
Entrepreneurs and philanthropists play a key role in providing society's risk capital for social change – as well as conserving what is most precious to humanity. As philanthropists and citizens around the world partner to roll out solutions on the scale required, what are the lessons? How can philanthropists maximize their catalytic power? An entrepreneur and philanthropist shares key insights.  
*Speaker:*  
**Mo Ibrahim**, Founder, Mo Ibrahim Foundation, UK
- 11:15-11:30** **Overview of the Day**  
Endowed with the existential freedom to back new ideas, philanthropists are uniquely well positioned to make a difference in a world in need of environmental sustainability and greater social harmony. But in their work, they often realize that not everything can be accomplished alone. At the Forum, we will explore what it means to act as collaborative and strategic builders of social change. How can philanthropists build "change communities" – both to tap additional resources and to accelerate the rate of social innovation?  
*Speaker:*  
**Maximilian Martin**, Global Head, UBS Philanthropy Services
- 11:30-12:00** **Short Break and Workshop Sign-Up**
- 12:00-13:30** **The Leaders' Lunch I**  
*Grand Gallery*  
Inspired by the lunch keynote, table facilitators will lead informal discussions  
*Keynote Speaker:*  
**Martti Ahtisaari**, Chairman of the Governing Council, Interpeace, Switzerland

**13:30-14:45 Parallel Workshops, Round 1 – Modules A, B, C, D:**

**Module A: Global Issues, Smart Solutions**

Turning the tide on global issues such as education, health, climate change and the environment, or conflict resolution is a daunting task. Little progress can be expected without the collaboration of major stakeholders. Given finite resources, solutions will have to be “smart” – collaborative, highly resource-effective and scalable. Given their existential freedom to try out new approaches and stay the course, philanthropists play a critical enabling role. What are some new smart solutions to long-standing challenges, and how are philanthropists acting as catalysts of change?

**Module B: Family Philanthropy and Governance**

Without individual leadership, nothing consequential gets started. Without institutions, nothing lasts. To properly ground their long-term ambitions, philanthropists are increasingly focusing on the quality of organizations involved. What are some of the core structural design features that enable effective philanthropy? And how can one build family values and succession objectives into the foundation DNA?

**Module C: The Emerging Social Investment Landscape**

Philanthropy is moving beyond grantmaking. Inspired by the success of microfinance, leading philanthropists and foundations are experimenting with a host of innovative approaches to social problem solving. An intermediary landscape is shaping up, using sophisticated for-profit models with a strong social or environmental impact. What are the most promising examples and strategies in this emerging social investment industry? When should I make a grant and when should I invest in social change?

**Module D: Our Oceans – The 22nd Century Challenge**

Workshop track D will illustrate how to move forward on a specific issue that is critical for the future of humanity – and where collaborative strategies centering on change communities will be essential for success: balancing use and conservation of the world’s oceans. The track looks at a concrete example where groups of experts and wealthy individuals collaborate toward a common philanthropic objective and commit financial resources, personal networks, and know-how.

**Workshop A-1 Building a Change Community for Public Health**

*Millenia 5*

Healthcare systems worldwide and access to them are a key area where committed individuals can make a difference. Issues of cost, awareness, coverage, ageing populations and epidemics often require both immediate action and long-term thinking. Effective stakeholder coordination is essential. How can a philanthropist best create impact through leveraged interventions in areas such as research, product access, health education and advocacy? When does it make sense to collaborate with others, and how?

*Moderator:*

**Francis Pinto**, Co-Founder, Xandev Foundation, UK

*Discussants:*

**Craig Burgess**, Senior Programme Officer, GAVI Alliance, Switzerland

**Akio Kanai**, Chairman and CEO, Fuji Optical Co. Ltd., Japan

**Clive Palmer**, Founder and Chairman, Mineralogy, Australia

*Challenger:*

**Cherie Liem**, Executive Director, GITI Group, Indonesia

**Workshop B-1 Money with Meaning: My Philanthropy – A Second Career?**

*Chihuly 1*

At some point many entrepreneurs relinquish control or executive management of their corporate vehicles and become “second-career” philanthropists, committing substantive amounts of time, money and passion. But some of the rules of success in the citizen sector differ substantially from business. What are the key factors to achieve social impact and personal satisfaction?

*Moderator:*

**Stanley Tan**, Chairman, National Volunteer and Philanthropy Centre, Singapore

*Discussants:*

**Willie Cheng**, Chairman, Lien Centre for Social Innovation, Singapore

**Po Chung**, Chairman Emeritus, DHL Express, Hong Kong

**Adam Scott**, Founder, The Adam Scott Foundation, Australia

**Laurence Vandenborre**, Founder, The Art-Therapy Studio, Singapore

*Challenger:*

**Cornelius Pietzner**, Executive Council, General Anthroposophical Society, Switzerland

**Workshop B-2 Benchmarking Your Initiative**

*Soong Room*

The nonprofit sector faces rising expectations regarding the legitimacy, integrity and performance of non-governmental organizations. Methodologies providing stakeholders with greater transparency at reasonable cost are on the rise. More and more investors ask for an independent assessment, based on a comprehensive and valid set of perspectives. Can philanthropic action be properly benchmarked, and if so how?

*Moderator:*

**Christian Gruenler**, Director, SOS Children's Villages, Germany

*Discussants:*

**Béatrice de Durfort**, Executive Director, French Foundation Center, France

**Robert Jourdain**, Assistant Vice-President, SGS, Switzerland

*Challenger:*

**Christoph Schmocker**, Managing Director, UBS Optimus Foundation, Switzerland

**Workshop C-1 Setting Up a Venture Fund**

*Chihuly 2*

For any philanthropic project to succeed, it is key to combine a keen sense of strategic opportunity with professional processes. As more and more philanthropists think about setting up venture funds, what are the steps to keep in mind and how should one structure the process? Founders share their experiences.

*Moderator:*

**Andreas Ernst**, Deputy Global Head, UBS Philanthropy Services

*Discussants:*

**Søren Mouritsen**, Founding Partner, The International Entrepreneur Fund, Switzerland

**Tom Wang**, Co-Founder, FLOW, Taiwan

*Challenger:*

**Alain Vandenborre**, Director, Hamilton Lane; Founder, Singapore FreePort, Singapore

**Workshop C-2 Impact Investing: Where Do We Stand – An Update on L3C and Philanthropication**

*Garden Room*

A new generation of business-savvy, socially and environmentally conscious entrepreneurs is launching workable ventures across a variety of regions and sectors. New legal structures such as the low-profit, limited liability company (L3C) raise the absorptive capacity for such capital. But where will the capital for such ventures come from, especially in developing countries. The positive experience of generating philanthropic assets through privatization sales as in the case of the Italian banking foundations suggests that for many countries, "philanthropication thru privatization" could be a good way to produce a critical mass of philanthropic assets. A lot is happening - where are the high-leverage opportunities?

*Moderator:*

**Tim Nielander**, General Counsel, GAVI Fund and GAVI Foundation, USA and Switzerland

*Discussants:*

**Robert Lang**, CEO, L3C Advisors; CEO, Mary Elizabeth and Gordon B. Mannweiler Foundation, USA

**Lester Salamon**, Director, Center for Civil Society Studies, Johns Hopkins University, USA

*Challenger:*

**Arthur Wood**, Director, Social Financial Services, Ashoka, UK

- Workshop D-1** **Environment: Cooperation 3.0**  
*Millenia 6*  
*In collaboration with the National Geographic Society*
- The ocean covers two thirds of our planet and provides 99 per cent of its living space. However, human activities are degrading marine life and the services it provides at an accelerated rate. While a suite of solutions exists, the challenge is to implement them on a global scale. Barriers include strong national or commercial interests, lack of public awareness, low levels of coordination, and insufficient use of market mechanisms. How can philanthropists address these barriers through change communities? What is needed to build “strategic ecosystems” or “war rooms” to achieve conservation goals?
- Moderator:*  
**Terry Garcia**, Executive Vice-President, Mission Programs, National Geographic Society, USA
- Discussants:*  
**Joshua Reichert**, Managing Director, Pew Charitable Trusts, USA  
**Enric Sala**, National Geographic Fellow, Spain
- Challenger:*  
**Marcello Palazzi**, Member of the Board, Tällberg Foundation; President, Progressio Foundation, Netherlands
- 14:45-15:15** **Tea and Coffee Break**
- 15:15-16:30** **Parallel Workshops, Round 2 – Modules A, B, C, D**
- Workshop A-2** **Climate Change: What Next?**  
*Millenia 5*
- Humanity faces substantive environmental challenges in every region of the world and philanthropic initiatives can often play a crucial role in pointing to new solutions. Take the case of climate change. California Environmental Associates (CEA) estimates that philanthropic funding could mitigate 11 gigatons of annual CO<sub>2</sub> emissions. However, this would require targeted funding of US\$ 525-660 million per annum – as compared to current funding of US\$ 176 million. What are the smart options on the table? And what are the scenarios at the policy level?
- Moderator:*  
**Joshua Reichert**, Managing Director, Pew Charitable Trusts, USA
- Discussants:*  
**Huang Ming**, Chairman, Himin Group, China  
**Don Mohanlal**, CEO, The Nand and Jeet Khemka Foundation, India
- Challenger:*  
**Kim Campbell**, Member of the Board, Club de Madrid, Spain
- Workshop A-3** **Education: Shifting Out the Possibility Frontier**  
*Millenia 6*
- Education empowers people by creating economic opportunity, stimulating social inclusion, and giving individuals the ability to make informed choices. As a holistic tool for social transformation, education is thus not only an end in itself as per the Millennium Development Goals, but also a means to achieve other objectives such as public sector reform and public health delivery. Where can education bring about positive social change? How can philanthropists, given their finite personal resources, shift out the current possibility frontier?
- Moderator:*  
**Scott Weber**, Director-General, Interpeace, Switzerland
- Discussants:*  
**Cecilia Cordeiro**, Co-Founder, Red de Acción Política, Argentina  
**Herby Rosenberg**, Co-Founder and Executive Deputy Chairman, MaAfrika Tikkun, South Africa
- Challenger:*  
**Iqbal Noor Ali**, CEO, Aga Khan Foundation, USA

**Workshop B-3 Structure Follows Strategy: Choosing Vehicle and Jurisdiction**

*Garden Room*

In allocating and managing their resources, philanthropists must make several decisions. One is the choice of jurisdiction – where will the foundation or trust’s legal presence be established? The choice of optimal jurisdiction is a function of balancing legal, fiscal, operational, reputation, and risk management considerations: Where are the designated philanthropic assets right now? Where and how should the endowment be invested and in which asset classes? Who are the final charitable beneficiaries on the ground? How visible does the donor want to be and what governance objectives does he or she have? How can one clarify preferences at an early stage of setting up a foundation or trust to achieve the philanthropic venture’s long-term objectives?

*Moderator:*

**Tim Nielander**, General Counsel, GAVI Fund and GAVI Foundation, USA and Switzerland

*Discussants:*

**Olga Alexeeva**, Head of CAF Global Trustees, Charities Aid Foundation, UK

**Benoît Merkt**, Partner, Lenz & Staehelin, Switzerland

*Challenger:*

**Carter Tseng**, Trustee, give2Asia, USA; Founder and CEO, Little Dragon Foundation, Taiwan

**Workshop B-4 Designing Field Visits: From Staged Performance to Real Insight**

*Soong Room*

Field visits can provide existential insights into lives and complex issues and act as a powerful booster to one’s philanthropic commitment. But when a donor visits, there is always the risk of a staged performance – making the grantee look good rather than providing a comprehensive picture that accelerates learning and problem-solving. What are the ingredients needed to ensure that a field visit delivers real insights?

*Moderator:*

**Chris Cusano**, Director, Entrepreneur-to-Entrepreneur Program, Ashoka Asia

*Discussants:*

**Salvatore LaSpada**, Chief Executive, Institute for Philanthropy, UK

**Kimy Tsukamoto**, Director and Regional Representative, Ashoka, Brazil

*Challenger:*

**Daniel Siegfried**, Co-Founder, Child’s Dream, Thailand

**Workshop C-3 Socially Responsible Investing: More Impact, More Performance?**

*Chihuly 1*

The definition of what constitutes socially responsible investing (SRI) has expanded substantially in recent years. Today a dynamic and quickly growing segment of the financial services industry, SRI involves several trillion US dollars in professionally managed assets. Responding to rising expectations, SRI strategies today go far beyond simple passive screening of portfolios, to proxy voting, active screening, and building a more active social change agenda. How does SRI achieve social objectives through the market? What are the current and emerging strategies? And how does SRI benefit socially responsible corporations?

*Moderator:*

**Richard Duron**, Vice Chairman Americas International, UBS

*Discussants:*

**Claire Chiang**, President, Singapore Compact; Senior Vice President, Banyan Tree Holdings Ltd., Singapore

**Olivier de Guerre**, Founder, PhiTrust, France

**Álvaro Rodríguez**, Co-Founder and Managing Partner, IGRIA, Mexico

*Challenger:*

**Christian Gruenler**, Director, SOS Children’s Villages, Germany

**Workshop C-2 Alternative Investments with Social Impact: A New Asset Class?**

Chihuly 2

Large US university endowments have achieved high financial returns by allocating a significant percentage of their portfolio to non-traditional asset classes such as private equity, hedge funds, or commodities. However, today a host of investment options are emerging in this space that promise social impact as well. Microfinance investments, for instance, are loosely correlated to traditional asset classes. Private equity and venture capital invested in small enterprises in Africa similarly, can have significant economic benefits. Where are the opportunities? What are the do's and don'ts for philanthropists looking to access such opportunities?

*Moderator:*

**Cornelius Pietzner**, Executive Council, General Anthroposophical Society, Switzerland

*Discussants:*

**Søren Mouritsen**, Founding Partner, The International Entrepreneur Fund, Switzerland

**Damian von Stauffenberg**, Founder and CEO, MicroRate, USA

*Challenger:*

**Sasa Vucinic**, Co-Founder and Managing Director, Media Development Loan Fund, Singapore

**Workshop D-2 The End of Nature? A Marine Conservation Case Study**

Millenia 4

*In collaboration  
with the National  
Geographic  
Society*

Twenty percent of the world's coral reefs are damaged beyond repair and further ecological stress continues apace. Yet, it is often difficult to mobilize interest and resources in marine conservation, which poses a multi-faceted challenge for conservationists. How can philanthropists contribute to reverse the decline of ocean life? Taking a hands-on approach, this workshop will encourage participants to solve the specific challenge of marine conservation by building a program to convene stakeholder groups and institutions.

*Moderator:*

**Marcello Palazzi**, Member of the Board, Tällberg Foundation; President, Progressio Foundation, Netherlands

*Discussants:*

**Terry Garcia**, Executive Vice-President, Mission Programs, National Geographic Society, USA

**Enric Sala**, National Geographic Fellow, Spain

*Challenger:*

**Frederick Chien**, Chairman, Cathay Charity Foundation, Taiwan

**16:30-17:15 Tea and Coffee Break**

Green House

**17:15-18:15 Panel Discussion: Building Change Communities**

Chihuly

In a world characterized by increasing complexity and asymmetric interdependence, the opportunities for impact are expanding: never before have individuals been more powerful initiators of change. Nevertheless, when moving from advocacy to delivery, the scale of social challenges often overwhelms the ambitions of a single individual. What can philanthropists contribute to formulating and implementing appropriate responses? What are realistic expectations regarding collaboration?

*Moderator:*

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

*Discussants:*

**Claire Chiang**, President, Singapore Compact; Senior Vice President, Banyan Tree Holdings Ltd, Singapore

**Jon Lane**, Executive Director, Water Supply and Sanitation Collaborative Council, Switzerland

**Paul O'Connell**, President, FDO Partners; Philanthropist and Supporter of GAVI Alliance, Switzerland

**Bridgette Radebe**, President, South African Mining Development Association, South Africa; Executive Chairperson, Mmakau Mining

**Damian von Stauffenberg**, Founder and CEO, MicroRate, USA

**18:15-19:00 Break**

**19:00-19:30 Transfer**

**19:30-22:30 The Forum Dinner**

*Chijmes Hall*

As per the Philanthropy Forum's tradition, the dinner will provide an opportunity to exchange, inspire and be inspired in a very special setting.

*Keynote Speaker:*

**Jet Li**, Actor and Founder, Jet Li One Foundation Project, China

**22:30-23:00 Transfer**

**23:00-00:00 Open Bar**

## Day Two: Saturday, September 13, 2008

**08:45-09:30** Coffee and Transfer

**09:30-11:00** Philanthropy Field Sessions and Workshops Track C and D

**Field Session F-1 Individualizing Healthcare: The Genome Institute**

*Genome Institute*

The Genome Institute of Singapore (GIS) is the national flagship program to develop a world-class genomics institute investigating post-sequence questions. As a center for genomic discovery, GIS pursues the integration of technology, genetics, and biology towards the goal of individualized medicine. The genomics infrastructure at GIS will be utilized to train new scientific talent, to function as a bridge for academic and industrial research, and explore scientific questions of high impact.

*Session Leader:*

**Edison Liu**, Executive Director, Genome Institute, Singapore

**Field Session F-2 Sports 4 Social Change**

*Singapore  
Sports School*

Sports and philanthropy offer a powerful combination: sport connects people, teaches values, and sets stretch goals. Most philanthropists or organizations supporting sports-based initiatives face two positioning options. Sport can be seen primarily as an expression of human excellence and aspirations. This implies a smaller set of beneficiaries and initiatives focusing on niches, rewarding excellence in a given field. More often, however, philanthropists view sport as a tool towards achieving broader human development and social policy goals. Such initiatives either integrate sports into development programs or advance humanistic ideals such as equity, merit and inclusion and target larger beneficiary populations. The group will visit the Singapore Sports School, a powerful example of the transformative potential of sports.

*Session Leaders:*

**Deborah Tan Mei**, Principal, Singapore Sports School, Singapore

**Christoph Schmocker**, Executive Director, UBS Optimus Foundation, Switzerland

**Mel Young**, Founder and President, Homeless World Cup, UK

**Field Session F-3 The Sanitation Experience: Scaling Smart Solutions**

*Sanitation Site*

42% of the world's population, or 2.6 billion people, have no access to proper sanitation. In spite of a Millennium Development Goal to halve this number by 2015, there has been little improvement so far. Market-based approaches may hold promise, if we are to substantially achieve scale. What are some of the existing sanitation initiatives where philanthropic capital can catalyze a win-win outcome? How can we engineer a breakthrough?

*Session Leaders:*

**Guy Hutton**, Senior Economist, Water and Sanitation Program, World Bank, USA

**Jon Lane**, Executive Director, Water Supply and Sanitation Collaborative Council, Switzerland

**Jack Sim**, Founder, World Toilet Organization, Singapore

**Arthur Wood**, Director, Social Financial Services, Ashoka, UK

- Workshop C-5 Integrating the Bottom of the Pyramid: Beyond Microfinance**  
*Millenia 6* Over the past 20+ years, microfinance institutions have “graduated” from credit-providing NGOs to fully-fledged financial services institutions to the world’s micro-entrepreneurs, providing access to working and growth capital and insurance. Philanthropists have routinely played a key role in stimulating innovations in the microfinance space. What is the next big thing in financial products for social change?
- Moderator:*  
**Olivier de Guerre**, Founder, PhiTrust, France
- Discussants:*  
**Álvaro Rodríguez**, Co-Founder and Managing Partner, IGNIA, Mexico  
**Damian von Stauffenberg**, Founder and CEO, MicroRate, USA
- Challenger:*  
**David Dror**, Founder, Microinsurance Academy, India
- Workshop D-3 A Dive into the World’s Oceans**  
*Millenia 4* Marine biologist Sylvia Earle will narrate a virtual journey through the oceans from the surface to the deep, from the pristine to the degraded. Sometimes known as “Her Deepness” or the “Sturgeon General,” she has been an Explorer-in-Residence at the National Geographic Society since 1998, the year *Time* magazine named her their first “hero for the planet.” Earle has pioneered research on marine ecosystems and has led more than 60 expeditions totaling more than 6,000 hours underwater. She holds numerous diving records, including setting the depth record for solo diving at 3,300 feet (1,000 meters). She served as chief scientist of the US National Oceanic and Atmospheric Administration. She describes the ocean as the cornerstone of Earth’s life-support system, vital for the survival and well-being of humankind. As Earle says, the ocean has no borders and we must all focus our energies on critical conservation.
- Session Leaders:*  
**Sylvia Earle**, Explorer-in-Residence, National Geographic Society, USA  
**Terry Garcia**, Executive Vice-President, Mission Programs, National Geographic Society, USA  
**Enric Sala**, National Geographic Fellow, Spain
- 11:00-11:30 Transfer**
- 11:30-11:45 Back from the Field: Overview of Day Two**  
*Grand Ballroom* Our goals for the day: how can we make inspiration and insights actionable?
- Speakers:*  
**Andreas Ernst**, Deputy Global Head, UBS Philanthropy Services  
**Maximilian Martin**, Global Head, UBS Philanthropy Services
- 11:45-12:15 Saturday Keynote:**  
**The “Global Associational Revolution”: Can We Sustain Its Future?**  
 The world is in the midst of a massive upsurge of organized, private, voluntary activity that has transformed the global non-profit sector into a massive economic and political force. Yet even in many OECD countries, the ability of this set of institutions to sustain itself hangs in the balance while elsewhere the sector’s development remains stunted. To take full advantage of the enormous opportunity, we must learn to make the maximum use of the human and financial resources available. In this keynote, a long-time non-profit observer will outline his thoughts about some of the critical steps that are needed.
- Speaker:*  
**Lester Salamon**, Director, Center for Civil Society Studies, Johns Hopkins University, USA

**12:15-13:45 The Leaders' Lunch II**  
*Grand Gallery* Inspired by the lunch keynote, table facilitators will lead informal discussions

*Keynote Speaker:*

**Ronnie Chan**, Chairman, Hang Lung Properties Limited, Hong Kong

**13:45-15:00 Venture Labs**

Venture Labs offer participants the opportunity to evaluate a range of existing social intervention options. In a speed pitch mode, exponents have seven minutes to present their initiatives, which will then be scrutinized and "grilled" by an assessment board for another seven minutes. In the second half, we open up for general discussion.

**Venture Lab V-1 Assessing Innovative Grant-Making Opportunities**

*Millenia 2*

Many philanthropists want to intervene through donations along topical or regional preferences. What are the latest innovations on offer?

*Moderator:*

**Scott Weber**, Director-General, Interpeace, Switzerland

*Exponents:*

**Craig Burgess**, Senior Programme Officer, GAVI Alliance, Switzerland

**Andreas Heinecke**, Founder, Dialogue in the Dark, Germany

**Karen Tse**, Founder and CEO, International Bridges to Justice, Switzerland

*Assessment Board:*

**Iqbal Noor Ali**, CEO, Aga Khan Foundation, USA

**Jacquie Hollister**, Senior Vice-President, Development, National Geographic Society, USA

**Kimy Tsukamoto**, Director and Regional Representative, Ashoka, Brazil

**Lee Poh Wah**, Program Director, Lien Foundation, Singapore

**Venture Lab V-2 Assessing Innovative Growth-Finance Social Investments**

*Millenia 3*

Philanthropists are a critical source of "patient" finance for social enterprises, particularly at the start-up or expansion stages. What are the latest social finance innovations on offer?

*Moderator:*

**Andreas Ernst**, Deputy Global Head, UBS Philanthropy Services

*Exponents:*

**David Dror**, Founder, Microinsurance Academy, India

**Jordan Kassalow**, Chairman and Co-Founder, VisionSpring, USA

**Jack Sim**, Founder, World Toilet Organization, Singapore

*Assessment Board:*

**Willie Cheng**, Chairman, Lien Centre for Social Innovation, Singapore

**Alexey Germanovich**, Senior Vice-President, Severstal, Russia

**Kristine Pearson**, CEO, Freeplay Foundation, UK

**Venture Lab V-3 Assessing Innovative For-Profit Social Investments**

*Millenia 4*

Social finance has seen a remarkable innovation curve in recent years, framing investments geared at social change according to preferences such as risk appetite, time horizon and required level of monitoring. What are the most recent innovations in the field?

*Moderator:*

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

*Exponents:*

**Olivier de Guerre**, Founder, PhiTrust, France

**Ngozi Edozien**, CEO, Equity Vehicle for Healthcare in Africa, Mauritius

**Álvaro Rodríguez**, Co-Founder and Managing Partner, IGNIA, Mexico

**Sasa Vucinic**, Co-Founder and Managing Director, Media Development Loan Fund, Singapore

*Assessment Board:*

**Søren Mouritsen**, Founding Partner, The International Entrepreneur Fund, Switzerland

**Bernard Sabrier**, Founder, Children Action Foundation, Switzerland

**Rory Stear**, Founder and Chairman, Freeplay Energy, UK

- 15:00-16:00** **Closing Panel: Reporting Back, Looking Ahead – What Did We Learn?**  
*Millenia 1* Forum participants summarize their insights, observations from the field sessions and venture labs, and share their vision. How can we foster meaningful change? When does collaboration make sense, and how can we make it work? What did we learn? Are there some immediate opportunities for action?
- Moderator:*  
**Cornelius Pietzner**, Executive Council, General Anthroposophical Society, Switzerland
- Discussants:*  
**Frederick Chien**, Chairman, Cathay Foundation, Taiwan  
**Francis Pinto**, Co-Founder, Xandev Foundation, UK  
**Karen Tse**, Founder and CEO, International Bridges to Justice, Switzerland  
**Pier Mario Vello**, Secretary General, Cariplo Foundation, Italy
- 16:00-16:30** **Closing Keynote:**  
**Intangible Assets and a Sense of Purpose: The Philanthropic Family**  
 Philanthropy provides a powerful conduit for aligning family values and defining a family's place in the community. Embedded in the family "DNA," they can provide a sense of purpose and guidance over multiple generations. Accompany us on a famous family's philanthropic journey.
- Speaker:*  
**Kathleen Kennedy**, Philanthropist, USA
- 16:30-17:00** **Concluding Remarks and Launch Announcement**
- Speaker:*  
**Maximilian Martin**, Global Head, UBS Philanthropy Services
- 17:00-17:15** **Farewell Greeting**
- Speaker:*  
**Kathryn Shih**, Member of the Group Managing Board, Head Wealth Management Asia Pacific, Global Wealth Management & Business Banking, UBS
- 17:15-18:15** **Break**
- 18:15-18:45** **Transfer**
- 18:45-19:45** **Cocktail**  
*The Arts House*
- 19:45-21:15** **Farewell Dinner**
- 21:15-22:15** **Building to Last: A Keynote Conversation**
- Moderator:*  
**Maximilian Martin**, Global Head, UBS Philanthropy Services
- Speaker:*  
**Lee Kuan Yew**, Minister Mentor, Singapore
- 22:15-22:45** **Transfer**
- 22:45-00:00** **Open Bar**
- 00:00** **End of Event –**

## (Optional) Day Three: Sunday, September 14, 2008

**07:30-09:00 Breakfast**

**09:00-09:30 Overview of Additional Activities: Working through Your Philanthropy**

*Millenia 4*

The Global 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 three core elements of building change communities: identifying smart solutions, understanding family and governance needs, using the full social investment toolbox to drive impact, and a close look at marine conservation. On day three, we will engage in working on both individual solutions and contributing to the field at large.

*Advisory Sessions.* A select group of specialists and the UBS Philanthropy Services team offer the option to work through individual participants' philanthropic projects in a customized workshop session. Participants are invited to sign-up on a first-come first-served basis during the Forum and respond to a questionnaire to facilitate preparation of the advisory session.

*External Events.* UBS Philanthropy Services is proud to partner with a host of Singapore-based organizations in the context of the 2008 Forum. These side events enable Forum speakers to share their insights with the public at large in Singapore, thus contributing to exchange and development of expertise in the region.

*Speaker:*

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

**09:30-12:30 Option 1 – Private Advisory Sessions**

*Upon request*

*Specialists:*

UBS Philanthropy Services in collaboration with external specialists

**Throughout  
the Day Option 2 – External Side Events**

The Global UBS Philanthropy Forum presents participants with cutting-edge global expertise within the fields of philanthropy, social investment, and civil society, in partnership with leaders worldwide.

On September 14-15, 2008, participants are invited to join us at a set of pre-defined public side events. For a detailed program, please consult the relevant information in the conference binder and please note that some of the external events may be open to the general public in Singapore.

# Non-Fundraising Policy Global UBS Philanthropy Forum

**Singapore, September 12-13, 2008**

The UBS Philanthropy Forum is a knowledge exchange platform for the benefit of our clients and partners. During the course of the event, UBS therefore kindly asks all event participants to refrain from engaging in fundraising for particular organizations or projects.

UBS Philanthropy Services

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