



Program  
The UBS Philanthropy Roundtable  
New York, 19 November 2008



# Program\*

**Wednesday, November 19, 2008**

**1:30-2:00 Registration**

**2:00-2:15 Joint Welcome and Opening Remarks**

*Speakers:*

**Rebecca Robertson**, President and CEO, Park Avenue Armory, USA

**John Straus**, Head, UBS Private Wealth Management, Chairman, Private Bank UBS Wealth Management US

**2:15-2:30 Building Change Communities:**

**What Do We Want to Achieve?**

How can philanthropists best contribute to formulating and implementing appropriate responses to today's pressing issues?

Endowed with the existential freedom to back new ideas and "noisy" advocates, they are in principle uniquely well positioned to make a difference. But consider also that many challenges in areas such as public health, education, and the environment are so extensive that it makes little sense to go it alone.

What forms of collaboration unlock superior impact, and when do partnerships end up undermining the catalytic power of philanthropy?

*Speaker:*

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

\* The program is subject to updates

### 2:30-3:15 **Opening Keynote: Common Wealth**

The crises 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. The good news is that solutions are readily at hand. What are the remedies? How can philanthropists and citizens around the world partner to roll them out on the scale required?

*Speaker:*

**Jeffrey Sachs**, Director of The Earth Institute, Quetelet Professor of Sustainable Development; Professor of Health Policy and Management at Columbia University, USA; Special Advisor to the United Nations Secretary General on the Millennium Development Goals

### 3:15-3:30 **Tea and Coffee Break**

### 3:30-4:45 **Parallel High-Impact Workshops**

In the workshops, we will look at concrete examples of philanthropic organizations engaging in collaborative change strategies. What worked and what did not? What are the lessons? Insights are applicable to most philanthropic agendas.

#### **Track 1 Building a Change Community for Public Health**

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:*

**Mark Kramer**, Co-Founder, FSG Social Impact Advisors, USA

*Discussants:*

**Seth Berkley**, CEO, International AIDS Vaccine Initiative, USA  
**Ngozi Edozien**, CEO, EVHA, Mauritius

*Challenger:*

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

#### **Track 2 Environmental Philanthropy: Cooperation 3.0**

Humanity faces substantive environmental challenges in every region of the world. Despite progress in collective environmental action, ecological degradation continued in the last decade. The extent and causes of climate change, desertification, ozone layer depletion, biodiversity loss, and ever scarcer water and energy resources are all preoccupying.

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 sustainability goals?

*Moderator:*

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

*Discussants:*

**Terry Garcia**, Executive Vice President, Mission Programs, National Geographic Society, USA  
**Joshua Reichert**, Managing Director, Pew Charitable Trusts, USA  
**Scott Weber**, Director General, Interpeace, Switzerland

*Challenger:*

**Bill Drayton**, Founder and President, Ashoka, USA

### 4:45-5:00 **Tea and Coffee Break**

**5:00-5:30 Keynote Conversation:**

**Getting our Hands around the Malaria Challenge**

The malaria challenge epitomizes many of the issues that confront us. Every year, more than 500 million people become severely ill with malaria, and one million die of this disease. Most of the deaths occur in poor countries, especially in Sub-Saharan African. Malaria is both a disease commonly associated with poverty, and a cause of poverty: it causes an average loss of 1.3% annual economic growth in countries with intense transmission. Recently, several international initiatives have been established in order to fight this disease. What role can philanthropists play in the global eradication of malaria?

*Speaker:*

**Ray Chambers**, United Nations Secretary-General's Special Envoy for Malaria; Philanthropist

**5:30-6:30 Discussion Panel: Bringing It Together – Reporting Back**

Roundtable rapporteurs summarize their insights. How can we foster meaningful change? When does collaboration make sense, and how can we make it work? What did we learn? And what are some immediate opportunities for action?

*Moderator:*

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

*Panelists:*

**Seth Berkley**, CEO, International AIDS Vaccine Initiative, USA

**Bill Drayton**, Founder and President, Ashoka, USA

**Mark Kramer**, Co-Founder, FSG Social Impact Advisors, USA

**Joshua Reichert**, Managing Director, Pew Charitable Trusts, USA

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

**6:30-6:40 Setting Aspirations and Getting Partnerships Right\***

A renowned filmmaker and philanthropist shares his personal experience: helping developing countries conserve their cultural heritage through the preservation of their cinematic treasures.

*Speaker:*

**Martin Scorsese**, Film Director and Philanthropist, USA

**6:40-6:50 Concluding Remarks: Where Do We Go from Here?**

From a Monday-morning foundation board perspective, what are the key takeaways, and how are they best communicated?

*Speaker:*

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

**6:50-7:05 Farewell Address**

Raising the bar in philanthropy often involves crossing boundaries – between sectors, disciplines, and intervention models. A renowned scholar shares his views.

*Speaker:*

**Paul Schervish**, Director, Center on Wealth and Philanthropy, Boston College, USA

**7:05-7:30 Cocktail**

**7:30-10:00 The Roundtable Dinner at The Armory**

To round out a day of work, the dinner provides participants an opportunity to compare notes, share insights and jointly reflect on ideas, examples and aspirations put forth at the Roundtable – in the informal, safe-space setting that is characteristic of UBS Philanthropy Services' knowledge exchange events.

\* Via Video

## Speaker Biographies



**Seth Berkley** is President, CEO and founder of the International AIDS Vaccine Initiative (IAVI), a global not-for-profit organization, operational in 24 countries, working to ensure the development of safe, effective, accessible, preventive HIV vaccines for use throughout the world. He is a medical doctor specializing in infectious disease epidemiology and international health. Prior to founding IAVI in 1996, Dr. Berkley was the Associate Director of the Health Sciences Division at The Rockefeller Foundation. He has worked for the Center for Infectious Diseases of the US Centers for Disease Control, the Massachusetts Department of Public Health, and for the Carter Center, where he was assigned as an epidemiologist at the Ministry of Health in Uganda. The author of over 85 publications, Dr. Berkley has written extensively on infectious disease and frequently serves as a media commentator on health technology development, AIDS and global health issues. Dr. Berkley is an adjunct Professor of Public Health at Columbia University and an adjunct Professor of Medicine at Brown University.



**Ray Chambers** is the Special Envoy of the United Nations Secretary-General for Malaria. Mr. Chambers is a philanthropist who has directed most of his efforts towards children. He is co-founder of the National Mentoring partnership and Founding Chairman of both the Millennium Promise Alliance and Malaria No More. He is also the Founding Chairman of the Points of Light Foundation and co-founder of America's Promise Alliance, along with General Colin Powell. He is committed to the philanthropic support of organizations that help to revitalize underprivileged communities by investing in at-risk youth, especially in his hometown of Newark, New Jersey.

Mr. Chambers is the Founding Chairman of the New Jersey Performing Arts Center and is a member of the President's Council on Service and Civic participation. His board memberships include The National Mentoring partnership, The Points of Light Foundation/Hands on Network, America's Promise Alliance, Communities in Schools, University of Notre Dame, and American Museum of Natural History. Mr. Chambers has also enjoyed a varied and extensive career in the corporate world. He is the former Chairman of Wesray Capital Corporation, which he co-founded with William E. Simon.



**Ngozi Edozien** became CEO of EVHA in April 2008. Ms. Edozien started her professional career in investment banking with training in financial markets and corporate finance, first at Solomon Brothers and later at JP Morgan, both in New York City. After leaving JP Morgan to pursue an MBA, she served post MBA at McKinsey & Co. in London and Paris as Associate Principal. Subsequently, Ms. Edozien joined Pfizer as Vice-President Strategic Planning and Business Development. Her role immediately prior to joining EVHA was Regional Director for Pfizer in Anglophone East, West and Central Africa until March 2008. Ms. Edozien holds a BA in Social Studies (Government, Philosophy and Economics) from Harvard and Radcliffe Colleges, and an MBA from Harvard Business School. She is a founding member of the Research Based Pharma Industry Association in Nigeria, a founding member and Board Member of the American Business Council in Nigeria, a Board Member of Africa Investor Magazine, a Member of the Private Sector Advisory Council to the President of Senegal and the Delta State, Nigeria Vision 20/20 Steering Committee.



**Bill Drayton** is the Chair and Chief Executive Officer of Ashoka: Innovators for the Public. Mr. Drayton is a social entrepreneur. As a student at Harvard, Balliol College in Oxford University and Yale Law School, he was active in civil rights and founded a number of organizations, such as Harvard's Ashoka Table, an interdisciplinary weekly forum in the social sciences. In 1981, while working part-time at McKinsey &

Company in New York, he launched both Ashoka and Save EPA and its successor, Environmental Safety. In 1984, with support he received when elected a MacArthur Fellow, he was able to devote himself fully to Ashoka. Mr. Drayton is also Chair of Youth Venture, Community Greens, and Get America Working! He has won numerous awards and honors throughout his career. In 2005, he was selected one of America's Best Leaders by *US News & World Report* and Harvard's Center for Public Leadership. In the same month he was awarded Yale Law School's highest alumni honor, The Yale Law School Award of Merit – for having made a substantial contribution to Public Service. In 2006, he was recognized as being one of Harvard University's 100 "Most Influential Alumni".



**Terry Garcia** is Executive Vice-President for Mission Programs for the National Geographic Society and is responsible for its core mission programs, including more than 400 scientific field research, conservation and exploration projects annually. Mr. Garcia also oversees the Society's Explorers-in-Residence and Emerging Explorers programs, geography and science education programs, fund-raising, traveling exhibitions, and live events. Previously he was Assistant Secretary of Commerce for Oceans and Atmosphere, and Deputy Administrator of the National Oceanic and Atmospheric Administration (NOAA), where he directed US coastal, ocean, and atmospheric programs, including recovery of endangered species, habitat conservation planning, Clean Water Act implementation, the development of the national marine sanctuary system and commercial satellite licensing. As NOAA's general counsel he led the implementation of the Exxon Valdez Oil Spill Restoration Plan for Prince William Sound and the Gulf of Alaska. Mr. Garcia also serves on many advisory boards.



**Mark Kramer** is a founder and Managing Director of FSG Social Impact Advisors, a consulting firm with offices in Boston, San Francisco, Seattle and Geneva. FSG consults corporations and foundations on developing strategies and measuring impact for corporate social responsibility and philanthropic initiatives. He is also a founder of the Center for Effective Philanthropy, a non-profit research organization in Cambridge, Mass., and a Senior Fellow at Harvard's Kennedy School of Government. Mark Kramer has published extensively on the development of effective practices in CSR and philanthropy, and he is co-author, with Professor Michael E. Porter, of two influential Harvard Business Review articles entitled "Philanthropy's New Agenda: Creating Value" (1999) and "The Competitive Advantage of Corporate Philanthropy" (2002). Previously, he spent 12 years as a venture capital investor. He received a BA from Brandeis University, an MBA from The Wharton School, and a JD from the University of Pennsylvania Law School.



**Maximilian Martin** is Global Head of Philanthropy Services at UBS AG, a dedicated advisory unit that helps clients conceive, set up and monitor effective philanthropic vehicles. He also serves as a Visiting Professor at the University of Geneva, where he teaches philanthropy and social entrepreneurship in the MBA program, and lectures at the University of St.Gallen. Previous engagements include serving as Head of Research at the Schwab Foundation for Social Entrepreneurship, Senior Consultant with McKinsey & Company, instructor at Harvard's Economics Department, and Fellow at the Center for Public Leadership at the John F. Kennedy School of Government. Dr. Martin's research interests and publications focus on the relationship between globalization, social entrepreneurship and philanthropy, and emerging cross-sector value creation opportunities in this space that involve civil society, private individuals and business. In 2003, he developed the first university course on social entrepreneurship in Europe for the University of Geneva and the Schwab Foundation for Social Entrepreneurship. In 2003-2004, he conceptualized and then set up

the UBS Philanthropy Services model and the UBS Philanthropy Forum. Dr. Martin holds a Master in Anthropology from Indiana University, a Master in Public Administration from Harvard University, and a PhD in Economic Anthropology from the University of Hamburg, Germany.



**Timothy Nielander** serves as General Counsel for the GAVI Foundation and the GAVI Fund, managing legal affairs for the GAVI Alliance's supporting charitable entities in the UK. Before joining the GAVI organization, he worked at the law firm of Preston Gates & Ellis in Seattle, Washington, serving a variety of charitable organizations and global corporations, including Microsoft Corporation, Amazon.com and DaimlerChrysler. Mr. Nielander is qualified as Solicitor in England/Wales and in the US. He holds a JD and an LLM in Intellectual Property Law.



**Joshua Reichert** heads the Environment Group of The Pew Charitable Trusts, a national not-for-profit organization with major offices in Philadelphia and Washington DC. Prior to joining Pew in 1990, Dr. Reichert held various positions within both governmental and non-governmental organizations including Executive Director of the National Security Archive in Washington DC; Vice-President for Conservation at Conservation International; Regional Representative of the Inter-American Foundation; and Special Assistant to the Chairman of the Subcommittee on Foreign Appropriations of the US House of Representatives. Dr. Reichert is the chief architect and founder of various environmental organizations and the author of over 60 publications. He has also co-produced a number of films on the plight of fisheries and other problems affecting marine ecosystems worldwide. His work has been published in over 100 newspapers throughout the United States, and he has appeared on several television news channels. Dr. Reichert holds an undergraduate degree in Applied Behavioral Sciences from the University of California at Davis, and both a Master's and PhD in Social Anthropology from Princeton University.



**Rebecca Robertson** is President and CEO of the Park Avenue Armory. Ms. Robertson is spearheading the USD 200 million restoration of the historic Seventh Regiment Armory and its revitalization as a nonprofit contemporary cultural center. The Armory has recently completed its first year of programming which included co-hosting the Whitney Biennial 2008 and Lincoln Center Festival's Die Soldaten. Previously, as Executive Director of the Lincoln Center Development Project, Inc., Ms. Robertson was responsible for planning the USD 500-plus million Lincoln Center renovation project. As president of The 42nd Street Development Project, Inc. from 1987-1997, Ms. Robertson led the complex USD 1.8 billion transformation of 42nd Street between Broadway and Eighth Avenue, which resulted in six restored theaters, 39 movie screens in two complexes, a 150,000 square-foot wax museum, a blues club, two hotels, headquarters buildings for two major media companies and 300,000 square-feet of shops and restaurants. For her work on 42nd Street, Ms. Robertson was the recipient of the American Institute of Architects George S. Lewis Award and the American Planning Association Public Projects Award. She has also served as a studio critic/lecturer at the Harvard University Graduate School of Design.



**Jeffrey Sachs** is the Director of The Earth Institute, Quetelet Professor of Sustainable Development, and Professor of Health Policy and Management at Columbia University. He is also Special Advisor to United Nations Secretary-General Ban Ki-moon. From 2002 to 2006, he was Director of the UN Millennium Project and Special Advisor to United Nations Secretary-General Kofi Annan on the Millennium Development Goals. Mr. Sachs is President and co-founder of Millennium Promise Alliance, a nonprofit organization aimed at ending extreme global poverty. For more than 20 years he has been at the forefront of the challenges of economic development, poverty alleviation, and enlightened globalization. As a leading voice for combining economic development with environmental sustainability, he leads large-scale efforts to promote the mitigation of human-induced climate change. He is the author of

hundreds of scholarly articles and many books, including the New York Times bestsellers: *Common Wealth* (Penguin, 2008) and *The End of Poverty* (Penguin, 2005).



**Paul Schervish** is Professor of Sociology and Director of the Center on Wealth and Philanthropy at Boston College, and National Research Fellow at the Indiana University Center on Philanthropy. He is senior advisor to the Wealth & Giving Forum. He has served as Distinguished Visiting Professor of Philanthropy at the Indiana University Center on Philanthropy and as Fulbright Professor of Philanthropy at University College, Cork, Ireland, and has been named five times to the *NonProfit Times* "Power and Influence Top 50." Schervish serves as a consultant to financial and development professionals and to wealth holders on the patterns and motivations of charitable giving, on the moral biography of financial life, and discernment as a spiritual process of conscientious decision-making around wealth and philanthropy. Along with John J. Havens, Senior Associate Director of the Center, he authored the report projecting a USD 41 trillion wealth transfer over the first 5 decades of the this century: *Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy*. With Havens he is currently directing the Survey on Wealth, Values, and Philanthropy, funded by the Bill and Melinda Gates Foundation.



**Martin Scorsese** was born in New York City and soon developed a passion for cinema and a particular admiration for neo-realist cinema which inspired him and influenced his view or portrayal of his Sicilian heritage. After graduating from NYU Film School in 1966 and making a number of shorts, he shot his first feature-length film *Who's That Knocking at My Door* (1968) with fellow student, actor Harvey Keitel, and editor Thelma Schoonmaker both of whom were to become long-term collaborators. *Mean Streets* followed in 1973 and provided the benchmarks for the "Scorsese style." After Scorsese directed *Alice Doesn't Live Here Anymore*, the trio was reunited for the dark journey of Travis Bickle in *Taxi Driver*. After *New*

*York, New York Scorsese* released *Raging Bull*. The acclaimed biography of middleweight fighter Jake LaMotta was followed by exploration of fans as pariah in *The King of Comedy*, dark-comic dreams in *After Hours* and pool sharks in *The Color of Money*. Scorsese outraged some religious groups by attempting to portray a human son of God in *The Last Temptation of Christ* before returning to more familiar territory with the mafia in *Goodfellas*. He followed with *Cape Fear*, *The Age of Innocence* and *Casino*. His recent works include *Gangs of New York*, entirely shot in Cinecittà, *The Aviator*, the Bob Dylan documentary *No Direction's Home* and *The Departed*, which earned four Oscars, including best director. He is also Chairman of the World Cinema Foundation, an organization dedicated to preserving and restoring neglected films from around the world.



**John Straus** joined UBS on October 2006 as the Head of Private Wealth Management. In this key role, he is responsible for the strategic direction and management of the bank's ultra high net worth (UHNW) business, leading the bank's efforts in accelerating growth in this segment, including the delivery of specialized products and services to meet UHNW clients' needs and the build-up of dedicated offices serving these clients. In early 2007, John assumed the additional role and responsibilities of Chairman, Private Bank, Wealth Management US. With over 30 years of wealth management experience, Mr. Straus has a proven record of developing strategies for and providing comprehensive private wealth services to UHNW clients. Most recently, John served as Managing Director and Head of US Private Bank at JP Morgan Chase. Prior to his tenure with JP Morgan Chase, he held various senior leadership positions at Morgan Stanley Dean Witter & Co., including Head of US Private Wealth Management and Municipal National Sales Manager. Prior to that, he was Head of Municipal Trading and Municipal Proprietary Arbitrage at Salomon Brothers, Inc. John earned a Bachelor of Science in finance from Boston College, and an MBA from DePaul University.



**Damian von Stauffenberg** is the founder of MicroRate, a rating agency specializing in microfinance. Before dedicating himself to microfinance, Mr. von Stauffenberg worked for 25 years for the World Bank and its private sector affiliate, the International Finance Corporation (IFC). He has served as President or Head of the Investment Committee/Executive Committee of a number of institutions that pioneered the link between microfinance and capital markets, among them Profund, the first microfinance equity fund, SEED Capital Development Fund, MicroVest and the Latin American Challenge Investment Fund. Mr. von Stauffenberg, a German national, is based in Washington DC. He holds a degree from the University of St.Gallen, Switzerland.



**Scott Weber** is the Director-General of Interpeace, one of the largest peacebuilding organizations in the world and a strategic partner of the United Nations. Chaired by Martti Ahtisaari and headquartered in Geneva, Switzerland, with Regional offices in Nairobi and Guatemala, Interpeace has over 300 colleagues in Somalia, Rwanda, Burundi, Guinea-Bissau, Liberia, Guatemala, Cyprus, Israel and Palestine, Aceh (Indonesia) and East Timor, as well as in a regional program on Youth Gangs in Central America and a thematic program on Constitution-making in post-conflict contexts and on strengthening the role of women in peacebuilding. Interpeace's work was personally highlighted by Bill Clinton at the 2006 and 2007 Clinton Global Initiative meetings as an innovative and important approach to conflict prevention. Mr. Weber began his career in the United Nations, first in humanitarian and then in political affairs. He holds a Bachelor's degree in International Relations, Economics and Russian from Georgetown University. He is a member of the Young Presidents' Organization (YPO).

## About UBS Philanthropy Services

### Turning Philanthropic Aspirations into Impact

Philanthropists give back to society. Their motivations are manifold. Emotions, passions and values play a prominent role: a sense of duty to society, a tradition built on family values, a passionate interest, or a life-changing experience. Some philanthropists seek direct involvement with their beneficiaries. Others prefer to remain behind the scenes.

To respond to these needs, UBS has designed a unique platform providing:

- One-stop access to cutting-edge expertise,
- Implementation solutions in the "jungle" of civil society and the social sector, with
- The excellence and open architecture that are trademarks of UBS.

As the world's leading global Wealth Manager, UBS is able to draw on the expertise of:

- A dedicated Philanthropy Services unit,
- Legal and financial specialists, able to service many jurisdictions and fields, as well as
- Top-tier external providers in the field of foundation advisory and management.

UBS Philanthropy Services covers the complete value chain in philanthropy. Typically, we find that our clients seek solutions to one of the following three situations:

### **Situation 1: "Greenfield" Philanthropy**

*The challenge:*

A client seeks an overview of existing options in the field of philanthropy, and considers creating a dedicated social-purpose vehicle to structure his or her giving.

*Solution path:*

We offer platforms and events on specific and general topics in the field of philanthropy such as the UBS Philanthropy Forum and the UBS Philanthropy Roundtables. They enable philanthropists to meet peers at all stages of the philanthropy lifecycle as well as relevant top-tier experts from civil society. We can advise those who wish to go further on how to select the appropriate legal vehicle, project portfolio and asset management strategy that best support the client's philanthropic objectives.

### **Situation 2: "Established" Philanthropy**

*The challenge:*

A client with an existing social-purpose vehicle (foundation, trust) and a track record in charitable giving seeks to develop a fully-fledged philanthropic identity and legacy.

*Solution path:*

We can advise clients who want to improve processes within existing structure(s) on how to streamline their vehicle management. For those who seek to assess or change their strategic focus, we offer workshops and advisory to reposition their expenditure and investment policies. Also, we can advise those who want to channel philanthropy through their company on how to best calibrate their efforts between general social issues, value chain issues and long-term competitive issues. UBS provides asset management solutions and advisory on how the management of assets and the endowment can be explicitly aligned with the philanthropic mission.

### **Situation 3: Large Foundation Philanthropy**

*The challenge:*

Large philanthropic vehicles have specific needs: how do I best manage a large endowment? What is the optimal portfolio of programs?

*Solution path:*

Increasingly, institutional clients seek to optimize the portfolio of their investments and advisory on the new trend of "mission-related investing." Similar to the case of established philanthropy, UBS provides asset management solutions and advisory on how asset management strategies can be explicitly aligned with the philanthropic mission. Many institutional clients also seek strategy advisory regarding their programs and collaboration with institutional peers. In collaboration with our network of external providers, we offer workshops and strategy advisory. Our philanthropy events offer institutional clients access to best-in-class players in philanthropy.

Please contact us if you are interested in learning more about our structured advisory process or events.

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**Roundtable Concept**

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