

CHALLENGING TIMES NEW OPPORTUNITIES



NOVEMBER 4-6, 2009 • DETROIT

2009 | INDEPENDENT SECTOR AND
COUNCIL OF MICHIGAN FOUNDATIONS
ANNUAL CONFERENCE



INDEPENDENT SECTOR
A vital voice for us all

CMF Council of
Michigan
Foundations
Serving grantmakers. Advancing giving.

Schedule at a Glance

Pre-Conference Sessions—Tuesday, November 3

10:00 a.m.–5:30 p.m.	Public Policy Action Institute (<i>Cadillac Ballroom</i>)
7:00–9:00 p.m.	Global Civil Society Dinner (<i>Richard Room</i>)
7:30–9:00 p.m.	NGen Welcome Reception and Speed Networking (<i>LaSalle and Cadillac Rooms</i>)

Pre-Conference Sessions—Wednesday, November 4

8:00–8:45 a.m.	NGen Orientation (<i>Cabot Room</i>)
8:00 a.m.–12:30 p.m.	Public Policy Action Institute (<i>Cadillac Ballroom</i>)
9:00–11:15 a.m.	NGen Workshops (<i>Richard and Brule Rooms</i>)
9:30–11:00 a.m.	Strategic Development Activities in a Troubled Economy (<i>Nicolet Room</i>)
10:00–11:00 a.m.	Newcomers Conference Orientation (<i>Marquette Room</i>)
10:00 a.m.–1:30 p.m.	Marketplace and Exhibit Hall Grand Opening (<i>Ontario Exhibit Hall, Level 3</i>)
11:30 a.m.–12:30 p.m.	IS New Member Orientation (<i>Nicolet Room</i>)
11:30 a.m.–1:00 p.m.	Special Luncheon Plenary for Michigan Grantmakers: Achieving Higher Impact in the “New” Opportunities in Michigan’s New Economy (<i>Cartier Room</i>)
11:30 a.m.–1:00 p.m.	NGen Keynote Lunch (<i>Cabot Room</i>)

Conference Opening—Wednesday, November 4

1:30–4:00 p.m.	Opening Plenary: Navigating Change Together (<i>Columbus Room</i>)
4:00–4:30 p.m.	Networking Break in the Marketplace (<i>Ontario Exhibit Hall—East, Level 3</i>)
4:30–6:00 p.m.	Breakout Sessions <ul style="list-style-type: none">• By 2020, Nonprofits’ Use of Technology Has Transformed Society (<i>Ontario Hall—West</i>)• Census 2010: Can We Get the Count Right? (<i>Ambassador Salon 3</i>)• Community Foundations’ Leadership Agenda: Now or Never (<i>Marquette Room</i>)• Family Foundations: Doing More with Less (<i>Nicolet Room</i>)• Information As a Core Community Need (<i>Richard Room</i>)• Reinventing Foundations: Shifting Practices for Maximum Impact (<i>Ambassador Salon 1</i>)• What Works: Assessing and Achieving Impact (<i>Ambassador Salon 2</i>)
	CEO Track <ul style="list-style-type: none">• Conversation with Diana Aviv (<i>LaSalle A Room</i>)• The Evolving Role of Nonprofit Boards (<i>LaSalle B Room</i>)
7:00–9:00 p.m.	Host Reception at the Detroit Institute of Arts (<i>More information on pages 8 and 20.</i>)

Thursday, November 5

7:15–8:30 a.m.	Breakfast Buffet (<i>Renaissance Foyer</i>)
7:45–8:30 a.m.	IS Annual Members’ Meeting and Breakfast (<i>Columbus Room</i>)
7:45–8:30 a.m.	CMF Annual Members’ Meeting and Breakfast (<i>Cabot Room</i>)
8:30–9:15 a.m.	Plenary Session: Conversation with Jeff Raikes, Gates Foundation (<i>Columbus Room</i>)
9:15–9:45 a.m.	Networking Break in the Marketplace (<i>Ontario Exhibit Hall—East, Level 3</i>)
9:45–11:15 a.m.	Breakout Sessions <ul style="list-style-type: none">• Avoiding Family Foundation Missteps: Policies and Tools for Good Governance (<i>Marquette Room</i>)• By 2020, Nonprofits Facilitate Broad Civic Engagement that Fuels Our Democracy (<i>Ontario Hall—West</i>)• Corporate Philanthropy: Evolution and Transformation (<i>Ambassador Salon 3</i>)• Diversity Management and Inclusive Culture as a Vehicle for Creating Excellence in Organizations: From Vision to Action (<i>Nicolet Room</i>)• Forging the Nonprofit Community’s Policy Priorities for 2010 (<i>Ambassador Salon 2</i>)• Improving Urban Food Deserts: Local Agriculture, Food Rescue, and Better Public Policy (<i>Richard Room</i>)• Nonprofit Survival Strategies (<i>Ambassador Salon 1</i>)
	CEO Track <ul style="list-style-type: none">• CEO Summit: Innovative Leadership, Critical Thinking for Critical Times (<i>Cadillac Ballroom</i>)
11:15–11:45 a.m.	Networking Break in the Marketplace (<i>Ontario Exhibit Hall—East, Level 3</i>)
11:45 a.m.–1:30 p.m.	Luncheon Plenary: Fashioning Our Future Together (<i>Columbus Room</i>)

Thursday, November 5 (continued)

1:30-2:00 p.m.	Networking Break in the Marketplace (<i>Ontario Exhibit Hall—East, Level 3</i>)
2:00-3:30 p.m.	<p>Breakout Sessions</p> <ul style="list-style-type: none"> • How Can Volunteers Help Your Organization? Or Is That The Wrong Question? (<i>Ambassador Salon 1</i>) • The Nonprofit Community and Health Care Reform (<i>Ambassador Salon 3</i>) <p>CEO Track</p> <ul style="list-style-type: none"> • Organizational and Executive Compensation (<i>LaSalle B Room</i>) • Organizational Restructuring in Turbulent Times (<i>LaSalle A Room</i>)
2:00-5:00 p.m.	<p>Breakout Session</p> <ul style="list-style-type: none"> • FutureLab: By 2020, Nonprofits Lead the Way on Inclusion (<i>Ontario Hall—West</i>)
2:00-5:30 p.m.	<p>Workshops</p> <ul style="list-style-type: none"> • Advanced Practice Workshop with Jan Jaffe (<i>Nicolet Room</i>) • Better Presentations, Stronger Leadership (<i>Monet Room</i>) <p>Site Sessions (<i>More information on pages 24-25</i>)</p> <ul style="list-style-type: none"> • Creativity—A Corridor for Integrating New and Old • Immigration—Everybody Counts in Our Revitalization • The New (Green) Economy • Navigating the Economic Recovery <ul style="list-style-type: none"> Topic 1: Navigating the Financial Crisis 2009 Topic 2: Economic Recovery—Are We There Yet? • Reclaiming Community Assets • Water is the New Oil
3:30-4:00 p.m.	Networking Break in the Marketplace (<i>Ontario Exhibit Hall—East, Level 3</i>)
4:00-5:30 p.m.	<p>Breakout Sessions</p> <ul style="list-style-type: none"> • Advocacy, Coalitions, Communications: What Does It Take to Change Policies and Practices? (<i>Ambassador Salon 1</i>) • Leadership that Cultivates Innovation (<i>Ambassador Salon 2</i>) • Working Effectively with the Administration (<i>Ambassador Salon 3</i>) <p>CEO Track</p> <ul style="list-style-type: none"> • Nonprofit CEO Renewal (<i>LaSalle Room</i>)
5:30-7:00 p.m.	Wine and Cheese Reception (<i>Ontario Exhibit Hall—East</i>)
7:00-9:00 p.m.	John W. Gardner Leadership Dinner (<i>Columbus Room</i>)
9:00-11:00 p.m.	After Hours Social Event (<i>Cabot Room</i>)

Friday, November 6

8:00-9:30 a.m.	Continental Breakfast (8:00-9:00 a.m. located in Ontario Hall—East; 9:00-9:30 a.m. located in the Renaissance Foyer)
8:00-9:00 a.m.	NGen Closing Breakfast (<i>Cadillac Room</i>)
8:00-9:00 a.m.	Hot Topic Round Table Discussions and Breakfast (<i>Ontario Exhibit Hall—East, Level 3</i>)
8:00-9:00 a.m.	<p>Breakout Session</p> <ul style="list-style-type: none"> • Communicating Goals and Strategies for Impact: Nonprofit Effectiveness Advisory Group Meeting (<i>Brule Room</i>)
9:30-11:00 a.m.	<p>Breakout Sessions</p> <ul style="list-style-type: none"> • The Bigger Picture (<i>Ontario Hall—West</i>) • Caring to Change—Enabling Enduring Social Improvements (<i>Marquette Room</i>) • Corporate Philanthropy Programming Best Practices (<i>Richard Room</i>) • Diversity in Nonprofit Leadership: Problems and Solutions (<i>Ambassador Salon 1</i>) • Family Foundations: Documenting Your Legacy (<i>Nicolet Room</i>) • The Road to Economic Recovery: What Do Foundations and Nonprofits Need to Do Now? (<i>Ambassador Salon 3</i>) • Stars, Seals, and Beyond: Getting Nonprofit Impact Ratings Right (<i>Ambassador Salon 2</i>) <p>CEO Track</p> <ul style="list-style-type: none"> • Conversation with the Gardner Leadership Awardee—Geoffrey Canada (<i>LaSalle A Room</i>)
11:30 a.m.-1:30 p.m.	Closing Luncheon Plenary: Strengthening Communities Together (<i>Columbus Room</i>)

Greening the Conference

Thanks to the support of conference sponsors, Independent Sector and the Council of Michigan Foundations continue building on our efforts to be environmentally responsible in all facets of our joint conference operation:

- The Wal-Mart Foundation generously provides reusable water bottles for all participants to refill at drink stations and custom USB flash drives to reduce paper use.
- As part of its commitment to best practices in sustainable printing, Bank of America generously sponsors the printing of all conference publications with soy-based ink on FSC-certified paper.
- Eco-friendly conference tote bags are sponsored by the Aetna Foundation. The bags are made from jute, a natural and sustainable fiber, and come from a fair trade company in Kolkata, India.
- Quicken Loans sponsors the conference lanyards that are made from 100% recycled material.

We are delighted to partner with the Marriott Renaissance Center Hotel, which has an impressive “green” program. The hotel is also arranging a food donation to Forgotten Harvest, metro Detroit’s food rescue organization.

With support from Bank of America, we have partnered with the Student Conservation Association and Detroit urban youth to further promote environmentally responsible practices. Please visit the association’s exhibit booth to learn more about this year’s expanded conference greening effort, Detroit-based major environmental projects, and the association’s programs that help reduce, reuse, and recycle.

Tuesday, November 3

7:00–9:00 p.m.

(Location: Richard Foyer)

Global Civil Society Dinner



Join Rey Ramsey of One Economy Corporation for an exploration of how the current economic crisis requires nonprofits and foundations to engage communities across the world in new ways. One Economy’s innovative approach to empowering and connecting individuals from Detroit to Durban with the tools they need to enter the economic mainstream illustrates how vision, action, and leadership can strengthen communities and improve lives.

Keynote Speaker:

Rey Ramsey, chief executive officer, One Economy Corporation

Moderator:

David Yarnold, executive director, Environmental Defense Fund

Requires special registration; \$95 per ticket.

Twitter at the Conference

We are eager to learn your thoughts during the conference.

Tweet your ideas and reactions using the official conference hashtag:

#iscmf09

NGen participants can also use the hashtag:

#isngen

(Location: Cadillac Ballroom)

Independent Sector's sixth annual Public Policy Action Institute will bring together nonprofit leaders, policy advocates, and communications professionals to develop winning strategies that influence legislation and regulations affecting the ability of nonprofits and foundations to serve their communities. Participants in the Institute will explore the 2010 political landscape at the state and federal levels, join in compelling roundtables on policy issues confronting today's nonprofit sector, and discuss the most effective communications and advocacy strategies to convey key messages to lawmakers and other government officials.

Supported by The Cleveland Foundation and the Joyce Foundation

Tuesday, November 3

10:00 a.m.

Welcome and Introductions

10:15 a.m.

The 2010 Political Landscape at the State and Federal Level

As the new administration and 111th Congress wrap up their first year, Nick Giordano, partner with Washington Council Ernst & Young, will review what was accomplished, what remains to be done, and what can be expected in the year ahead. Meagan Dorsch, public affairs manager for the National Conference of State Legislatures, will discuss how states are addressing the fiscal crisis, as well as the political challenges and issues, states will face in 2010.

11:30 a.m.

Senate Finance Committee: A View from the Inside

Senator Debbie Stabenow (invited), a member of both the Senate Finance Committee and the Budget Committee, will share her views on the implications of the fiscal challenges facing the federal government, as well as other issues affecting the work of foundations and nonprofits in the coming years.

12:00 p.m.

Deli and Discussion

Grab some lunch and join a tabletop discussion to share lessons about and design strategies for addressing such issues as the national broadband plan and its implications for foundations and nonprofits, restrictions on lobbyists and lobbying, the 2010 census and redistricting efforts, health care reform, tax incentives for charitable giving, and reforming the government contracting process.

1:30 p.m.

Tax Reform and the Nonprofit Community

Several tax provisions enacted in 2001 and 2002 are set to expire next year, setting off a major effort by Congress to examine and reform federal tax policies. How will these changes impact the nonprofit and philanthropic community, and what do we need to do to prepare? Three members of the U.S. House of Representatives plan to join this discussion if schedules allow. A team of Capitol Hill veterans will also be on hand to share insights for addressing these critical issues.

2:45 p.m.

Break

3:00 p.m.

Making the Case for Investing in Advocacy

Policy advisors and advocates are always making the case for their organizations to invest—or keep investing—in advocacy. This can require convincing a board, a donor, and even senior management. A panel of experts will discuss research and techniques that help make the case that investing in advocacy can produce real progress toward the outcomes an organization seeks.

Speakers

An-Me Chung, program officer, Charles Stewart Mott Foundation

Aaron Dorfman, executive director, National Committee for Responsive Philanthropy

Jared Raynor, senior consultant, TCC Group

4:15 p.m.**Using Networks to Build Capacity for Policy Advocacy**

A strong network is essential to achieving real policy change—but what does it take to build an effective, lasting coalition? Learn from three outstanding leaders about the strategies they have used to build successful policy networks and coalitions.

Speakers

Ellen Buchman, vice president of field operations,
Leadership Conference on Civil Rights
AnnMaura Connolly, senior vice president, City Year
Jennifer Kottler, senior political director, Sojourners

5:30 p.m.**Wrap-Up**

Wednesday, November 4

8:00 a.m.**Continental Breakfast****8:30 a.m.****Building Effective Relationships with State Government**

State governments have significant authority to regulate foundations and nonprofits, and make critical decisions about how programs and services will be funded and delivered. This session will examine the approaches taken in three different Midwestern states to build stronger relationships between the nonprofit community and state governments.

Speakers:

Karen Aldridge-Eason, foundation liaison to the governor,
State of Michigan
Laurel O'Sullivan, senior director, public policy,
Donors Forum
Jon Pratt, executive director, Minnesota Council of
Nonprofits

9:45 a.m.**Break****10:00 a.m.****Evaluating Advocacy**

There has been tremendous creativity and growth in the field of advocacy evaluation over the last several years, and there are now multiple tools and a growing base of experience to help funders and nonprofits assess their lobbying and advocacy efforts. Three experts who have been at the center of these efforts will draw from their experiences to explain the value of different approaches to evaluation. Participants will walk away with a starter kit of tools, methods, and resources for advocacy evaluation.

Speakers:

Gigi Barsoum, health policy specialist, The California
Endowment
Julia Coffman, senior consultant, Harvard Family Research
Project
Ehren Reed, senior associate, Innovation Network

11:15 a.m.**The Role of Communications in Advocacy**

What communications strategies will best enhance our lobbying and advocacy efforts? This session will explore how various communications tools—from traditional media to e-communications to social networking—have helped or hindered nonprofits and foundations in conveying their value and their policy positions effectively.

Speakers:

Candy Hill, senior vice president of social policy,
Catholic Charities USA
David Morse, vice president of communications,
Robert Wood Johnson Foundation

12:30 p.m.**Wrap-Up and Adjournment**

NGEN: MOVING NONPROFIT LEADERS FROM NEXT TO NOW

Developing the next generation of nonprofit leaders is critical to the ability of charities and foundations to improve lives around the world. The 2009 NGen: Moving Nonprofit Leaders from Next to Now program brings together 200 talented professionals under the age of 40 for the following special sessions that will enhance their knowledge, expand their networks, and address issues of importance to them.

Sponsored by the Annie E. Casey Foundation, CCS, and Commongood Careers

The NGen program is free to under-40 conference participants who have pre-registered for each session. Please visit the registration counter to sign up.

Tuesday, November 3

7:30–9:00 p.m.

NGen Welcome Reception and Speed Networking

(Location: LaSalle and Cadillac Rooms)

NGen participants arriving in Detroit by Tuesday evening are invited to jumpstart the conference experience by meeting other emerging nonprofit leaders during a casual reception and structured networking event.

Wednesday, November 4

8:00–8:45 a.m.

NGen Orientation

(Location: Cabot Room)

The opening session will provide more details about the NGen program and its participants to set the stage for getting the most out of the conference.

Facilitators:

James Siegal, vice president of nonprofit sector programs and practice, Independent Sector
Kristen Cambell, chair, Independent Sector NGen Advisory Group; program director, National Conference on Citizenship



9:00–10:00 a.m.

NGen Workshops

Planning Your Career and Moving Up

(Location: Richard Room)

Are you new to the nonprofit sector or looking to move up in your organization? This practical and participatory workshop will provide you with tools for pursuing a meaningful, sustainable, and well-compensated career in the nonprofit sector. It will examine such strategies as defining core competencies, clarifying goals, pursuing professional development opportunities and graduate degrees, networking, and negotiating a competitive compensation package.

Speakers:

James Weinberg, founder and CEO, Commongood Careers

Moderator:

Kasey Gagnon, director of partnership development, Commongood Careers

After Moving Up, What's Next?

(Location: Brule Room)

Many young leaders spend their early careers achieving their initial goals—becoming a senior manager, leaders, or starting an organization—only to wonder, “now what?” This session will answer that question by exploring: (1) the skill sets needed to change fields or integrate into a new organization; (2) how to manage your personal brand apart from that of your organization; and (3) the role of peers and mentors in bolstering your career.

Speakers:

David Simms, managing partner, Bridgestar,
The Bridgespan Group

Michael Watson, senior vice president of human resources,
Girl Scouts of the USA

Moderator:

Michael Smith, vice president of social innovation,
The Case Foundation

10:15–11:15 a.m. NGen Workshops

Fundraising Strategies for a Changing Economy

(Location: Brule Room)

It is critical in any economic environment to understand the practices that help charitable organizations maintain powerful fundraising programs. This session will analyze the current philanthropic landscape and provide a case study on a local innovative fundraising campaign. Join a discussion to learn best practices on how to adopt new, innovative fundraising strategies and position your organization for a successful future.

Speakers:

Kevin Cherep, vice president, CCS
David Ripple, vice president for development
and alumni affairs, Wayne State University

Moderator:

Dierk Hall, vice president, City Connect Detroit

Working Effectively with Every Generation

(Location: Richard Room)

What tools do emerging leaders need to thrive in their organizations? How can they develop productive working relationships with both those they report to and those they supervise? Join this session for ideas on how to better understand multi-generational leadership within your organization, develop mutual mentoring and peer coaching opportunities, and structure work projects to meet your needs and the needs of your organization. Featured in this session will be a recent study by the Building Movement Project and Idealist.org, with support from the American Express Company, about ways to work more efficiently and effectively across generations.

Speakers:

Christine Rhee, manager, American Express Company
Frances Kunreuther, director, Building Movement Project,
Demos: A Network for Ideas and Action

Moderator:

Trish Tchume, director of civic engagement, Building
Movement Project, Demos: A Network for Ideas
and Action

11:30 a.m.–1:00 p.m. NGen Keynote Lunch

(Location: Cabot Room)

Connect with your NGen colleagues at an inspiring keynote presentation prior to the start of the main conference. This will also be the first opportunity for participants to engage with established IS leaders serving as NGen Ambassadors throughout the conference.

Emcee:

Brian Gallagher, chair, Independent Sector; president and CEO, United Way Worldwide

Speakers:

Richard Brown, vice president of philanthropy, American Express Company
Rev. Peg Chamberlin, executive director, Minnesota Council of Churches; president-elect, National Council of Churches
J.D. Hokoyama, vice chair, Independent Sector; president and CEO, Leadership Education for Asian Pacifics

Keynote Speaker:

Joshua DuBois, executive director, White House Office of Faith-Based and Neighborhood Partnerships

Friday, November 6

8:00–9:00 a.m.

NGen Closing Breakfast

(Location: Cadillac Room)

Join your NGen colleagues and IS president and CEO Diana Aviv to examine what you've learned during the conference and explore ideas for building on your conference experience.

Facilitator:

Diana Aviv, president and CEO, Independent Sector

NGen participants have opportunities to network with NGen Ambassadors, established leaders who have agreed to serve as a resource to the next generation of leaders during the conference. In addition to table discussions at the Keynote Lunch on Wednesday, NGen participants and Ambassadors are encouraged to gather near the NGen Lounge during the conference-wide Wine and Cheese Reception on Thursday, 5:30–7:00 p.m. The NGen Lounge, a place for emerging leaders to connect, recharge, and share, is located in the exhibit hall.

CONFERENCE SCHEDULE

8:00–8:45 a.m.

NGen Orientation

Please see page 14 for more details.

9:00–11:15 a.m.

NGen Workshops

Please see pages 14-15 for more details.

9:30–11:00 a.m.

Strategic Development Activities in a Troubled Economy

(Location: Nicolet Room)

Pre-conference session for CMF-member community foundations

With the economic downturn, community foundations are experiencing increased demand for services and grantmaking at a time of smaller asset values and decreased funding. This session will explore strategic ways to raise funds that provide the resources to address the needs of the regions your community foundation serves.

Speaker:

Robin Ferriby, vice president, philanthropic services, Community Foundation for Southeast Michigan

10:00–11:00 a.m.

Newcomers Conference Orientation

(Location: Marquette Room)

Join an orientation to the “meeting ground” provided by the IS/CMF conference and get a head start on the issues on the agenda for the next three days.

Facilitators:

Hassan Jaber, executive director, Arab Community Center for Economic and Social Services
 Mariam Noland, IS board member; president, Community Foundation for Southeast Michigan
 Sherry Rockey, vice president of organization effectiveness, Independent Sector

11:30 a.m.–12:30 p.m.

IS New Member Orientation

(Location: Nicolet Room)

Learn more about Independent Sector and how to get involved. This orientation is both for new members and those considering joining.

Facilitators:

Michael Piraino, chief executive officer, National CASA
 Luz Vega-Marquis, secretary, Independent Sector; president and CEO, Marguerite Casey Foundation

11:30 a.m.–1:00 p.m.

NGen Keynote Lunch

Please see page 15 for more details.

Wednesday, November 4, 11:30 a.m.–1:00 p.m.

(Location: Cartier Ballroom)

Special Luncheon Plenary for Michigan Grantmakers: Achieving Higher Impact in the “New” Opportunities in Michigan’s New Economy

Are Michigan grantmakers betting on the future or relying on the comfort and safety of the past? As a growth business, how can philanthropy play multiple roles as a driver for a prosperous future for our state? While recognizing the collaborative work already being done by grantmakers around Michigan, our speakers will make the case for managing risk by rigorously taking on questions related to strategy, capital, and talent as we seek to achieve “higher impact” through our grantmaking in these challenging times.

All CMF members and Michigan grantmakers are eligible to attend this session.

Speakers:

Soji Adelaja, director, Land Policy Institute, Michigan State University;
 Tom Tierney, chairman and cofounder, The Bridgespan Group



Adelaja



Tierney

Wednesday, November 4, 1:30–4:00 p.m.

(Location: Columbus Room)

Opening Plenary

Sponsored by the John S. and James L. Knight Foundation

Welcome to Detroit:

The Honorable Dave Bing, mayor, City of Detroit

Opening remarks:

Melonie Colaianne, chair, Council of Michigan Foundations; president, MASCO Corporation Foundation

Debbie Dingell, co-chair, Annual Conference Host Committee

Mariam Noland, co-chair, Annual Conference Host Committee; IS board member; president, Community Foundation for Southeast Michigan

Stephen Heintz, IS board member; president, Rockefeller Brothers Fund

Navigating Change Together

A leading voice in the Obama administration will open the conference with insights on how government and nonprofits can work together in new ways to respond to the challenges facing communities across the country.

Featured Speaker:

Melody Barnes, domestic policy adviser and director, Domestic Policy Council, The White House

Moderator:

Luis Ubiñas, president, Ford Foundation

The session continues with an array of leaders who offer diverse perspectives, experiences, and backgrounds. To address the profusion of unprecedented issues, groups of three speakers will examine the current nonprofit landscape and suggest creative routes forward, focusing on key trends and opportunities that will define the next decade.

Speakers:

Aaron Dworkin, president, Sphinx Organization

Brian Gallagher, president and CEO, United Way Worldwide

Benjamin Todd Jealous, president and CEO, NAACP

Gail McGovern, president and CEO, American Red Cross

Margaret McKenna, president, Wal-Mart Foundation

Janet Murguía, IS board member; president and CEO, National Council of La Raza

Michelle Nunn, chief executive officer, Points of Light Institute

Sean Parker, chairman, Causes on Facebook; managing partner, Founders Fund

Jim Wallis, Jr., president and CEO, Sojourners

Moderator:

Jim Canales, president and CEO, The James Irvine Foundation



Mayor Bing



Barnes



Ubiñas



Dworkin



Gallagher



Jealous



McGovern



McKenna



Murguía



Nunn



Parker



Wallis



Canales

4:30–6:00 p.m.
BREAKOUT SESSIONS

By 2020, Nonprofits' Use of Technology Has Transformed Society

(Location: Ontario Hall–West)

Format: FutureLab

FutureLabs are designed to help nonprofits and foundations chart a course to increase dramatically our impact by 2020.

How do we get here? The nonprofit and philanthropic community has put communications technology to work for the public good. Successful examples of technology-based strategies for inclusive, collaborative problem-solving across old barriers of geography and specialization appear widely. Technology has improved countless lives, especially in low-income communities, and has been deployed to facilitate real-time transparency in all sectors. These successes were fueled by the nonprofit community's commitment to educating itself and its constituents about the potential of technology while increasing investment and innovation in technology that serves the public good.

Sponsored by the John S. and James L. Knight Foundation

Moderator:

Byron Auguste, board chair, Hope Street Group; director of social sector, McKinsey & Company



Census 2010: Can We Get the Count Right?

(Location: Ambassador Salon 3)

Format: InsightXChange

What do nonprofits and foundations need to do now to prepare for the serious changes the Census could bring to the allocation of congressional seats, re-districting efforts, and government funding decisions? The next ten-year national census, which kicks off in March 2010, will take place in an era of enormous concerns about government privacy protections and fears about its implications for undocumented immigrants. This session explores what the 2010 Census will mean for nonprofits and foundations and how we can all prepare for the challenges ahead.

Sponsored by Iles Group at Merrill Lynch

Speakers:

Karen McGill Lawson, president, Leadership Conference on Civil Rights
Sam Singh, senior policy consultant, Public Policy Associates
Arturo Vargas, IS board member; executive director, National Association of Latino Elected and Appointed Officials Educational Fund

Moderator:

Ralph Everett, IS board member; president and CEO, Joint Center for Political and Economic Studies

Community Foundations' Leadership Agenda: Now or Never

(Location: Marquette Room)

With grant budgets shrinking, a community foundation's leadership agenda is now more important than ever. This session will use Capital Region Community Foundation's "Birth to Work University in Community" initiative as a framework to discuss how community foundations can foster partnerships and collaborations, and engage other funders around priority issues in their communities. The focus will be on leveraging existing community assets to make systemic change.

Speakers:

Robert Brown, associate director for community engagement, Michigan State University
Hiram Fitzgerald, associate provost and distinguished professor, Michigan State University
Bradley Patterson, vice president of programs, Capital Region Community Foundation

Family Foundations: Doing More with Less

(Location: Nicolet Room)

Foundation assets on average are down 30 percent, and most family foundations have no paid staff. Mission investing, technical assistance, volunteering, and partnering with other funders are all promising ways that family foundations creatively stretch their resources and increase not only the impact of, but also the enjoyment from, their grantmaking. Come hear their stories.

Speakers:

Thomas Cook, CMF board member; executive director, Cook Family Foundation
 Phillip Fisher, trustee, Max M. and Marjorie S. Fisher Foundation
 Sheri Reid Grant, executive director, Reid Family Foundation
 Karen Wilson, president, Karen Colina Wilson Foundation

Moderator:

Doug Bitonti Stewart, executive director, Max M. and Marjorie S. Fisher Foundation

Information As a Core Community Need

(Location: Richard Room)

This session will focus on the seismic changes in the news and information available to communities, equally large shifts in civic participation, and an initiative to support community foundation leadership in addressing information as a core community need.

Speakers:

Laurie Cirivello, executive director, Grand Rapids Community Media Center
 Roberta King, vice president of public relations and marketing, Grand Rapids Community Foundation
 Jan Schaffer, executive director, J-Lab: The Institute for Interactive Journalism

Moderator:

Trabian Shorters, vice president of communities programs, John S. and James L. Knight Foundation

Reinventing Foundations: Shifting Practices for Maximum Impact

(Location: Ambassador Salon 1)

Format: InsightXChange

Across the country, foundations are adapting their practices and priorities to achieve maximum impact in this changing environment. Discuss how foundations are using philanthropy as a catalyst for innovative and systemic solutions in areas such as community investment, social innovation, and fostering entrepreneurialism.

Speakers:

Carol Goss, CMF board member; president and CEO, Skillman Foundation
 Alberto Ibarguen, president and CEO, John S. and James L. Knight Foundation
 Bradford Smith, president, The Foundation Center
 Sandra Vargas, president and CEO, The Minneapolis Foundation

Moderator:

Steve Gunderson, president and CEO, Council on Foundations



4:30–6:00 p.m.

BREAKOUT SESSIONS (CONTINUED)

What Works: Assessing and Achieving Impact

(Location: Ambassador Salon 2)

Format: IdeaZLab

Join a wide-ranging conversation on how individual organizations, and our community as a whole, can focus on activities that have the greatest impact. While financial pressures are forcing organizations of every size and mission to re-evaluate allocation of limited time and resources, donors and other stakeholders are increasingly looking to nonprofits and foundations for reliable information on the impact of their work. This session will examine how organizations assess what’s working—and what’s not—and adapt their work accordingly.

Discussion Leaders:

- Anan Ameri, director, Arab American National Museum
- Phil Buchanan, president, The Center for Effective Philanthropy
- Laura Callanan, philanthropy practice expert, McKinsey & Company
- Daniel Cardinali, president, Communities In Schools
- James Firman, president and CEO, The National Council on Aging
- Inca Mohamed, executive director, Management Assistance Group
- Heather Peeler, managing director, Community Wealth Ventures
- Andreas Rickert, director, Bertelsmann Foundation

Facilitator:

- Jacob Harold, program officer, The William and Flora Hewlett Foundation

CEO Track: Conversation with Diana Aviv

(Location: LaSalle A)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Join IS president and CEO Diana Aviv for a wide-ranging discussion about current and future conditions in the nonprofit and philanthropic community, including our role in shaping a better future.

Speaker:

Diana Aviv, president and CEO, Independent Sector

Interviewer:

Brian Gallagher, chair, Independent Sector; president and CEO, United Way Worldwide

CEO Track: The Evolving Role of Nonprofit Boards

(Location: LaSalle B)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Are the fundamental responsibilities and composition of nonprofit boards evolving in response to changing times? As expectations of an organization increase, its board must adapt its work to current conditions. The demographic and economic shifts in American society suggest that members of a board should also look different and provide new skills and knowledge to a 21st century organization. Take part in a wide-ranging discussion that examines these areas.

Speakers:

- Neel Hajra, president and CEO, Nonprofit Enterprise at Work
- John Morning, trustee, Charles Stewart Mott Foundation
- Lorie Slutsky, IS board member; president, The New York Community Trust

Moderator:

Linda Crompton, president and CEO, BoardSource

Wednesday, November 4, 7:00–9:00 p.m.

Host Reception at the Detroit Institute of Arts

Reconnect with colleagues and meet new ones while exploring the Detroit Institute of Arts, America’s fifth largest museum of fine arts. Within the DIA’s newly renovated and expanded building, attendees will enjoy galleries featuring American and Impressionist art, a photography exhibit by Richard Avedon, the elegant Great Hall, and the Detroit Industry fresco cycle by Mexican muralist Diego Rivera, the finest example of his work in the United States.

We are pleased to present a special performance by the Detroit Symphony Orchestra, sponsored by the John S. and James L. Knight Foundation.

Buses begin leaving from the hotel Motor Coach Lobby at 6:30 p.m. Please see page 9 for more details.



7:15–8:30 a.m.

Breakfast Buffet

(Location: Renaissance Foyer)

7:45–8:30 a.m.

IS Annual Members’ Meeting and Breakfast

(Location: Columbus Room)

Help set the direction of the Independent Sector coalition for the coming year, vote on board members, and hear updates on important IS activities.

The agenda will be distributed at the meeting.

CMF Annual Members’ Meeting and Breakfast

(Location: Cabot Room)

CMF members are invited to gather to elect new CMF trustees and hear reports on finances and accomplishments.

Thursday, November 5, 8:30–9:15 a.m.

(Location: Columbus Room)

Plenary Session:

**Conversation with a Sector Leader:
Jeff Raikes, CEO of the Bill & Melinda
Gates Foundation**

How does the chief executive of the world’s largest philanthropy view the rapidly changing landscape of the nonprofit sector? Since becoming head of the Bill & Melinda Gates Foundation, Mr. Raikes has stressed strong partnerships, ambitious goals, and a commitment to impact as keys to transforming the lives of underserved populations across the globe. In this captivating session, Kelvin Taketa of the Hawai’i Community Foundation, will delve into the passion and commitment that drives this accomplished leader, who has dedicated his life to using innovation to change the lives of others.

Speaker:

Jeff Raikes, chief executive officer, Bill & Melinda Gates Foundation

Interviewer:

Kelvin Taketa, IS board member; president and CEO, Hawai’i Community Foundation



Raikes



Taketa

9:45–11:15 a.m.

BREAKOUT SESSIONS

**Avoiding Family Foundation Missteps:
Policies and Tools for Good Governance**

(Location: Marquette Room)

This session features the outstanding “CMF Family Foundation Players,” a five person acting troupe composed of trustees from different family foundations, who were a big hit at the 2008 annual conference. Missteps of the fictional Jordan Family Foundation at its annual board meeting will help attendees learn the policies to practice and the tools to use for good governance.

Speaker:

Marguerite Griffin, senior vice president and national director of philanthropic services, Northern Trust Bank

**By 2020, Nonprofits Facilitate Broad Civic
Engagement that Fuels Our Democracy**

(Location: Ontario Hall–West)

Format: FutureLab

FutureLabs are designed to help nonprofits and foundations chart a course to increase dramatically our impact by 2020.

How do we get here? Civic engagement, volunteering, community problem solving, voter mobilization, and political participation have increased exponentially in the last decade. The result is an active citizenry regularly involved in public debate on issues of local, national, and international concern, pushing government at all levels to become more proactive in seeking and responding to community input. Driving much of this progress have been nonprofits and foundations, which have coordinated and strengthened formerly disparate civic engagement efforts, and significantly broadened the scope and reach of civic engagement activities.

Sponsored by the John S. and James L. Knight Foundation

Moderator:

Miles Rapoport, president, Demos: A Network for Ideas and Action

9:45–11:15 a.m.
BREAKOUT SESSIONS (CONTINUED)

**Corporate Philanthropy:
 Evolution and Transformation**

(Location: Ambassador Salon 3)

Format: InsightXChange

Even before the global economic crisis diminished resources, corporate philanthropy was facing increased pressures to demonstrate social impact. Examine how the business community can move beyond today's economic and political disruptions and support the work of nonprofits in communities around the world. This discussion will also identify exceptional opportunities for collaboration between the private sector and the nonprofit community.

Speakers:

- Richard Brown, vice president, philanthropy, American Express Company
- Evan Hochberg, national director of community involvement, Deloitte & Touche USA, L.L.P.
- Kerry Herlihy Sullivan, president, Bank of America Charitable Foundation
- Dennis White, president and CEO, MetLife Foundation

Moderator:

- Charles Moore, executive director, Committee Encouraging Corporate Philanthropy

Diversity Management and Inclusive Culture as a Vehicle for Creating Excellence in Organizations: From Vision to Action

(Location: Nicolet Room)

This working session will help participants understand how to transform their vision of diversity management and inclusive culture and provide them with tools for creating strategic diversity management practices in their organization. The session is designed around five key stages: reflection, awareness and assessment; strategy building; creating an inclusive culture; building capabilities; and measuring impact.

Speaker:

- Lynn Wooten, clinical associate professor, Stephen M. Ross School of Business, University of Michigan

Moderator:

- Sylvester Jones, program officer, Ruth Mott Foundation

Forging the Nonprofit Community's Policy Priorities for 2010

(Location: Ambassador Salon 2)

Format: IdeaZLab

The legislative and policy decisions Congress and the new administration will make in the year ahead will have a tremendous impact on the work of foundations and nonprofits. Hear perspectives on the key issues facing our community—tax reform, re-defining tax exemption, lobbying rights, the estate tax, charitable giving incentives, nonprofit capacity-building—and help shape the policy priorities for our community.

Sponsored by Iles Group at Merrill Lynch

Discussion Leaders:

- Cecilia Garcia, executive director, Benton Foundation
- Audrey Tayse Haynes, senior vice president and chief government affairs officer, YMCA of the USA
- Chuck Marr, director of federal tax policy, Center on Budget and Policy Priorities
- Drummond Pike, founder and CEO, Tides Center and Tides Foundation
- William Roberts, director of U.S. advocacy, The Atlantic Philanthropies
- Douglas Rutzen, president, International Center for Not-For-Profit Law
- Jay Spector, president and CEO, JEVS

Facilitator:

- Kyle Caldwell, president and CEO, Michigan Nonprofit Association

Improving Urban Food Deserts: Local Agriculture, Food Rescue, and Better Public Policy

(Location: Richard Room)

Hear from a panel of experts who will discuss better public policy for complementary strategies that include the charitable food supply; food rescue; access to fresh, high-nutrition and locally grown food; and food as a public benefit.

Speakers:

- Susan Goodell, executive director, Forgotten Harvest
- Rebecca Salminen Witt, president, Greening of Detroit
- Oran Hesterman, president and CEO, Fair Food Network

Moderator:

- Guy Williams, principal, G.O. Williams & Associates, L.L.C.

Nonprofit Survival Strategies

(Location: Ambassador Salon 1)

Format: PechaKucha

Nonprofits today are facing unprecedented challenges that are forcing them to adapt in order to survive and thrive. Hear practical, thought-provoking ideas for leading and managing during an economic crisis, and engage in deep dialogue about how we can maximize our impact despite the odds.

Discussion Leaders:

Dione Alexander, vice president of the midwest region,
Nonprofit Finance Fund

Toni Heineman, executive director, A Home Within

Stephen Hoffman, president and CEO, Jewish Community
Federation of Cleveland

Jane Smith, executive director, Center for Leadership and
Civic Engagement, Spelman College

Rick Sperling, founder and CEO, Mosaic Youth Theatre
of Detroit

Facilitator:

Bill Strathmann, chief executive officer, Network for Good

CEO Summit: Innovative Leadership, Critical Thinking for Critical Times

(Location: Cadillac Room)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

The turbulent economy is forcing CEOs to find innovative ways to sustain their organizations and deliver powerful results. Often the best path comes not from leading through constriction but by choosing a more expansive way of thinking and acting. Join David Horth, an expert on the confluence of design, creativity, and leadership, to learn how to achieve strategic growth through new methods and explore tools, techniques, and processes for transforming ideas into innovation practice.

Speaker:

David Magellan Horth, senior designer,
Center for Creative Leadership

Moderator:

Gene Cochrane, Jr., president, The Duke Endowment

Thursday, November 5, 11:45 a.m.–1:30 p.m. Luncheon Plenary

(Location: Columbus Room)

Remarks:

Frederick Shell, president, DTE Energy Foundation

Fashioning Our Future Together

What can foundations and nonprofits do today to prepare for a vibrant tomorrow?

The nonprofit community stands in the middle of extraordinary times. Our organizations and the people we serve are buffeted by the most troubled economy in our lifetimes, yet appearing during this storm are the dawn of a widespread rededication to service and a shining group of leaders committed to creating permanent change. In her address, Diana Aviv, president and CEO of Independent Sector, will examine how our sector can not just weather the current climate, but use this time to help create the conditions that will produce a society characterized by shared responsibility and greater opportunity for all.

A panel of leaders will then examine the trends and solutions Diana raises.

Sponsored by the DTE Energy Foundation

Panelists:

Ben Hecht, president and CEO, Living Cities
Stephen Heintz, IS board member; president,
Rockefeller Brothers Fund

Wendy Puriefoy, IS board member; president, Public
Education Network

Moderator:

Alberto Ibarguen, president and CEO, John S. and
James L. Knight Foundation



Aviv



Hecht



Heintz



Puriefoy



Ibarguen

2:00–3:30 p.m.
BREAKOUT SESSIONS

**How Can Volunteers Help Your Organization?
Or Is That The Wrong Question?**

(Location: Ambassador Salon 1)

Format: PechaKucha

At a time when nonprofits are struggling with limited resources, the economic crisis has flooded the market with potential volunteers. The Serve America Act has also created an increased momentum for volunteerism. How can we ensure that this wave of volunteerism and the enthusiasm it generates lead to greater impact for organizations and their mission areas?

Discussion Leaders:

- Greg Baldwin, president, VolunteerMatch
- AnnMaura Connolly, chief external affairs officer and senior vice president, City Year
- Brian Gallagher, chair, Independent Sector; president and CEO, United Way Worldwide
- Ketny Jean-Francois, board co-chair, Community Voices Heard
- Lester Strong, chief executive officer, Experience Corps
- Sondra Youdelman, executive director, Community Voices Heard

Facilitator:

- Michael Balaoing, senior vice president of programs, Entertainment Industry Foundation

**CEO Track: Organizational
and Executive Compensation**

(Location: LaSalle B)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Creating an effective compensation system is difficult even when times are good—and it's even harder now. Learn how to develop comprehensive compensation systems that work for the organization, your executives, and your staff's career development.

Speakers:

- Charles Quatt, president, Quatt Associates
- Sally Sterling, consultant, Spencer Stuart

Moderator:

- Susan Berresford, IS board member

**The Nonprofit Community
and Health Care Reform**

(Location: Ambassador Salon 3)

Format: InsightXChange

Many proposals have been advanced to fix our broken health care system, and Congress is moving ahead to implement changes. What will these changes mean for the work of nonprofits and foundations as employers, as providers of health and human services, or as advocates for disease prevention and improved health? Join this discussion for an update on the latest on health care reform and the work that lies ahead.

Sponsored by Iles Group at Merrill Lynch

Speakers:

- Juan Figueroa, president, Universal Health Care Foundation of Connecticut
- John Rother, executive vice president of policy, AARP
- John Seffrin, chief executive officer, American Cancer Society

Moderator:

- Ralph Neas, chief executive officer, The National Coalition on Health Care

**CEO Track: Organizational Restructuring
in Turbulent Times**

(Location: LaSalle A)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Financial realities are forcing CEOs to consider restructuring their organizations in order to survive. This session looks at the key issues to consider in making such decisions, what can be done to mitigate undesirable effects of lay-offs, mergers, closures, and whether there are less drastic alternatives.

Speakers:

- Sterling Speirn, CMF board member; president and CEO, W.K. Kellogg Foundation
- Jeanne Bell, executive director, CompassPoint Nonprofit Services

Moderator:

- Ralph Everett, IS board member; president and CEO, Joint Center for Political and Economic Studies

2:00–5:00 p.m.
BREAKOUT SESSION

By 2020, Nonprofits Lead the Way on Inclusion

(Location: Ontario Hall–West)

Format: FutureLab

FutureLabs are designed to help nonprofits and foundations chart a course to increase dramatically our impact by 2020.

How do we get here? Nonprofits have activated new and existing networks to ensure that staff, board members, volunteers, and donors represent the rich diversity of our country and world. Expanded leadership pipelines have been key to this new culture of inclusion. In addition, organizations are working together in innovative ways and benefitting from breaking down barriers such as geography and mission-area silos. For example, U.S. nonprofits are better integrated with the international NGO community and coordination has increased between faith-based and secular groups. By fundamentally rebuilding the way we recruit individuals and connect organizations, the nonprofit community has powerfully increased our individual and collective impact, and become a model for the nation as a whole.

Sponsored by the John S. and James L. Knight Foundation

Moderator:

Kyle Caldwell, president and CEO,
Michigan Nonprofit Association



2:00–5:30 p.m.
WORKSHOPS

Advanced Practice Workshop with Jan Jaffe

(Location: Nicolet Room)

Nonprofit and foundation leaders, whether seasoned or new to their positions, often find themselves in challenging situations with high stakes and no easy answers. This advanced practice workshop will help you tune up to: (1) Recognize soft challenges, situations that have no technical solutions and leave even experienced practitioners feeling confused or ineffective; (2) Draw on a new framework for effective personal strategy—using the linked concepts of role, self, and system; and (3) Think and work like a natural by using a framework that makes the tacit strategies of highly effective leaders explicit and accessible.

Speaker:

Jan Jaffe, project leader, GrantCraft

Better Presentations, Stronger Leadership

(Location: Monet Room)

Great leaders recognize how important powerful communication is to inspiring change. Join Bill Hoogterp, speaking coach to top executives around the world, for an interactive, entertaining training session that will strengthen your communication and presentation skills. Dramatically improve presentations and meetings by learning how the brain processes information and how to engage and “listen to” an audience. Participants will practice concrete techniques individually and in pairs and teams, receiving feedback through video and group evaluation.

Speaker:

Bill Hoogterp, chief executive officer, The LEAGUE

Advanced registration required. Please visit the registration counter. IS/CMF Members: \$100; Non-members: \$120

2:00–5:30 p.m.

SITE SESSIONS

Pre-registration required. Please visit the registration counter to sign. Transportation will depart from the Marriott Renaissance Hotel Motor Lobby.

Creativity—A Corridor for Integrating New and Old

(Location Offsite: University Cultural Center, Arts League of MI, Detroit Economic Growth, College for Creative Studies, N’Namdi Gallery)

Discover Detroit’s creative corridor with multiple stops at cultural institutions, art districts and the new design school at the College for Creative Studies. Engage public officials, nonprofit leaders, and private developers on their experiences in developing public/private partnerships to build out the corridor. A panel discussion with CEOs of Detroit’s leading cultural institutions will wrap up the tour. During the tour, participants will hear from the following chief executives: Sue Mosey, University Cultural Center; Oliver Ragsdale, Arts League of Michigan; George Jackson, Detroit Economic Growth; Rick Rogers, College for Creative Studies; and George R. N’Namdi, N’Namdi Gallery.

Limited to 50 participants—pre-registration required

Speakers:

- Graham Beal, chief executive officer, The Detroit Institute of Arts
- Bob Bury, executive director and CEO, Detroit Historical Society
- Maud Lyon, chief executive officer, Cultural Alliance of Southeastern Michigan
- Juanita Moore, president and CEO, C.H. Wright Museum of African American History
- Kevin Prihod, chief executive officer, Detroit Science Center

Moderator:

- Laura Trudeau, program director, The Kresge Foundation

Immigration—Everybody Counts in our Revitalization

(Location Offsite: Freedom House)

This session will discuss the burgeoning philanthropic interest in the link between immigration and city-wide revitalization and explore how philanthropy can play a catalytic role in starting the engine of private investment that is intimately connected to the welcoming of immigrants. A tour of either the Southwest or Hamtramck communities will be included.

Limited to 50 participants—pre-registration required.

Speakers:

- Jonathan Bowles, director, Center for an Urban Future
- Sam Singh, senior policy consultant, Public Policy Associates
- Rosemary Smith, chief executive officer, The Kitchener and Waterloo Community Foundation
- Steve Tobocman, co-director, Michigan Foreclosure Task Force, Community Economic Development Association of Michigan

Moderator:

- Edward Egnatios, senior program officer for good neighborhoods, Skillman Foundation

The New (Green) Economy

(Location Offsite: NextEnergy)

The alignment of emerging industries, alternative and efficient energy opportunities, and the state’s natural resources and manufacturing infrastructure make Michigan a prime location for a new, green economy. Business opportunities and job creation in fields across the energy spectrum—including smart grid/smart home efficiencies; nuclear and cleaner coal technologies; and alternative wind, solar, and battery sources—are poised to strengthen a culture of lasting entrepreneurialism in Detroit and Michigan. Join us at NextEnergy, a Detroit TechTown center of alternative energy excellence and Michigan’s leading alternative and renewable energy business incubator and accelerator, to hear from Michigan’s green energy leadership.

Limited to 50 participants—pre-registration required

Speakers:

- Keith Cooley, chief executive officer, NextEnergy
- Lois DeBacker, program director, The Kresge Foundation
- Kate Gordon, vice president for energy policy, Center for American Progress
- Steven Kurmas, president, Detroit Edison

Moderator:

- David Egner, CMF board member; president and CEO, Hudson-Webber Foundation

Navigating the Economic Recovery

(Location Offsite: Federal Reserve Bank)

This session will tour the Federal Reserve building in Detroit, which was the first federal building constructed after September 11. Following the tour the local Federal Reserve economist will provide insight into the latest federal policies and how they might affect the economy. Two concurrent investment sessions will take place during the final part of this visit.

Limited to 100 participants—pre-registration required.

Speaker:

Samuel Kahan, senior economist, Federal Reserve Bank of Chicago's Detroit Branch

Moderator:

Stephen Nedwicki, relationship manager for foundations, Comerica Bank

Topic 1: Navigating the Financial Crisis 2009

This session will focus on the impact of the 2008 recession. It will address implications of the Investment Policy Statement on current asset allocation targets and the effects on spending policies. The session will offer insights to investment committee members on risk-return metrics and their application in today's financial markets.

Speakers:

Alan Ochalek, vice president,
Comerica Asset Management

Ashok Rajan, director of investment management
and guidance, Merrill Lynch

Moderator:

Scott Schropp, vice president of investments,
Illes Family Conservation Scholarship Fund

Topic 2: Economic Recovery—Are We There Yet?

The recession of 2008-2009 has taken a tremendous toll on the local, national, and global economies. Are we poised for a recovery or does our trip through these difficult times still have a ways to go? Join leading economists in discussing the road map to recovery for the state, the country, and the world.

Speakers:

Dana Johnson, chief economist, Comerica Bank
Mark Perry, professor of economics and finance,
University of Michigan School of Management

Moderator:

Jonathan Hohn, assistant vice president, Citizens Banking
Corporation Charitable Foundation

Reclaiming Community Assets

(Location Offsite: Rosedale Baptist Church, Brightmoor Community)

Reclaiming vacant and abandoned land is integral to the success of community development initiatives all across Detroit. Vacant and abandoned property could be the city's biggest asset, if it is reclaimed, redeveloped and returned to productive use. We'll visit the Brightmoor Community to learn how it has created a land-use plan to respond to the staggering amount of vacant land.

Limited to 50 participants—pre-registration required

Speakers:

Al Bogdan, principal and owner, AAB Development
Strategies, LLC

John O'Brien, executive director, Northwest Detroit
Neighborhood Development

Dan Pitera, executive director, Detroit Collaborative
Design Center

Jerome Warfield, pastor and chair, Mount Vernon
Missionary Baptist Church

Moderator:

Tonya Allen, vice president of programs,
Skillman Foundation

Water is the New Oil

(Location Offsite: Dossin Great Lakes Museum)

Globally, water supplies are strained by pollution and population growth and threatened by climate change. The Great Lakes contain 20 percent of the world's fresh surface water. Learn how existing and proposed Great Lakes water policies respond to issues including climate change, green energy, water quality, and water rights. Are these policies adequate? What are the political, economic and social implications? How can the policy-making process be improved? Join us at the Dossin Great Lakes Museum (on Belle Isle Park, a Frederick Law Olmstead-designed island park in the Detroit River and the largest island park in the U.S.) for this fascinating and timely discussion.

Limited to 50 participants—pre-registration required

Speakers:

James Clift, policy director, Michigan
Environmental Council

Tim Eder, executive director,
Great Lakes Commission

Maureen Taylor, chair, Michigan Welfare
Rights Organization

Moderator:

Jodee Fishman Raines, vice president of programs,
Erb Family Foundation

4:00–5:30 p.m.
BREAKOUT SESSIONS

Advocacy, Coalitions, Communications: What Does It Take to Change Policies and Practices?

(Location: Ambassador Salon 1)

Format: PechaKucha

What are the most effective approaches for changing the behavior of individuals and communities? When does change result from changing public opinions, and when does it require changing public policy? Explore the power of new approaches to communications, coalition building, and advocacy that are shifting the ways foundations and nonprofits are creating positive changes in behaviors and practices.

Sponsored by Iles Group at Merrill Lynch

Discussion Leaders:

Sharlonda Buckman, executive director,
Detroit Parent Network

Ann Christiano, senior communications officer,
Robert Wood Johnson Foundation

Maya Enista, chief executive officer, Mobilize.org

André Oliver, consultant, Cause Communications

Nina Ozlu Tunceli, chief counsel of government and public affairs, Americans for the Arts

Facilitator:

Marta Tellado, vice president for communications,
Ford Foundation

CEO Track: Nonprofit CEO Renewal

(Location: LaSalle A, B)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Nonprofit CEOs face mounting challenges, both personal and professional. Coping with the pressures that accompany the making of tough decisions is crucial if you are to avoid burn-out while managing your staff, clients, and organization's future. Explore stress management techniques to help you cope with the responsibilities that come with being a CEO.

Speaker:

Sandra Finkel, manager of stress management services and executive health program, University of Michigan Cardiovascular Center

Moderator:

Ruth Wooden, IS board member; president,
Public Agenda

Leadership that Cultivates Innovation

(Location: Ambassador Salon 2)

Format: InsightXChange

A culture of innovation can help maximize organizational impact—but creating that atmosphere is a challenge. This session will examine how, at a time of great uncertainty, nonprofit leaders can encourage and manage innovation within their organizations in order to overcome challenges and maximize impact.

Speakers:

Michele Jolin, senior advisor for social innovation,

The Domestic Policy Council, White House
Trabian Shorters, vice president of communities program,

John S. and James L. Knight Foundation

Kim Syman, managing partner and director of the Action
Tank, New Profit

Lynne Vaughan, senior vice president and chief innovation
officer, YMCA of the USA

Moderator:

Edward Henry, president and CEO, Doris Duke
Charitable Foundation

Working Effectively with the Administration

(Location: Ambassador Salon 3)

Format: InsightXChange

The Obama administration has implemented many changes in the ways the executive branch interacts with private philanthropy and nonprofits. What do these changes really mean for our community and the people we serve? How can we best ensure that all parts of our community are able to share their ideas and concerns with the administration? Can we overcome the inherent tensions among our competing political and social agendas to work most effectively with the administration?

Sponsored by Iles Group at Merrill Lynch

Speakers:

Eric Rodriguez, vice president, Office of Research,
Advocacy and Legislation, National Council of La Raza,

Rev. Larry Snyder, IS board member; president,
Catholic Charities USA

Luz Vega-Marquis, secretary, Independent Sector; president
and CEO, Marguerite Casey Foundation

Moderator:

Ellen Alberding, IS board member; president,
The Joyce Foundation

5:30–7:00 p.m.

Wine and Cheese Reception

(Location: Ontario Exhibit Hall–East)

This must-attend networking event provides light hors d’oeuvres and the opportunity to make new connections. It will highlight ideas that have emerged from an online conversation hosted by the firm Imaginatik about how the sector can increase its impact; attendees can try out this tool by sharing their opinions on key ideas for the future of the sector.

9:00–11:00 p.m.

After Hours Social Event

(Location: Cabot Room)

Meeting, mingling and Motown! “Get Ready” for a musically-inspired after hours event that invites you to relax, unwind and reconnect with colleagues.

Thursday, November 5

7:00–9:00 p.m.

(Location: Columbus Room)

John W. Gardner Leadership Dinner

How are the leaders of the charitable community demonstrating impact?

This evening celebrates exceptional nonprofit leaders and recognizes the remarkable achievements of John W. Gardner, Independent Sector’s founding chair and a champion in the areas of philanthropy, education, and politics. Independent Sector presents the award each year to an individual whose leadership in or with the nonprofit community has been transformative and who has mobilized and unified people, institutions, and causes that improve people’s lives.

Independent Sector will honor Geoffrey Canada, president and CEO of Harlem Children’s Zone, with the 2009 John W. Gardner Leadership Award in recognition of his groundbreaking success in helping children and families in Central Harlem to break the cycle of generational poverty.

The dinner will also feature the presentation of the American Express Building Leadership Award to Community Voices Heard, which empowers low-income people in New York City and state to advocate for public policy changes that improve their lives.

Entertainment provided by the Mosaic Youth Theatre of Detroit

Presenters:

Marguerite Kondracke, IS board member; president and CEO, America’s Promise Alliance
 Rev. Larry Snyder, IS board member; president, Catholic Charities USA

Emcee:

Debbie Dingell, co-chair, Annual Conference Host Committee

Invocation:

Imam Mohammad Mardini, American Muslim Center

Remarks:

Richard Brown, vice president of philanthropy, American Express Company



8:00–9:30 a.m.

Continental Breakfast

(8:00–9:00 a.m. located in Ontario Hall East;
9:00–9:30 a.m. located in the Renaissance Foyer)

8:00–9:00 a.m.

Hot Topic Round Table Discussions

(Location Ontario Exhibit Hall–East)

Join a roundtable discussion organized by one of your colleagues on a key issue facing the sector. Topics to date include:

Are We Over-Thinking Board Governance? Jonathan Schick, president, GOAL Consulting and author, *The Nonprofit Secret*

Corporate Representation on Nonprofit Boards

Cultural Data—The Value of the Arts

EngAGEMENT Initiative: A New Look on Aging

Going to Scale—Ways to Work

International Solutions to Organizational Challenges in Times of Crisis—Scott Beale, executive director, Atlas Service Corps

K-12 Education and all that Stimulus Money

Michigan Grantmakers for Women & Girls—Economic Security Campaign

Mission-Focused Management in Tough Economic Times, Wm. Patrick Nichols, president, Transition Leadership International

Nonprofits Online: How to Win Money and Mobilize People! Michael Smith, vice president of social innovation, Case Foundation; Kari Saratovsky, vice president of social innovation, Case Foundation; Kristin Ivie, program associate of social innovation, Case Foundation

Online Tools to Generate Collaboration and Inspiration—Peter Propp, vice president of marketing, Imaginatik

8:00–9:00 a.m.

BREAKOUT SESSION

Communicating Goals and Strategies for Impact: Nonprofit Effectiveness Advisory Group Meeting

(Location: Brule Room)

How can your organization better articulate how your short-term objectives and recent accomplishments are connected to your long-term goals and strategies for lasting, meaningful impact? Join this meeting of Independent Sector’s Advisory Group on Nonprofit Effectiveness to discuss a new initiative to develop a common language and framework for organizations seeking to communicate what impact they seek to achieve, their strategies for achieving it, and how they assess their progress along the way. The meeting is open to all conference attendees.

Discussion Leader:

James Firman, chair, Independent Sector Advisory Group on Nonprofit Effectiveness; president and CEO, The National Council on Aging

8:00–9:00 a.m.

NGen Closing Breakfast

Please see page 15 for more details.



9:30–11:00 a.m. BREAKOUT SESSIONS

The Bigger Picture

(Location: Ontario Hall–West)

Format: FutureLab

FutureLabs are designed to help nonprofits and foundations chart a course to increase dramatically our impact by 2020.

What do we want society to look like in 2020 and what will it take to get there? In this session, several thought leaders will offer specific goals for society in 2020 and identify what the nonprofit and philanthropic community will need to do to get us there. Key to this discussion will be identifying our sector's current blind spots and emerging opportunities—and ways to address them.

Sponsored by the John S. and James L. Knight Foundation

Moderator:

Jeffrey Bradach, managing partner and co-founder,
The Bridgespan Group

Caring to Change—Enabling Enduring Social Improvements

(Location: Marquette Room)

How can today's foundations, which account for less than three percent of the nonprofit sector's annual revenue, have the greatest impact? How do we define our relationships with other institutions that share our values? Building on the results of more than 100 interviews, join colleagues in an ongoing conversation about the continuous search for strategies that will help foundations better promote the common good.

Speakers:

Mark Rosenman, director, Caring to Change
Tessie Guillermo, president and CEO, ZeroDivide
Karen Zelermyer, Joint Affinity Group
Jee Kim, program director, Surdna Foundation

Moderator:

Nicholas Deychakiwsky, program officer,
Charles Stewart Mott Foundation

Corporate Philanthropy Programming Best Practices

(Location: Richard Room)

In order to respond to the changing needs of our communities it is especially important for funders to stay connected and support successful programming. This workshop, designed especially for corporate grantmakers, will cover best practices, insights and challenges associated with sustaining strong community initiatives from a dynamic presenter from the Kraft Corporation—a company with philanthropic contributions of \$18.3M for hunger-relief, healthy lifestyles, humanitarian aid, and employee involvement programming.

Speakers:

Nicole Robinson, senior manager of focused giving,
Kraft Corporation

Moderator:

Caroline Chambers, president, Comerica
Charitable Foundation

CEO Track: Conversation with the Gardner Leadership Awardee—Geoffrey Canada

(Location: LaSalle A)

The CEO Track is open to heads of IS and CMF member organizations. Participants must register for each session.

Join a conversation with 2009 Gardner Award recipient Geoffrey Canada and examine the promise of a comprehensive community strategy for poor children.

Speaker:

Geoffrey Canada, president and CEO,
Harlem Children's Zone

Interviewer:

Edward Skloot, chair, IS Annual Conference Program
Committee; IS board member; director, Center
for Strategic Philanthropy and Civil Society, Duke
University

9:30–11:00 a.m.
BREAKOUT SESSIONS (CONTINUED)

Diversity in Nonprofit Leadership: Problems and Solutions

(Location: Ambassador Salon 1)

Format: PechaKucha

Despite our community's stated commitment to diversity, women and people of color are underrepresented at the executive level of nonprofits and foundations. Hear provocative perspectives on the obstacles to diversifying our community's leadership, and consider methods for navigating or demolishing barriers.

Speakers and Discussion Leaders:

Gisselle Acevedo, president and CEO, Para Los Niños
 Susan Taylor Batten, president and CEO, Association of Black Foundation Executives

Aaron Dorfman, executive director, National Committee for Responsive Philanthropy

Jan Masaoka, director and editor-in-chief, Blue Avocado
 Paul Schmitz, chief executive officer, Public Allies

Moderator:

Barbara Arnwine, executive director, Lawyers' Committee for Civil Rights Under Law

Family Foundations: Documenting Your Legacy

(Location: Nicolet Room)

It's important that family foundations permanently capture and document the history, origins and values of their founders. This session will present various methods and tools families can use such as capturing oral histories, creating historical exhibits, establishing a document archive and videotaping interviews of the founders. Attendees also will hear stories and see examples of what several family foundations have done.

Speakers:

Kristine Boll Mestdagh, executive director,
 John A. & Marlene L. Boll Foundation

Heidi Connor, collections manager,
 Edward Lowe Foundation

Kelley Hamilton, vice president of development,
 Detroit Public Television

Moderator:

Daniel Wyant, CMF board member; president and COO, Edward Lowe Foundation

The Road to Economic Recovery: What Do Foundations and Nonprofits Need to Do Now?

(Location: Ambassador Salon 3)

Format: InsightXChange

The federal government has spent billions of dollars to help move our country out of the economic crisis. Where are we seeing signs of success? What gaps remain? This session will examine how nonprofits and foundations have worked with government and independently to advance economic recovery efforts, and how the lessons we have learned can point the way ahead to ensure that recovery reaches all communities.

Sponsored by Iles Group at Merrill Lynch

Speakers:

Joaquin Alvarado, senior vice president for diversity and innovation, Corporation for Public Broadcasting

Ronn Richard, president and CEO,
 The Cleveland Foundation

Geneva Williams, president and CEO,
 City Connect Detroit

Moderator:

Mariam Noland, IS board member; president,
 Community Foundation for Southeast Michigan

Stars, Seals and Beyond: Getting Nonprofit Impact Ratings Right

(Location: Ambassador Salon 2)

Format: InsightXChange

How—beyond simple metrics of financial ratios or program outputs—should nonprofit impact be measured? What is in store for the next generation of charity effectiveness rating systems? With revenues down but expectations up, impact continues to be the watchword of many charities and foundations. Join an insightful conversation as key leaders challenge current rating systems and discuss what is on the horizon for rating nonprofit impact.

Speakers:

Ken Berger, president and CEO, Charity Navigator
 Robert Ottenhoff, president and CEO, GuideStar USA
 Art Taylor, president and CEO, BBB Wise Giving Alliance

Moderator:

Leslie Crutchfield, co-author of *Forces for Good: The Six Practices of High-Impact Nonprofits*, and philanthropic advisor, Arabella Philanthropic Investment Advisors

Friday, November 6

11:30 a.m.–1:30 p.m.

Closing Luncheon Plenary

(Location: Columbus Room)

Strengthening Communities Together

Revitalizing communities devastated by economic and natural disasters will require enormous efforts by every sector of our society. New alliances between government, business, foundations, nonprofits, and neighborhood groups are leading to innovative solutions in communities whose situations vary widely. The conference will close with a look at revitalization efforts in Michigan and a powerful exchange between leaders at the forefront of community renewal throughout the country.

Host:

Rip Rapson, president and CEO, The Kresge Foundation

Speakers:

Andrew Plepler, IS board member; global corporate social responsibility and consumer policy executive, Bank of America

The Honorable Norman Rice, president and CEO, The Seattle Foundation

Shirley Stancato, president and CEO, New Detroit, Inc.

Moderator:

Irene Hirano, president, U.S.–Japan Council

Closing Remarks:

Robert Collier, president and CEO, Council of Michigan Foundations

Debbie Dingell, co-chair, Annual Conference Host Committee

Mariam Noland, co-chair, Annual Conference Host Committee; IS board member; president, Community Foundation for Southeast Michigan



Rapson



Plepler



Rice



Stancato



Hirano