Transforming Philanthropy

OGF Annual Conference
October 27-29, 2008 • Cleveland
Focus your Strategy. Alter the Present. Shape the Future.

FROM THE CONFERENCE CHAIR . . .
As chair of Ohio Grantmakers Forum’s Annual Conference Committee, I invite you to join us in Cleveland on October 27–29.

The conference theme, Transforming Philanthropy, is especially germane in these challenging economic times. In the future, will we be asked to do more with less? What impact will the markets have on our endowments? What changes are taking place in our donor bases? Should we be agents of change? Should we be involved in public policy? We’ll address these and other vital issues in October. Plus, you’ll find ample time for peer networking, skill building, site visits and workshops.

And, as a cheerleader for Cleveland, I hope you’ll explore my beloved city. It offers a wealth of riches and activities, from world class museums, to one of the best theater districts in the nation, to our lovely lakefront.

I look forward to warmly welcoming you to Cleveland this fall.

RONN RICHARD
PRESIDENT AND CEO
THE CLEVELAND FOUNDATION
MONDAY, OCTOBER 27
PRE-CONFERENCE
11:30 a.m. – 1 p.m
• Luncheon: Early Childhood Education & Care Funders

2 – 5 p.m.
• Promoting Universal Design in Recreation

2 – 5 p.m.
• Transforming Mental Health Care

2 – 7 p.m.
• Legacy of Family Philanthropy in University Circle

TUESDAY, OCTOBER 28
8:45 – 10 a.m.
• Breakfast: Michael Lerner

10:30 – 11:45 a.m.
• Economic Forecast: Knight Kiplinger
• Deliberations on Strategic Grantmaking

12:15 – 2 p.m.
• Lunch: Sterling Speirn and Ohio Philanthropy Award

2:30 – 3:45 p.m.
• Defining and Communicating your Brand
• Asset Growth Through Partnerships
• Compensation and Benefits Issues
• The Dynamic Duo: the Board Chair/CEO Relationship
• Exploring Grantmaker/Grantseeker Relationships
• Ohio Issue Briefing: Prisoner Reentry
• Corporate: Pros & Cons of Signature Programs
• SharePoint: Share Experiences

4:15 – 5:30 p.m.
• Investment Strategies in a Turbulent Economy
• Program vs. Operating Support
• Community Foundations: What Keeps You Up at Night?
• Corporate Funders: The New United Way
• Private and Family Foundations: Hot Topics
• Are you ready for the new 990?
• Disaster Planning and Recovery
• Striking a Balance

6:30 – 8:30 p.m.
• Host Event

WEDNESDAY, OCTOBER 29
8 – 9 a.m.
• Breakfast: Annual Meeting

9:30 a.m. – 12 p.m.
• Site Visit: Euclid Avenue Renaissance

9:15 – 10:15 a.m.
• Ohio Issues Forum: Rick Cohen

10:45 a.m. – 12 p.m.
• Health Funders: Fraying of the Safety Net
• Community Foundations: Community Leadership
• Private and Family Foundations: Beyond the Dollars
• Grantmaking Public Charities: Leveraging Resources through Partnerships
• Effective Education Grantmaking
• Drowning in Paperwork

12:30 – 2 p.m.
• Lunch: Perla Ni and Ohio: State of Philanthropy 2008

Session Key
OGF is a Continuing Education Approved Provider for Certified Fund Raising Executives (CFRE). A ★ denotes sessions for which credits are available.

GI General Interest ★ CFRE credit.
PF Public Policy
M Managing Grants
T Trustees
H Health Funders
C Corporate Funders
PF Private/Family
CF Community Fdns
PC Public Charities
HOST EVENT AT THE CORNER ALLEY  
**Tuesday, October 28**  
OGF serves up food and entertainment at the hottest new 4th Street scene, The Corner Alley, the ultimate entertainment experience. With fine dining, a neighborhood pub, outstanding concert and comedy venues and The Corner Alley all on one block, conference attendees can visit a wide array of entertainment options.

2008 OHIO PHILANTHROPY AWARD  
**Tuesday, October 28**  
OGF presents its award recognizing outstanding contributions to organized philanthropy in Ohio.

DINE & DISCOVER  
Make your reservations early in the nearby East 4th Neighborhood (including the renowned Iron Chef restaurant ‘Lola’) for dinner on your own or with colleagues. View all the restaurants online at www.east4thstreet.com.

SITE VISIT: EUCLID AVENUE RENAISSANCE  
**Wednesday, October 29**  
Once considered the city’s premier commercial artery, Euclid Avenue is once again the focus of activity as construction crews busily transform the avenue to attract new businesses and life. Tour the avenue to see how re-development plans are proceeding, how improving transportation will spur economic development and the role funders are playing.

OGF ANNUAL MEETING  
**Wednesday, October 29**  
OGF President George E. Espy provides updates on key initiatives and members elect new trustees.

OHIO LIVING LEGACIES: SHARING THE PASSION AND PROMISE OF PHILANTHROPY  
OGF continues its oral history project at this year’s annual conference as philanthropists share their stories and passion for giving. The conversations take half an hour and are done in pairs; participants receive one copy of their conversation on CD-ROM as well. The Reinberger Foundation is sponsoring this year’s recording activities.
TRANSFORMING PHILANTHROPY
Tuesday, October 28
Michael Lerner, Ph.D., president and founder, Commonweal
This former MacArthur Foundation “Genius” Fellow will re-energize you as he suggests how foundations can transform themselves in light of fast-paced changes. His understanding of the roots of philanthropy and his reflections on its future will set the stage for the rest of your conference experience.

ECONOMIC FORECAST
Tuesday, October 28
Knight Kiplinger, editor-in-chief, The Kiplinger Letter
Don’t miss this chance to hear Knight Kiplinger, one of America’s most respected economic journalists and business forecasters, give his perspective on national economic trends and how they might impact the investment of foundation assets in Ohio.

OLD MISSION, NEW FOCUS
Tuesday, October 28
Sterling Speirn, president and CEO, W.K. Kellogg Foundation
Sterling Speirn took the helm at the W.K. Kellogg Foundation in 2006, leading it through a transformation that resulted in a new statement of their mission and sharpened strategic focus. Speirn will share his insights and experiences on the process and its outcomes.

OHIO ISSUES FORUM: GOVERNMENT OVERSIGHT: TOO MUCH OR NOT ENOUGH?
Wednesday, October 29
Rick Cohen, national correspondent, The Nonprofit Quarterly
The new Form 990 – complete with 16 schedules requesting information – is only one indication of the increased oversight to which the nonprofit sector is subject. A spirited conversation poses the pros and cons of regulation and lets you share your opinions.

THE MESSAGE THAT MOTIVATES
Wednesday, October 29
Perla Ni, founder and CEO, GreatNonprofits
Nonprofit colleagues will join you in hearing Perla Ni, founder and CEO of GreatNonprofits and founder and former publisher of the Stanford Social Innovation Review, talk about how nonprofits can be better marketers and storytellers and how their funders can help.
Monday
October 27
11 a.m. – 7 p.m.
Conference Registration

11:30 a.m. – 7 p.m.
Pre-Conference Sessions

11:30 a.m. – 1 p.m.
Early Childhood Education Update
An update on the work of Ohio’s Early Childhood Cabinet, policy and budget items also provides an opportunity to connect with and learn from colleagues who share a funding interest in early childhood education and care issues. Information on the new Ready Schools Resource Guide for Elementary School Leadership (which will roll out this fall) will be featured followed by discussion on the role of funders in helping align curriculum, learning experiences and teaching strategies between early childhood and kindergarten programs.

Presenters: Alicia Leatherman, director, Early Childhood Cabinet; Sandy Miller, director, Office of Early Learning and School Readiness, Ohio Department of Education
Moderator: Joni Close, senior program officer, Sisters of Charity Foundation of Canton
Sponsor: Sisters of Charity Foundation of Canton
Fee: $50 OGF members; $75 non-members

2 – 5 p.m.
Transforming Mental Health Care
While recent years have seen great strides in mental health care, many barriers still prevent Ohioans from receiving needed help, from access issues to social stigma associated with mental illness. The workshop opens with the Ohio Department of Mental Health’s Director sharing her perspectives on the most pressing challenges facing Ohio’s mental health system and how we can improve care for those struggling with mental illness. Then, drill down into the challenges of three age groups: children and youth, adults and seniors. Roundtable discussions exploring how funders are involved in transforming Ohio’s mental health care system provide further learning.

Presenter: Sandra Stephenson, director, Ohio Department of Mental Health
Panelists: Georgette M. Constantinou, Ph.D., administrative director, pediatric psychiatry and psychology, Akron Children’s Hospital; Tony Dattilo, chief executive officer, Greater Cincinnati Behavioral Health Services; Martha Sajatovic, MD, professor of psychiatry, Case Western Reserve University School of Medicine
Facilitators: Janice Z. Bogner, senior program officer, severe mental illness, The Health Foundation of Greater Cincinnati; Rick Kellar, president, The Margaret Clark Morgan Foundation; Allison Rand, program officer, The Woodruff Foundation
Fee: $40 OGF members; $55 non-members
Legacy of Family Philanthropy in University Circle
Explore the impact family foundations have made at institutions located around University Circle in Cleveland. Beginning with a ‘behind-the-scenes look” at the Western Reserve Historical Society, the tour continues to the Cleveland Institute of Music, the Mandel Center for Nonprofit Organizations at Case Western Reserve University and the Cleveland Botanical Garden. It will conclude with an informal networking reception at the lovely lakefront home of Vikki Broer in Bratenahl, where University Circle, Inc. president Chris Ronayne will discuss the Circle’s new master plan.

Fee: $50 OGF members; $75 non-members
Sponsor: Vikki Broer, trustee, The Weathertop Foundation

Dine & Discover
Join your colleagues for dinner on the town in the nearby East 4th Neighborhood. We’ll provide a list of nearby restaurants.

Tuesday
October 28

8 a.m. – 7 p.m.
Conference Registration
Living Legacies Recordings

8:45 – 10 a.m.
Transforming Philanthropy
The world is undergoing a dramatic transformation, due to: the explosive global growth of foundations and civil society organizations; the entry of massive new wealth from donors with new ideas about social change; the rise of social entrepreneurs whose strategies change markets; the widening gap between rich and poor; and the globalization of economies. How can Ohio philanthropies - small and large, private, community or corporate foundation and giving programs–transform themselves and achieve their goals? Lerner—a MacArthur Foundation “Genius” Fellow—shares his ideas with time for Q&A.

Speaker: Michael Lerner, president and founder, Commonweal; president, Jenifer Altman Foundation and Barbara Smith Fund

10:30 – 11:45 a.m. Sessions
Economic Forecast
You won’t want to miss Knight Kiplinger – one of America’s most respected economic journalists and business forecasters – give his perspective on national economic trends and how they might impact the investment of foundation assets here in Ohio.

Speaker: Knight Kiplinger, editor in chief, The Kiplinger Letter, Kiplinger’s Personal Finance magazine and trustee, Kiplinger Foundation

Smart Philanthropy: Deliberations on Strategic Grantmaking
Undoubtedly one of the most commonly used phrases in philanthropy today, ‘strategic grantmaking’ means different things to different people. This session will explore the how’s and why’s of strategic grantmaking and you will learn how grantmakers can be strategic while remaining responsive to the needs of the nonprofit sector.

Speakers: Aaron Dorfman, executive director, National Committee for Responsive Philanthropy; Christine A.W. Doby, program officer, Charles Stewart Mott Foundation

Moderator: Gordon Wean, trustee, The Raymond John Wean Foundation

12:15 – 2 p.m. Lunch
Old Mission, New Focus
followed by Ohio Philanthropy Award Presentation
Sterling Speirn took the helm at the W.K. Kellogg Foundation in 2006 and has since led the foundation through its own transformation, resulting in a new statement of their mission and sharpened strategic focus. Speirn will share his experiences and insights on the process and outcomes. Following his discussion OGF will present its fifth annual Ohio Philanthropy Award.

Speaker: Sterling Speirn, president and CEO, W.K. Kellogg Foundation

Sponsor: The Cleveland Foundation

2:30 – 3:45 p.m. Sessions
Defining and Communicating Your Brand
Branding is an essential component of any communications plan. Don’t miss this chance to learn what branding is, why it’s important and how to create a branding portfolio without breaking the bank – all from a panel of communications experts. You’ll also have a chance to discuss important issues such as how to know whether to change
Learning Sessions

**Tuesday October 28**

Your brand and how to work with a branding firm.

**Speakers:** Beth Maiden, communications officer, Community Foundation of Lorain County; Thomas Gibbons, president, Prosum Communications; Kenneth Kovach, president, The Kovach Company

**Moderator:** Edward M. Stevens, president, Stevens Baron Communications, Inc.

---

**Asset Growth through Partnerships**

Learn how foundations can improve customer service through the use of intermediaries and partnerships and grow assets at the same time. Using its experience as a case study, The Dayton Foundation will explain its approach to partnering with private foundations, nonprofit organizations and the advisor community. Participants will also see how the foundation uses its website to attract donors, accept gifts and make grants.

**Speakers:** Michael M. Parks, president, The Dayton Foundation; Angela Clements, Senior Development Officer, The Dayton Foundation

**Moderator:** Yvonne Whitaker, program director, The Fred and Alice Wallace Charitable Memorial Foundation

---

**Compensation and Benefits Issues for Small- and Medium-Sized Foundations**

Designed to help foundations without a dedicated HR staff person, this session will increase your understanding of the basics of compensation and benefits, specifically as they relate to small- and medium-sized foundations. With an emphasis on legal compliance, you’ll learn about potential compensation and benefits approaches, health and welfare benefits, the Family and Medical Leave Act and other important issues. And, you’ll get helpful take-home materials.

**Speaker:** Patti Flauto, senior human resources consultant, ERC Services, Inc.

**Moderator:** Kathleen L. Stecky, director of human resources, The Cleveland Foundation

---

**The Dynamic Duo: the Board Chair/CEO Relationship**

A strong board chair/CEO team can successfully tackle what might otherwise be formidable challenges, such as succession planning, stakeholder relations and demonstrating community impact. Learn from a nationally-known expert about the evolving roles and responsibilities of the foundation CEO and board chair. Two board chair/CEO pairs share practical insights into navigating sticky situations and working together to achieve their missions.

**Speakers:** Sandra Kiely Kolb, board chair, and Denise San Antonio Zeman, president & CEO, Saint Luke’s Foundation; Jane Norton, chair, and Brian R. Frederick, president/CEO, The Community Foundation of Lorain County

**Moderator:** Judith Millesen, faculty fellow, Voinovich School, Ohio University, and board member, The Athens Foundation

---

**Exploring Grantmaker/Grantseeker Relationships**

Developing relationships with grantees is a critical skill for grantmakers and communication can make or break these relationships. Discuss key ingredients of successful grantmaker/grantseeker relationships with a nonprofit advocate and a seasoned grantmaker as they help build your skills during this interactive session.

**Speakers:** Aaron Dorfman, executive director, National Committee for Responsive Philanthropy; Robert Eckardt, senior vice president for programs and evaluation, The Cleveland Foundation

**Moderator:** Mary Sobecki, grants manager, The Needmor Fund

---

**Ohio Issue Briefing: Prisoner Reentry**

Ohio’s prison population has increased significantly since passage of the 1996 “truth in sentencing” law, reaching an all-time high recently of over 50,000 offenders and a system operating at over 130% of capacity. Large numbers of previously incarcerated persons – over 28,000 in 2006 – are returning home to communities across Ohio, in need of health care, housing, employment and assistance in establishing healthy family and community relationships. This session will engage you in exploring ways in which funders can be involved in a coordinated community response to the challenge, including policy
and advocacy activities.
Moderator: Leah Gary, president and CEO, William J. and Dorothy K. O’Neill Foundation
Presenters: Linda Thompson Kohli, executive director, Ohio State Bar Foundation; Edward Marks, Advocates for Basic Legal Equality; Marcia Egbert, senior program officer, The George Gund Foundation; Elsie Day, consultant, Cuyahoga Reentry Strategy; Terry Collins, director, Ohio Department of Rehabilitation & Corrections; Edward Rhine, deputy director, Office of Policy and Offender Reentry, Ohio Department of Rehabilitation & Corrections

Pros and Cons of Signature Programs
Many corporations are looking for ways to increase the impact of their community involvement programs while generating more reputational return on their social investments. A strategic signature program can deliver these benefits - but is your company prepared for the level of commitment needed to make them successful? If your company has a signature program, are you realizing its full potential? Explore the opportunities and challenges of corporate signature programs in a session that will help you decide if your company is ready to take on such an initiative or if you’re getting the best bang for your buck with your current program.
Presenter: Richard Pringle, co-president, GrantStream Inc., and faculty, Boston College Center for Corporate Citizenship

SharePoint: Share Experiences
Offered in collaboration with the Ohio Regional Grants Managers Network
Learn from a panel of foundation staff as they discuss their experiences using SharePoint – a Microsoft web-based collaboration and document management platform – as a grants management and grantmaking tool. If your organization is using SharePoint, thinking about using SharePoint or just wants to find out what all of the buzz is about, this session is for you.
Speakers: Cecilia Render, director, Nordson Corporation Foundation; Jamie McGuire, business analyst, The Cleveland Foundation
Moderator: Jillian Darwish, Ed.D, executive director, Institute for Creative Collaboration, KnowledgeWorks Foundation
Sponsor: The Health Foundation of Greater Cincinnati

4:15 – 5:30 p.m. Sessions
investment strategies in a turbulent economy
Building your skills in managing and allocating foundation resources is especially critical in economic downturns. This session responds to that need, with an expert-led discussion on the latest thinking about asset management, investment and spending policies, working with investment managers and evaluating investment portfolios.
Speaker: W. Quincy Brown, vice president, Fund Evaluation Group, LLC
Moderator: Raymond J. Biddiscombe, vice president for finance and administration, The Columbus Foundation

The Program vs. Operating Support Debate
How can grantmakers best support nonprofit organizations? What is philanthropy’s role in shoring up the nonprofit sector? After an overview of research by the Center for Effective Philanthropy, be part of a facilitated dialogue on program vs. operating support.
Speaker: Romero Hayman, manager, Center for Effective Philanthropy
Moderator: Sally Duffy, SC, president and executive director, SC Ministry Foundation

What Keeps You Up at Night?
In this era of greater scrutiny, tough economic times and increased community needs, what are the most pressing issues facing community foundations today? Join your colleagues from around the state to hear what is on the
minds of community foundation CEOs and what they are doing about it.

Panel: Keith Burwell, president, Toledo Community Foundation; Michael M. Parks, president, The Dayton Foundation; Melissa A. Kleptz, executive director, The Troy Foundation; Mary Witten Wiseman, president, Foundation for the Tri-State Community, Inc.

Moderator: Kathryn E. Merchant, president/CEO, The Greater Cincinnati Foundation

The New United Way
Explore the impacts and implications that United Way’s new model poses for corporate supporters in a lively panel discussion with time for Q and A.

Presenter: Joseph V. Haggerty, chief operating officer, United Way of America

Moderator: Dennis Lafferty, director of office operations & client/civic relations, Jones Day

Hot Topics for Private and Family Foundations
Private foundation leaders begin roundtable discussions with brief remarks, sharing lessons learned and then giving you a chance to talk on eight topics: staffing up, archiving foundation documents, passing on vision & values, dealing with carry over, confidentiality issues, supporting grass roots organizations, balancing responsive and focused grantmaking and advocacy for small foundations.


Are you ready for the new 990?
Learn about the major changes to the new federal information return for public charities and what they mean for your public charity’s reporting of major activities, compensation and other items.

Presenter: Ronald Schultz, tax exempt and government entities division, IRS

Moderator: Stuart Cordell, trustee, The Robert S. Morrison Foundation

Preparing for the Unimaginable: Disaster Planning and Recovery
Offered in collaboration with the Ohio Regional Grants Managers Network
Sharing lessons learned from Hurricane Katrina, our speaker will build your knowledge about how to identify and prepare for challenges that face grantmakers when disaster strikes. Learn what you should consider when developing a plan—where to start, who to include and critical steps of advance preparation. Take-home materials will include information on developing a disaster recovery plan.

Speaker: Catherine Downs, senior consultant, The Crescent Group, Metairie, Louisiana

Moderator: Kathy Ladiner, program assistant, Nordson Corporation Foundation

Sponsor: The Health Foundation of Greater Cincinnati

Striking a Balance
Examine how corporate and other funders can better manage career and family demands in today’s high-pressure work environment.

Presenter: Kathleen Ashton, Ph.D., psychologist, Cleveland Clinic Foundation

6:30 – 8:30 p.m. Evening Host Event at The Corner Alley
Join us at The Corner Alley, a hip bowling alley and martini bar, on the hottest street in Cleveland – E. 4th. This street has been transformed from an area of urban blight into one of the most exciting entertainment venues in town.

Sponsor: Glenmede
Dine and Discover
Fourth Street is now home to a variety of new restaurants and clubs – including Lola, home of Iron Chef Michael Symon, and the only House of Blues in Ohio.

**Wednesday**
**October 29**

7 a.m. – 2 p.m.
Conference Registration
Living Legacies Recordings

8 – 9 a.m. Breakfast
Ohio Grantmakers Forum Annual Meeting
Hear an update on OGF’s activities in the past year, elect new trustees and receive the treasurer’s report.
Co-Sponsors: Jones Day and National City

9:15 – 10:15 a.m.
Ohio Issues Forum: Government Oversight: Too much or not enough?
The new Form 990 – complete with 16 schedules requesting information – is only one indication of the increased oversight the nonprofit sector faces. A spirited conversation poses the pros and cons of regulation and lets you share your opinions.
Presenters: Rick Cohen, national correspondent, The Nonprofit Quarterly
Moderator: David Abbott, executive director, The George Gund Foundation
Sponsor: The George Gund Foundation

9:30 a.m. – 12 p.m.
Site Visit: Euclid Avenue Renaissance
Once considered the city’s premier commercial artery, Euclid Avenue is once again the focus of activity as construction crews busily transform the avenue to attract new businesses and life. Tour the avenue to see how re-development plans are proceeding, how improving transportation will spur economic development and the role funders

---

GLENMEDE

**Proud Supporter of Ohio Grantmakers Forum**

Glenmede is an independently owned wealth advisory firm with over fifty years of experience managing the assets of affluent individuals, private foundations, and charitable trusts.

For more information, call Linda Olejko at 216-514-7876 or email linda.olejko@glenmede.com.

WWW.GLENMEDE.COM
are playing. Limited to first 20 registrants.

Tour leaders: Joseph Marinucci, president and CEO, Downtown Cleveland Alliance; Chris Ronayne, University Circle, Inc.

Sponsor: Kent H. Smith Charitable Trust

10:45 a.m. - 12 p.m. Sessions

Fraying of the Health Care Safety Net
Reductions and shifting in government funds, coupled with higher operating expenses, are taking their toll on critical health care providers, threatening their future sustainability. The health care safety net is being held together by threads, and creative thinking will be required to salvage and sustain it. The session starts off with an overview of the status of Ohio’s health care safety net, followed by examples of how funders can help providers through strategies such as capacity building, advocacy and collaboration.

Speakers: William Hayes, president, Health Policy Institute of Ohio; Terri Donlin Huesman, director of programs, Osteopathic Heritage Foundations; Judith Warren, MPH, senior program officer, community primary care, The Health Foundation of Greater Cincinnati; Marcia Egbert, senior program officer, The George Gund Foundation

Moderator: Mitchell Balk, president, The Mt. Sinai Health Care Foundation

Community Leadership Beyond Grantmaking
Community foundations are increasingly taking on new roles in the community. Whether they serve as communicators, bridge builders or advocates, they apply creativity and hard work to bring about effective community change. Join your colleagues to hear about exciting projects and lessons learned from community foundation leaders who work ‘outside the box’ to demonstrate community impact beyond grantmaking.

Speakers: Barbara Deerhake, past president, The Findlay-Hancock County Community Foundation; Michael M. Parks, president, The Dayton Foundation; Lucille G. Ford, president, Ashland County Community Foundation; Amy E. Cheney, vice president for giving strategies, The Greater Cincinnati Foundation

Moderator: Pamela H. Siegenthaler, president, Richland County Foundation

Beyond the Dollars
Private foundations can expand their effectiveness by taking on a variety of roles beyond grantmaking, all conveniently grouped under the term “direct charitable activities” such as convening, research, operating programs, technical assistance and nonprofit board service. A panel discussion of lessons learned from engaging in such activities will start the session, followed by roundtable conversations further exploring topics, challenges and successes.

Moderator: Deena Epstein, senior program officer, The George Gund Foundation

Presenters: Ruth Eppig, trustee, Sears Swetland Foundation; Deborah Hoover, president, The Burton D. Morgan Foundation

Leveraging Resources through Partnerships
As a grantmaking public charity, you face burgeoning complex issues that are difficult to address alone. Learn how to expand your impact beyond your grantmaking through creative partnerships during this interactive workshop. Gain insights that will help you understand the characteristics of successful partnerships, as well as opportunities and challenges that come from engaging in such endeavors.

Facilitators: Jewell K. Garrison, director of programs, Columbus Medical Association Foundation; Linda Thompson Kohli, executive director, Ohio State Bar Foundation

More Effective Education Grantmaking
Although many foundations make education grants, most don’t consider themselves education specialists. This workshop will present a user-friendly framework for education grantmaking, built on research-based best practices. Learn how to restructure your local education grantmaking portfolio to achieve better outcomes. This is a great session for those interested in education, whether you are a generalist or a specialist.
National City is proud to support the Annual Conference for the Ohio Grantmakers Forum which will be focused this year on Transforming Philanthropy.

We proudly work together with the communities we serve.

If you want to be remembered, do something memorable.
Presenters: Ellen Gilligan, vice president for community investment, The Greater Cincinnati Foundation; Patty O’Brien, executive director, The Stocker Foundation; Andy Benson, director of policy and communication, KnowledgeWorks Foundation

Drowning in Paperwork, Distracted from Purpose
Offered in collaboration with the Ohio Regional Grants Managers Network
The Grants Managers Network, the Council on Foundations, The Foundation Center and five other organizations have joined forces to promote streamlined grantmaking practices. During this session, foundation board and staff will review research results, provide input from their own experiences and consider industry standards that streamline application and reporting requirements.

Speaker: Michelle Greanias, executive director, Grants Managers Network
Moderator: Kerry Shaw, grants manager, Osteopathic Heritage Foundations
Sponsor: The Health Foundation of Greater Cincinnati

12:30 – 2 p.m. Lunch
The Message that Motivates
Nonprofit colleagues will join you in hearing Perla Ni, founder and CEO of GreatNonprofits and founder and former publisher of the Stanford Social Innovation Review, as she draws from her extensive background in the nonprofit sector. Given the funding challenges in this economy, she will talk about how nonprofits can be better marketers and story tellers and how funders can help as advocates. You will also be the first to hear the latest news about charitable giving in Ohio with the release of Ohio: The State of Philanthropy 2008.

Speaker: Perla Ni, founder and CEO, GreatNonprofits; founder and former publisher, Stanford Social Innovation Review

2 p.m.
Conference adjourns

Thanks to our Annual Conference Committee
Ronald B. Richard, chair, The Cleveland Foundation
Joseph B. Baldasare, The Dayton Foundation
Victoria Urban Broer, Weathertop Foundation
Kimberly Cutlip, The Scioto Foundation
Jewell K. Garrison, Columbus Medical Association Foundation
Karen Hooser, The Reinberger Foundation
Pam Howell-Beach, The Stranahan Foundation
Rebe H. H. Honda of America Mfg., Inc.
LaTida Lester, Saint Luke’s Foundation
Beth Maiden, Community Foundation of Lorain County
Ann Mullin, The George Gund Foundation
Kathleen Stecky, The Cleveland Foundation
Mary Sobecki, The Needmor Fund
Susan Urano, The Athens Foundation
Ray Watson, The Greater Cincinnati Foundation
Yvonne Whitaker, The Fred and Alice Wallace Charitable Memorial Foundation

Thanks to our Host Committee
Denise San Antonio Zeman, chair, Saint Luke’s Foundation
Beth Maiden, Community Foundation of Lorain County
Leslie Dunford, The Cleveland Foundation
Karen Bartram Jansen, The Cleveland Foundation
Terry Bishop, Dominion
Deena Epstein, The George Gund Foundation
Cristin Slesh, Foundation Management Services
Cynthia Bailie, The Foundation Center, Cleveland
Why should you attend the 2008 OGF Annual Conference?

10. If you’ve never seen the northeast Ohio airports, don’t worry, you won’t have to start now. It’s just that close to home.

9. Discover how you can transform philanthropy within your organization and position.

8. Show off your 300 bowling score to your colleagues at The Corner Alley Host Event.

7. Have you read the conference brochure? Need we say more?

6. See the next Ohio Philanthropy Award superstar accept his/her trophy.

5. Hear Knight Kiplinger’s economic forecast.

4. Double your stack of business cards from across the state.


2. It’s your chance to take a three-day hiatus from work, boss-approved.

And the number one reason:
Drum roll, please.

1. Finding out what George has staff do at the Annual Meeting. Will the OGF car make an encore appearance? Will there be costumes? Hula hoops? Who knows?

About OGF. Ohio Grantmakers Forum is an association of foundations, corporate contributions programs and other grantmaking organizations. Its mission is to provide leadership for organized philanthropy in Ohio and to enhance the ability of members to fulfill their charitable goals.

Save on your conference fees by joining OGF. Join as a full member before you register and you’ll save significantly on registration costs. OGF pro rates its dues, so new members pay only for the remainder of the year and also get access to the member side of the website and member-only events, special rates on services offered by vendors and all newsletters and research reports and policy briefings.

Associate Membership. Join as an associate member ($300) and pay only half of this year’s registration fee. OGF’s Associate Membership is designed for small, independent foundations that award $250,000 or less in grants annually. You’ll also get year-round access to a section of the website developed just for the needs of small foundations and monthly electronic newsletters.

Visit the website www.ohiograntmakers.org or call us at 614-224-1344 for more information.
Q: I like to come early for the pre-conference sessions – what’s offered this year?
A: There is plenty to learn and do on Monday, including:
• A lunch update on Ohio’s early childhood education agenda;
• A session on increasing access to recreation;
• A workshop on Ohio’s mental health care system; and
• A tour of University Circle and reception for family foundations.

Q: Do you offer any discounts on registration?
A: We sure do! Choose from 1 of 3 $50 discounts – early registration, first-time attendee or multiple registrants – explained on page 17.

Q: Where did Cleveland get its name?
A: Cleveland is named for Moses Cleaveland (1754-1806), a lawyer and Revolutionary War soldier. Cleveland lost that extra “a” in its name when an early area newspaper, the “Cleveland Advertiser,” didn’t have room across the masthead for the extra letter and the shortened name stuck.

Q: Will I have time to connect with colleagues I only see once a year at the conference?
A: Absolutely: we know that networking is a prime reason you come to the event so we’ve built in time to mingle at meals, between sessions and at off-site events.

Q: What famous people have come from Cleveland?
A: Well, you have your typical Halle Berry, Drew Carey and Phil Donahue. But, can everyone say that Chef Boyardee was from their hometown? Yep, Chef Boyardee was a Clevelander! Hector Boiardi owned a dine-in and carryout Italian restaurant here that evolved into a convenience foods line children love. Note the spelling change…interesting.

Q: Conference Hotel
The Cleveland Marriott Downtown at Key Center is in the heart of Cleveland’s business district near the Quicken Loans Arena and the Cleveland Browns stadium.

Cleveland Marriott Downtown at Key Center
127 Public Square • Cleveland, OH 44114
Phone: 216-696-9200 • Fax: 216-696-0966

Hotel Reservations
OGF’s room block, for October 27 and October 28, is $149 for single or double occupancy and must be reserved by October 3. Your room costs are paid directly to the Marriott.

To reserve your room, visit www.ohiograntmakers.org, go to the OGF conference page and click on the hotel information link. It takes you to the hotel’s home page with the OGF code already entered; enter your arrival date to begin the reservation process. Or, call the hotel at 216-696-9200, being sure to mention you are attending the OGF conference to receive the reduced rate.

Q: What other “firsts” has Cleveland had?
A: Well, let’s not forget the world’s first community foundation: The Cleveland Foundation, founded in 1914, and the nation’s third-largest community foundation today. Other firsts include: home delivery of mail, indoor shopping center, electric streetcar and electric streetlight.

Q: What other “firsts” has Cleveland had?
A: From candy to characters, Cleveland is known for quite a few famous creations. Clevelanders Jerry Siegel and Joe Shuster created the comic book character Superman in 1933 while chocolate maker Clarence Crane created Life Savers in 1891.

Q: Conference Registration Eligibility
A: Only grantmaking organizations eligible for OGF membership are eligible to register for the conference. Please refer to our website (www.ohiograntmakers.org) for membership criteria or call OGF at 614-224-1344. Participants are welcome to register spouses or guests for Tuesday evening’s host event.

Q: Not a member?
A: Join now and save on conference registration. Call us at 614-224-1344 for membership information.

Q: Why is the Rock n’ Roll Hall of Fame in Cleveland?
A: Maybe because Alan Freed, a Cleveland radio DJ, coined the term “Rock n’ Roll” in 1952. Then, later in the year, the first “Rock n’ Roll” concert, The Moondog Coronation Ball, was held in Cleveland. Cleveland was selected as the site of the Rock and Roll Hall of Fame and Museum in 1986 and it opened in 1995.
DISCOUNTS. Full conference registrations postmarked on or before October 3 are discounted. One discount per person.

REFUNDS. Full refunds, less a $25 processing fee, will be offered for cancellations received by October 15, 2008. No refunds will be offered after October 15, 2008.

MULTIPLE REGISTRANTS. Please duplicate this form for additional registrations.


<table>
<thead>
<tr>
<th>Full Conference</th>
<th>Member</th>
<th>Non-Member</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Early Bird Discount:</strong> Full conference if postmarked by October 3</td>
<td>$435</td>
<td>$605</td>
<td>$</td>
</tr>
<tr>
<td>Full conference if postmarked after October 3</td>
<td>$485</td>
<td>$655</td>
<td>$</td>
</tr>
<tr>
<td><strong>Multiple Registration Discount:</strong> Full conference</td>
<td>$385</td>
<td>$555</td>
<td>$</td>
</tr>
<tr>
<td>To receive multiple registration discount:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• One person from an organization must first pay the full conference fee.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Multiple registrations from one organization must be submitted together - use a separate form for each registration.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Payment must be postmarked by October 3.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full conference new Associate Member</td>
<td>$220</td>
<td>N/A</td>
<td>$</td>
</tr>
<tr>
<td>• Associate members receive 1/2 off full conference fee for their first year of membership. Learn more about Associate Member Benefits on page 15.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>First-Time Member Attendee Discount:</strong> Full conference</td>
<td>$385</td>
<td>N/A</td>
<td>$</td>
</tr>
<tr>
<td>• First-time conference attendees receive a discount on full conference registration (OGF Members only).</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Partial Conference</th>
<th>Member</th>
<th>Non-Member</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuesday ONLY including Evening Host Event</td>
<td>$240</td>
<td>$325</td>
<td>$</td>
</tr>
<tr>
<td>Wednesday ONLY</td>
<td>$200</td>
<td>$285</td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Optional Events</th>
<th>Member</th>
<th>Non-Member</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday Early Childhood Education &amp; Care Funders Luncheon</td>
<td>$50</td>
<td>$75</td>
<td>$</td>
</tr>
<tr>
<td>Monday: Promoting Universal Design in Recreation</td>
<td>No Fee</td>
<td>No Fee</td>
<td>Ø</td>
</tr>
<tr>
<td>Monday: Transforming Mental Health Care</td>
<td>$40</td>
<td>$55</td>
<td>$</td>
</tr>
<tr>
<td>Monday: Legacy of Family Philanthropy in University Circle</td>
<td>$50</td>
<td>$75</td>
<td>$</td>
</tr>
<tr>
<td>Tuesday Evening Host Event ONLY</td>
<td>$60</td>
<td>$85</td>
<td>$</td>
</tr>
<tr>
<td>Spouse or Guest Fee for Tuesday Evening Host Event</td>
<td>$60</td>
<td>$85</td>
<td>$</td>
</tr>
<tr>
<td>Bus from Cincinnati to Cleveland</td>
<td>$100</td>
<td>$100</td>
<td>$</td>
</tr>
</tbody>
</table>

- over -
ATTENDEE INFORMATION
Name ____________________________________________________________
Title ____________________________________________________________
Organization ______________________________________________________
Street Address _____________________________________________________
City, State, ZIP ____________________________________________________
Phone ______________________________ Fax ____________________________
Email ____________________________________________________________
Guest’s Name (FOR HOST EVENT) ____________________________________

BILLING
Credit Card: ☐ Visa ☐ MasterCard ☐ AMEX ☐ Billing address same as above
Name on Card _______________________________________________________
Acct. No. __________________________ Exp. ____________________________
Signature ____________________________ __________________________________
Billing Address _____________________________________________________

PLEASE CHECK ANY SPECIAL NEEDS:
☐ Vegetarian ☐ Kosher ☐ Diabetic ☐ Non-Dairy
☐ Other: __________________________________________________________
☐ Physical limitations: _________________________
☐ I am a first-time attendee.
☐ I give OGF authorization to provide my contact information to exhibitors/sponsors before and after the conference.
☐ I want to reserve a bus seat.

INDICATE SESSIONS YOU WILL ATTEND:
MONDAY, OCTOBER 27
(ADDITIONAL FEES APPLY. SEE PAGE 17)
☐ Early Childhood Education Luncheon
☐ Universal Design in Recreation
☐ Transforming Mental Health Care
☐ Family Philanthropy Tour

TUESDAY, OCTOBER 28
8:45 – 10 a.m.
☐ Breakfast: Michael Lerner

10:30 – 11:45 a.m. (choose one)
☐ Economic Forecast
☐ Strategic Grantmaking

12:15 – 2 p.m.
☐ Lunch: Sterling Speirn and Ohio Philanthropy Award

2:30 – 3:45 p.m. (choose one)
☐ Defining & Communicating your Brand
☐ Asset Growth Through Partnerships
☐ Compensation and Benefits Issues
☐ The Board Chair/CEO Relationship
☐ Exploring Grantmaker/Grantseeker Relationships
☐ Ohio Issue Briefing: Prisoner Reentry
☐ Signature Programs
☐ SharePoint: Share Experiences

4:15 – 5:30 p.m. (choose one)
☐ Investment Strategies
☐ Program vs. Operating Support
☐ What keeps you up at night?
☐ The new United Way
☐ Private Foundation Roundtables
☐ Are you ready for the new 990?
☐ Disaster Planning and Recovery
☐ Striking a Balance

6:30 – 8:30 p.m.
☐ Host Event

WEDNESDAY, OCTOBER 29
8 – 9 a.m.
☐ Breakfast: Annual Meeting

9:30 a.m. – 12 p.m. (Choose the site visit or TWO shorter sessions)
☐ Site Visit: Euclid Avenue Renaissance

9:15 – 10:15 a.m.
☐ Ohio Issues Forum

10:30 – 12 p.m. (choose one)
☐ Health Funders
☐ Community Leadership
☐ Beyond the Dollars
☐ Leveraging Resources
☐ Effective Education Grantmaking
☐ Drowning in Paperwork

12:30 – 2 p.m.
☐ Lunch: Perla Ni

HELP REDUCE WASTED FOOD.
Make sure to check the boxes for the meals/keynote sessions you will attend.
PLATINUM SPONSORS

GLENMEDE

GOLD SPONSORS

Cleveland Foundation

SILVER SPONSORS

The George Gund Foundation

BRONZE SPONSORS

The Reinberger Foundation

The Health Foundation of Greater Cincinnati

PARTNERS

Dave Thomas Foundation for Adoption
FirstEnergy Foundation
Jones Day
National City

SPONSORS

Sisters of Charity Foundation of Cleveland
Squire Sanders Legal Counsel Worldwide

SUPPORTERS

The Greater Cincinnati Foundation
GAR Foundation
Generation Foundation
The Burton D. Morgan Foundation

The Mt. Sinai Health Care Foundation
Sisters of Charity Foundation of Canton
Kent H. Smith Charitable Trust

FRIENDS

Deaconess Community Foundation
Dominion Foundation
Eaton Corporation
Martha Holden Jennings Foundation

Robert S. Morrison Foundation
Ohio State Bar Foundation
The William J. and Dorothy K. O’Neill Foundation
The Raymond John Wean Foundation
Reserve a Seat on the OGF Bus:
  September 20, 2008

Reserve Your Hotel Room:
  October 3, 2008

Early Bird Registration:
  October 3, 2008

Final Registration:
  October 15, 2008

Time is tick, tick, ticking away...

REGISTER ONLINE TODAY. . .WWW.OHIOGRANTMAKERS.ORG