Dear Colleagues,

Welcome to the 2008 Southeastern Council of Foundations Annual Meeting and Asheville, North Carolina. Like philanthropy, vibrant and unique, Asheville has an energy all its own. We hope you take time to enjoy the art and nature, culture and mountain flavor of the area.

We are excited about the array of sessions, wealth of engaging topics and speakers included in this year’s meeting. They are sure to challenge you as we discuss a variety of timely issues, launch reflective peer dialogue and offer many opportunities for networking and fellowship. Ultimately, they are certain to enhance your foundation’s efforts in philanthropy.

This gathering will be Martin Lehfeldt’s last official SECF conference, and we will celebrate his presidency and call upon him for some final remarks during the Chairman’s Dinner on Wednesday, November 12. Mr. Michael R. Howland, CAE, our new President and CEO, will address the group during the opening session. We hope you find an opportunity to welcome Mike during the Thursday evening reception and wish him much success in his new role.

Again, welcome to the Annual Meeting and to Asheville. If there is anything we can do to make your experience more enjoyable or rewarding, please feel free to speak with one of the Program Committee members or with a member of SECF staff.

Sincerely,

Mary Humann Judson, Co-Chair
Executive Director
Jesse Parker Williams Foundation

Thomas C. Keith, Co-Chair
Executive Director
Sisters of Charity Foundation of South Carolina

2008 Annual Meeting Program Committee

Brooke Bailey, Sisters of Charity Foundation of SC
Joseph D. Crocker, Z. Smith Reynolds Foundation
John H. Estes, Richmond Memorial Health Foundation
Robert M. Fockler, Community Foundation of Greater Memphis
Lesley Grady, The Community Foundation for Greater Atlanta, Inc.
Dr. Reid Hanson, Jr., Peyton Anderson Foundation
Susan Jenkins, Ph.D., Cherokee Preservation Foundation

Allen Mast, The W.I.H. and Lula E. Pitts Foundation
Robert W. Morris, Community Foundation of Greater Greenville, Inc.
Dot Neale, IBM Corporation
Sabrina Jones Niggel, J. Marion Sims Foundation, Inc.
Betsey Russell, Last Word, LLC
Lisa H. Sharpe, John Randolph Foundation
Marty Sonenshine, Anverse, Inc.
Nina M. Watters, The Community Foundation in Jacksonville
Robb Webb, The Duke Endowment

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About the Artwork

The photography featured in this brochure is the work of students in the Fine Art Department of The University of North Carolina at Asheville, under the tutelage of Assistant Professor Pam Pecchio. Specific credits are as follows: Cover, Liz McCarthy; Mountainscape background throughout, Katie Murray; Page 3, Katie Murray; Page 4, Beckie Harmon; Page 8, Melissa Hunsucker; Page 11, Beckie Harmon; Page 12, Katie Murray.
Complimentary Shuttle Service
The shuttle provides transportation between The Grove Park Inn and the Renaissance Hotel. Shuttle departs The Grove Park Inn on the hour, from Vanderbilt Wing, Level 7, and departs the Renaissance Hotel on the half-hour, from the lobby level.

**Tuesday:** 2:00 p.m. – 5:00 p.m.
**Wednesday:** 7:30 a.m. – 12:00 midnight
**Thursday:** 7:15 a.m. – 8:30 p.m.
**Friday:** 6:30 a.m. – 1:00 p.m.

Book Sales Hours
**Tuesday:** 2:00 p.m. – 5:00 p.m.
Sammons Wing, Lobby Level, Registration Area
**Wednesday:** 1:00 p.m. – 2:00 p.m.
Sammons Wing, Lobby Level, Registration Area
**Thursday:** 9:30 a.m. – 2:00 p.m.
Vanderbilt Wing, Level 8, Pre-Function Area
**Friday:** 10:30 a.m. – 1:00 p.m.
Vanderbilt Wing, Level 8, Pre-Function Area

**Tuesday, November 11**

**10:00 a.m. – 3:30 p.m.**
**The Biltmore Estate Day Tour**
Tour departs from the Vanderbilt Wing, Level 7, at 10:00 a.m.

Enjoy a self-guided tour of Biltmore House and winery, as well as a complimentary wine tasting.

**1:00 p.m. – 4:30 p.m.**
**Historic Asheville Area Art and Artists Tour**
Tour departs from the Vanderbilt Wing, Level 7, at 1:00 p.m.

Discover the past celebrated through arts and crafts through unique exhibits and demonstrations.

**2:00 p.m. – 5:00 p.m.**
**Registration & Information**
Sammons Wing Registration Desk, Lobby Level

**Cyber Café & Resource Center**
Vanderbilt Wing, Level 8, Coolidge D
Sponsor: Foundation Source Charitable Foundation

**PaintFest – Group Service Project**
Sammons Wing Foyer, Lobby Level
Sponsor: Robert & Polly Dunn Foundation

Since 1984, 300,000 volunteers and patients have united in an effort to create more than 30,000 paintings for some 1,500 hospitals in 194 countries. These paintings bring comfort and hope through art to people in healthcare facilities around the world and help make them a more beautiful place for healing. SECF is partnering with the Foundation for Hospital Art and invites you to come share your painting experience at the PaintFest. We’ll share the end results at the Friday closing session.

**Film Festival**
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
(Screenings start at 3:30 p.m.)

**Pre-Conference Sessions**
(Pre-registration is required.)
**9:00 a.m. – 12:00 noon**

**Grantmaking 101**
Vanderbilt Wing, Level 8, Roosevelt

Lin Hollowell, Program Officer, The Duke Endowment, Charlotte, NC

Sabrina Jones Niggel, Program Officer, J. Marion Sims Foundation, Inc., Lancaster, SC

Anne Sterchi, Executive Director, The J. B. Fuqua Foundation, Inc., and The Realan Foundation, Atlanta, GA

Designed for staff and board members of foundations with fewer than three years of experience, this session will provide an overview of the key factors involved in analyzing proposals and will expound on methods to increase efficiency and effectiveness throughout the grantmaking process. In this interactive session, participants will exchange ideas and materials and will also address potentially sensitive issues, including grantor-grantee relations, declinations and grant-funded programs that go awry. Other topics include information management, grant contracts, payout and site visits. The session will equip and provide opportunities to forge a network of support among peers.

**Wednesday, November 12**

**8:00 a.m. – 6:00 p.m.**
**Registration & Information**
Sammons Wing Registration Desk, Lobby Level

**Cyber Café & Resource Center**
Vanderbilt Wing, Level 8, Coolidge D
Sponsor: Foundation Source Charitable Foundation

**PaintFest – Group Service Project**
Sammons Wing Foyer, Lobby Level
Sponsor: Robert & Polly Dunn Foundation
Foundations are constantly advised to become more “strategic,” but it is not always clear just what that means in the real world. Does it mean to focus on just a few big grantees to the exclusion of smaller ones? Does it mean that the foundation must become more prescriptive and less flexible? Or does it mean that greater discipline will produce better results? Join the faculty of The Grantmaking School (with whom SECF has partnered for several years to conduct three-day sessions in the region) for an interactive series of exercises that will help you to work your way through the promise and the tradeoffs of strategic grantmaking. This session is intended for grantmakers with at least two years of experience who have already learned such basics as reading proposals, writing assessments and composing funding documents.

Providing Exceptional Services to Families — Community Foundation Strategies for Family Philanthropy

Vanderbilt Wing, Level 8, Taft

This session will highlight the action research conducted by The Philanthropic Initiative with community foundations in the US that have initiated special family philanthropy services. The session will provide practical information about where to begin, costs, staffing and management of these new services.

Advanced Foundation Governance for Board Members, Trustees and Officers

Vanderbilt Wing, Level 8, Hoover

Facilitator: Alice Buhl, Senior Associate and Director of Philanthropic Services, Lansberg Gersick, Pittsboro, NC

Harvey Gantt, Architect and Immediate Past Chair of the Foundation For The Carolinas, Charlotte, NC

Minor Shaw, Businesswoman and Director of the Daniel-Mickel Foundation, The Hollingsworth Funds and The Duke Endowment, Greenville, SC

The Hon. William Barnet, Mayor of Spartanburg and Trustee of The Duke Endowment, Spartanburg, SC

An overview of the legal, ethical and operational issues that foundation officers and staff members face. The session is for board members and volunteers from all foundations.

Poverty Simulation

9:30 a.m. – 12:00 noon

Vanderbilt Wing, Level 8, Wilson

Sharon Novinger, Executive Director, Lancaster County Partners for Youth Foundation, Lancaster, SC

This thought-provoking workshop aims to provide a better understanding of the challenges faced by poor families by simulating the experiences of those who fall below the federal poverty level. Participants will assume the roles of family members for three 20-minute “weeks” and be responsible for managing a household with limited resources. Scenarios are based on real experiences for families that endure poverty-related hardship. (Note: This session can serve a maximum of 60 participants. It is also essential that participants be prepared to begin the session promptly at 9:30 a.m.)

Pre-Conference Site Visits/ Tours/Activities

All tours and site visits will depart from Vanderbilt Wing, Level 7

9:00 a.m. – 12:00 noon

Warren Wilson College – Educating the Next Generation of Environmental Leaders

Cost: $25.00 - Pre-registration is required.

Dr. Sandy Pfeiffer, President, Warren Wilson College, Swannanoa, NC

Sallie-Grace Tate, Vice President, Warren Wilson College, Swannanoa, NC

Warren Wilson College, founded by Presbyterians in 1894, is a four-year institution that combines study of the liberal arts with work and service. Recently selected as the “greenest” college in the Southeast, Warren Wilson is a national leader in environmental studies, practical sustainability initiatives and environmental leadership.

This site visit will include an easy walking tour of the campus that includes one of the nation’s first EcoDorms, the Southeast’s first LEED Gold Certified...
college building, the sustainable organic farm and food production facility and its home grown biodiesel program that powers campus vehicles and farm equipment. We will also learn about Warren Wilson’s nationally renowned Environmental Leadership Center and its efforts to assist churches and nonprofit organizations reduce their environmental impact.

**Biodiversity and Stewardship in Southern Appalachia**  
*Cost: $25.00 - Pre-registration is required.*

Philip Francis, Superintendent, Blue Ridge Parkway Center, Asheville, NC  
George Briggs, Executive Director, North Carolina Arboretum, Asheville, NC

Although most people don’t realize it, Southern Appalachia is one of the richest spots for biodiversity on earth. Yet, we are only beginning to understand the vast number of species that live here and their importance now and in the future. Could a plant or insect from this area be the source for the next treatment for Alzheimer’s or other illnesses? We’ll visit two longstanding stewards of biodiversity and conservation as we explore the area’s environmental heritage and hopes.

Our tour will begin at the new Blue Ridge Parkway Destination Center and continue along the Parkway to the North Carolina Arboretum, a 434-acre public facility that focuses on education, economic development, research, conservation and garden demonstration. Presenters from the National Park Service and Arboretum will be available for questions during our ride back to the Grove Park Inn.

**The Role of the Nonprofit Sector in Place-Based Economic Development in Western North Carolina**  
*Cost: $25.00 - Pre-registration is required.*

Greg Walker-Wilson, CEO, Mountain BizWorks, Asheville, NC  
Geraldine Plato, Executive Director, Handmade in America, Asheville, NC

Citizens of Western North Carolina have long been known for their entrepreneurial spirit and can-do attitude. The area never had many large corporations and most textile mills are now closed. This difficult situation, as well as changing demographic patterns, are challenging the region to sustain living-wage jobs. Learn how two organizations – Mountain BizWorks and Handmade in America – have helped create a thriving local small business community as the backbone for economic development in the region.

**10:00 a.m. – 3:30 p.m.**  
**The Biltmore Estate Day Tour**  
Tour departs from the Vanderbilt Wing, Level 7, at 10:00 a.m.

**12:00 noon – 1:00 p.m.**  
**Women’s Giving Programs Luncheon**  
Sammons Wing, Lobby Level, Laurel F&G  
*Cost: $40.00. Pre-registration is required.*

Colleen Willoughby, Founder, Washington Women’s Foundation, Seattle, WA

This session will focus on women’s funds and funding networks.

**12:00 noon – 1:00 p.m.**  
**Class of 2008 Only - Hull Fellows Luncheon**  
Sammons Wing, Lobby Level, Laurel H&J  
*Sponsor: Anverse*

**12:00 noon – 1:00 p.m.**  
**Networking Luncheon for Corporate Foundations & Giving Programs**  
Sammons Wing, Lobby Level, Heritage A  
*Sponsor: Blue Cross and Blue Shield of North Carolina Foundation*

**1:00 p.m. – 4:30 p.m.**  
**Historic Asheville Area Art and Artists Tour**  
Tour departs from the Vanderbilt Wing, Level 7, at 1:00 p.m.
1:00 p.m. – 1:45 p.m.
New Member and 1st Time Attendee Orientation
Vanderbilt Wing, Level 8, Eisenhower

1:45 p.m. – 2:00 p.m.
Networking Break

2:00 p.m. – 3:15 p.m.
Welcome, Brief Business Meeting, Hull Fellows Awards and Keynote Speaker
Vanderbilt Wing, Level 8, Grand Ballroom A
Sponsor: Wachovia Trust

Welcome: The Hon. Terry Bellamy, Mayor of Asheville

Keynote: Michael R. Howland, CAE, President and CEO, Southeastern Council of Foundations, Atlanta, GA

3:15 p.m. – 3:30 p.m.
Networking Break

3:30 p.m. – 4:45 p.m.
Film Festival
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
“Mary’s Gone Wild” 11 minutes
“The Guestworker” 52 minutes

Concurrent Sessions I
3:30 p.m. – 4:45 p.m.

Independent Foundations Legal Update
Vanderbilt Wing, Level 8, Grand Ballroom A
James K. Hasson, Jr., Sutherland, Asbill & Brennan, LLP, Atlanta, GA

Corporate Foundations and Giving Programs Legal Update
Vanderbilt Wing, Level 8, Hoover
Cassady V. Brewer, Partner, Tax Group, Morris, Manning & Martin, LLP, Atlanta, GA
Jennifer Levine Hartz, President, Corporate Hartz, LLC, Atlanta, GA

Small Family Foundations Making A Difference in Communities
Vanderbilt Wing, Level 8, Eisenhower
Amy Zell Ellsworth, Senior Philanthropic Advisor, The Philanthropic Initiative, Boston, MA
Come learn how small grants make a difference in communities. Join trustees and staff of small family foundations in a lively facilitated conversation about challenges and success stories. Share grant-making, governance and professional development strategies and learn what practices are working and how to maximize the impact of your small family foundation.

The Bottom Line – Governing and Managing Relationships with Financial Institutions
Vanderbilt Wing, Level 8, Roosevelt
Andrew Schulz, Esquire, Council on Foundations, Arlington, VA
This session for community foundation board members and leaders will provide an overview of governance and management responsibilities pertinent to working with financial institutions and focus on strategies for developing and managing reasonable expectations in a changing economy.

Mental Health Access: More than an Insurance Problem
Vanderbilt Wing, Level 8, Wilson
James M. Martinez, Director, Office of Mental Health, VA Dept. of Mental Health, Mental Retardation and Substance Abuse Services, Richmond, VA
Is the United States on the threshold of a mental health crisis? Can the mental health system be fixed through legislation, education, providers or insurance companies? This session will examine these issues and possible solutions.

From Concepts to Reality: Foundations Role in Effecting Policy & Systemic Change
Vanderbilt Wing, Level 8, Grand Ballroom C
Lisa Potts, Esq., Policy Director, South Carolina Center for Fathers and Families, Columbia, SC
Many people believe that foundations can play an important role in having an impact upon public policy and effecting systemic change. Yet, the successful implementation of that concept can be difficult to achieve, let alone to replicate. This panel will share success stories and on-going work that builds upon grantmaking to change policy and to impact systems. The presenters will also describe lessons learned about the key ingredients in policy change strategies, the importance of timing, expectations for financial investment and what has not worked.

3:30 p.m. – 5:00 p.m.
Hull Fellows Meeting
(Class of 2008 only)
Vanderbilt Wing, Level 8, Taft

5:30 p.m. – 6:15 p.m.
Hull Alumni Reception
(All classes, 2000-2008)
Sammons Wing, Lobby Level, Heritage C
Sponsor: The Duke Endowment

5:30 p.m. – 6:15 p.m.
New Member & First-Time Attendees Reception
Sammons Wing Balcony, Lobby Level
(Backup location: Heritage A)
Sponsor: Northern Trust

Thursday, November 13

7:30 a.m. – 4:00 p.m.
Registration & Information
Vanderbilt Wing Registration Desk, Level 8

Cyber Café & Resource Center
Vanderbilt Wing, Level 8, Coolidge D
Sponsor: Foundation Source Charitable Foundation

6:15 p.m. – 7:00 p.m.
Chairman’s Reception
Sammons Wing, Lobby Level, Heritage Ballroom
Sponsor: SunTrust

7:00 p.m. – 7:15 p.m.
Group moves over to the Vanderbilt Wing

7:15 p.m. – 9:30 p.m.
Chairman’s Dinner and Tribute to Martin Lehfeldt
Vanderbilt Wing, Level 8, Grand Ballroom
Sponsor: SunTrust

9:30 p.m. - 11:00 p.m.
Chairman’s Dance
Vanderbilt Wing, Level 8, Grand Ballroom
DJ music, Dancing and Drinks

Film Festival
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
(Screenings start at 9:45 a.m.)

7:30 a.m. – 8:30 a.m.
Community Foundations Only Breakfast Session: Strategies for Enhancing Family Philanthropy in Community Foundations
Sammons Wing, Lobby Level, Laurel

Amy Zell Ellsworth, Senior Philanthropic Advisor, The Philanthropic Initiative, Boston, MA
Moderator:
C. Dennis Riggs, President and CEO, Community Foundation of Louisville, Louisville, KY

This session will highlight the action research conducted by The Philanthropic Initiative with community foundations in the US that have initiated special family philanthropy services. The session will provide practical information about where to begin, costs, staffing and management of these new services.

7:45 a.m. – 8:30 a.m.
Breakfast Buffet & Announcements
Vanderbilt Wing, Level 8, Grand Ballroom B&C
Sponsor: The Phil Hardin Foundation

8:30 a.m. – 8:45 a.m.
Break
**Southeastern Council of Foundations 2008 Annual Meeting**

**Concurrent Sessions II**

**The Extraordinary Things We Might Accomplish Together**
Vanderbilt Wing, Level 8, Grand Ballroom A
Sponsor: Baptist Community Ministries

Peter Karoff, Founder and Chairman, The Philanthropic Initiative, Boston, MA
Leslie Lilly, Vice President of Programs, The Community Foundation for Palm Beach and Martin Counties, West Palm Beach, FL

A special opportunity for foundation board and staff members to join a conversation about the meaning of all that we do. Peter Karoff, founder of The Philanthropic Initiative, last year produced *The World We Want*, a remarkable collection of interviews with and wonderfully wise reflections by philanthropists and philanthropoids, including our own region’s Jack Murrah, Leslie Lilly and Martin Lehfeldt. This program, which will include a dialogue between Peter and Leslie, is an invitation to consider “the extraordinary things we might accomplish together.” Copies of *The World We Want* will be available for sale and autographing.

**Economic Impact of Hispanic Immigration**
Vanderbilt Wing, Level 8, Wilson

Hispanic immigrants, both authorized and unauthorized, are changing the demographic and economic landscape of the United States. Using data from two Southern states, this session will document the nature and magnitude of this population change and will estimate the economic impact as well as the associated costs and benefits of these Hispanic residents.

**Executive Transition: When Is It Time To Go?**
Vanderbilt Wing, Level 8, Roosevelt

Jack Murrah, Executive Director, Lyndhurst Foundation, Chattanooga, TN
Leslie Graitcer, Independent Advisor/Consultant on Education Philanthropy, Atlanta, GA
Pat Smith, President, Community Foundation of Western North Carolina, Asheville, NC
Moderator: Tom Lambeth, Senior Fellow and Former Executive Director, Z. Smith Reynolds Foundation, Winston-Salem, NC

Foundation executives often observe, “I have the best job in the world!” Nonetheless, although “executive for life” might be an appealing title to some, is it best for the individual or the organization? Once you’ve dedicated years of your career to a foundation, how do you recognize the right time to make a transition? How do you balance personal needs and goals with those of the organization? What role should you play in planning for transition and helping the board find your successor? And how do you “let go” without losing your commitment and connections? Join four veteran foundation leaders from private, corporate and community foundations as they share their stories and wisdom about making this all-important transition thoughtfully and gracefully.

**Concurrent Sessions III**

**Community Foundations Legal Update**
Sammons Wing, Lobby Level, Laurel

Andrew Schulz, Esquire, Council on Foundations, Arlington, VA

**Multigenerational Family Philanthropy Part I**
Vanderbilt Wing, Level 8, Eisenhower

Dr. Stephen R. Treat, Director and CEO, Council for Relationships, Philadelphia, PA

This session will focus on the challenges and joys families experience when making charitable decisions together. With four generations around our philanthropic tables, generational differences do arise. Come prepared for hands-on interactive activities and group discussions to discover your own “generational personality,” how your values align with those of our family members, and how parents, grandparents and adult children can begin to work together.

**Networking Break**

**Film Festival**
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
“The Wizard of Photography” 60 minutes
Prudent Asset Allocation in Turbulent Markets  
Vanderbilt Wing, Level 8, Grand Ballroom A

F. Lee Bryan, III, Managing Director, Deutsche Bank Alex. Brown, Winston-Salem, NC

William D. Spry, Jr., AIF, Director and Registered Investment Advisor, Representative, Deutsche Bank Alex. Brown, Winston-Salem, NC

Jason D. Zaks, AIF, Director and Registered Investment Advisor, Representative, Deutsche Bank Alex. Brown, Winston-Salem, NC

Investment professionals from Deutsche Bank Alex Brown will discuss how to establish investment and spending policies. They will also review how investment strategies lead to asset allocation guidelines and how to hire investment managers for each asset class. Finally, these professionals will review the use of non-traditional assets like REITs, commodities and hedge funds to protect an endowment during recessionary periods.

People and Jobs on the Move: Implications for U.S. Competitiveness  
Vanderbilt Wing, Level 8, Wilson

James H. Johnson, Jr., Ph.D., Director, Urban Investment Strategies Center & Co-Director, Center for Sustainable Enterprise, Kenan Institute of Private Enterprise, The University of North Carolina at Chapel Hill, Chapel Hill, NC

Two powerful and “colorful” demographic forces—the “browning” and “graying” of America—and one emergent and dynamic economic trend—the so-called “second wave” of globalization—will profoundly re-shape the form and function of U.S. communities in the years ahead. Heightened immigration combined with the aging of the native-born population will dramatically transform the racial and ethnic composition of the population and create demand for a more diverse workforce in all of our social, economic and political institutions. At the same time, the accelerated offshore movement of white collar jobs to other emerging market countries will challenge the ability of U.S. communities to compete for talent and foreign direct investment in the highly volatile and speed driven global economy of the 21st century. This session will provide an overview of these developments and assess the implications and challenges they pose for U.S. communities.

Toward A New Corporate Definition of Pro Bono  
Sammons Wing, Lobby Level, Heritage B

Wendy Spencer, Chief Executive Officer, Governor’s Commission on Volunteerism and Community Service – Volunteer Florida, Tallahassee, FL

In February 2008, 150 top corporate, government and nonprofit leaders met at the Pro Bono Summit to create a new definition for pro bono service that directly addresses nonprofit groups’ most pressing needs, including: financial management, technology, organizational development, communications and marketing, human resource management and fundraising assistance. They also identified the benefit to companies that provide pro bono services and discussed how to expand the pro bono ethic within the corporate community and share best practices. This session, led by a member of the President’s Council on Volunteerism, will focus on the most recent trends and activities in pro bono and skill-based volunteering.
Foundations are sometimes characterized as conservative or neutral agencies that overwhelmingly fund safe, predictable and non-controversial projects and thereby simply maintain the status quo. The potential for foundations to become more actively involved in social transformation is enormous; they are among the few agencies that can fuel transformative efforts quickly and effectively. In this interactive session, we will outline the nature of foundations as transformational leaders, explore the activities of a few foundations that are blazing new trails and discuss the relevance of this direction for your foundation.

**Making Evaluation Work for You and Your Grantees: “So Simple Even a Caveman Can Do It”**

Vanderbilt Wing, Level 8, Grand Ballroom A

Dana Keener, Ph.D., Senior Research Associate, Macro International, Inc., Atlanta, GA

Abraham Wandersman, Ph.D., Professor of Psychology, University of SC, Columbia, SC

Are you looking for ways to make evaluation more realistic and useful for you and your grantees? This session will introduce practical tools and methods—such as the Getting to Outcomes Framework and Empowerment Evaluation—that you can use to make evaluation a more positive and rewarding experience for your grantees. You will learn how to prepare potential grantees for evaluation as part of the grant-writing process so that evaluation can be used to improve programs and to measure achievable outcomes.

**Fatherhood Initiative**

Vanderbilt Wing, Level 8, Taft

Patricia Littlejohn, Interim Executive Director, South Carolina Center for Fathers and Families, Columbia, SC

Dr. Irene Luckey, Research Associate Professor, University of South Carolina Institute for Families in Society, Columbia, SC

Keith Ivey, Site Director, Midlands Fatherhood Coalition (Fairfield), Winnsboro, SC

The Sisters of Charity Foundation of South Carolina launched a comprehensive initiative in 1997 aimed at reducing poverty through father re-engagement. Fatherhood programs are relatively new in the social service arena and funding a fatherhood program is quite different than funding a traditional social service program. Ten years later and with more than $10 million invested, the Foundation has learned significant lessons about implementing and sustaining a comprehensive initiative and fatherhood program best practices. The workshop will highlight: 1) the importance of father involvement; 2) indicators of a potentially successful fatherhood program; fatherhood program best practices, working with low-income men; 3) components of a comprehensive initiative including communications, policy, capacity building and evaluation in addition to funding programs; and 4) challenges and strategies for sustaining an initiative.

**Job Losses: The #1 Issue in the South, as a Transitioning Economy Puts Hundreds of Thousands of Workers at Risk**

Vanderbilt Wing, Level 8, Wilson

Billy Ray Hall, President, North Carolina Rural Economic Development Center, Raleigh, NC

Roger Shackleford, Executive Director, Division of Workforce Development, North Carolina Department of Commerce, Raleigh, NC

Moderator: Joe Crocker, Director of Operations, Z. Smith Reynolds Foundation, Winston-Salem, NC

This session will explore issues related to job loss and economic recovery in Southern communities, with a focus on innovative workforce training/development responses and the special challenges facing rural communities. Roger Shackleford will talk about the challenge of job loss faced in the Southeast and how the federal government and states have responded. Using as an example the massive Pillowtex closure of 2003, during which some 6,000 workers lost jobs nationwide (more than 4,800 in North Carolina), he will talk about both the scale of the problem and the creativity of the coordinated workforce development and human service response made possible by public and private partners. Billy Ray Hall will talk about the shift in the economy related to globalization, technology and other factors and delve into the impacts of job loss.
on rural communities. He will highlight promising practices in retraining and supporting workers who have lost jobs, as well as explaining how philanthropic investments play a critical role in workforce development public policy and program initiatives.

Modern Portfolio Theory Meets Hedge Funds
Vanderbilt Wing, Level 8, Roosevelt

Shane Coldren, CFA, Managing Director, Trusco Capital Management, Atlanta, GA

During the course of the last decade, foundations have increasingly utilized alternative investments, particularly hedge funds, as an important part of their investment strategy. This session will review this important asset class and discuss how the use of hedge funds and other alternative investments have changed our understanding of portfolio theory and construction.

12:15 p.m. – 12:30 p.m.
Break

12:30 p.m. – 1:30 p.m.
Networking Luncheon (Seated by Constituencies)
Vanderbilt Wing, Level 8, Grand Ballroom B&C

1:00 p.m. – 4:30 p.m.
Historic Asheville Area Art and Artists Tour
Tour will depart from the Vanderbilt Wing, Level 7, at 1:00 p.m.

1:30 p.m. – 1:45 p.m.
Break

Concurrent Sessions V
1:45 p.m. – 2:45 p.m.

Another Great Success Story
Sammons Wing, Lobby Level, Heritage A

Douglas B. Ammar, Executive Director, Georgia Justice Project, Atlanta, GA

One of every 100 Americans is now incarcerated. Southern prisons lead the nation in the percentage of their state’s citizens who are imprisoned. More than 60% of these prisoners return to prison after their release. For more than 20 years the Georgia Justice Project has broken this cycle of crime and poverty with dramatic results. This unlikely mix of lawyers, social workers and a landscaping company has found a way to represent people charged with crimes, win or lose, and stand with them as they rebuild their lives. Come hear Doug Ammar, its colorful and inspirational Executive Director, tell the remarkable story of how a dedicated staff, foundation support and committed volunteers are making a profound difference in the lives of their clients.

Economic Update: An Entanglement of Gaps — There’s a Hole in the Bucket
Vanderbilt Wing, Level 8, Grand Ballroom A

Robert “Bob” H. Becker, Ph.D., Director and Professor, Thurmond Institute of Government and Public Affairs, Clemson University, Clemson, SC

The South is often characterized as a lagging region, and the often-used measure of state and US per capita income continues to illustrate a gap that is difficult to close. Dr. Becker will examine the gaps in income, education and spatial comparative advantage and will explore trends for the region. He will illustrate developing patterns and explore the nature of these “gaps” and potential approaches regional enhancement.

2:45 p.m. – 3:00 p.m.
Networking Break

3:00 p.m. – 4:00 p.m.
Film Festival
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
“Crossroads” 27 minutes

Concurrent Sessions VI
3:00 p.m. – 4:00 p.m.

Family Foundations Legal Update
Vanderbilt Wing, Level 8, Eisenhower

Ben White, Alston & Bird, LLP, Atlanta, GA

Promising Practices in Action
Vanderbilt Wing, Level 8, Hoover

Danielle Breslin, Vice President of Operations, Blue Cross and Blue Shield of North Carolina Foundation, Durham, NC

Join your corporate grantmaking colleagues for an interactive continuation of last year’s successful introduction of the Promising Practices framework. Review what makes a “promising practice,” hear exciting success stories and share your own promising practice. This session is sure to change the way you think about your work and its impact and about how you can replicate your success.
What Difference Do We Make? Two Models for Long-Term Evaluation
Vanderbilt Wing, Level 8, Grand Ballroom A

Susan Jenkins, Executive Director, Cherokee Preservation Foundation, Cherokee, NC
Stephanie K. Cooper-Lewter, Director of Research and Evaluation, Healthy Learners, Columbia, SC

Foundations are in the business of supporting change on issues that impact our communities, but how do we know if we are making a difference? We will discuss how both funders and grant recipients feel about the value of long-term evaluation, the process of developing a long-term evaluation plan and the challenges and opportunities that long-term evaluation can offer.

Best Practices in Nonprofit Capacity Building
Vanderbilt Wing, Level 8, Wilson

Atiba Mbiwan, Associate Director, Zeist Foundation, Atlanta, GA
Marty Sonenshine, Executive Director, Anverse, Inc., Cartersville, GA
Jan Honeycutt Lightner, Program Officer, Care Foundation, Northwest Arkansas Community Foundation, Springdale, AR

What is capacity building and what’s all the hype about? Numerous funders have undertaken efforts to strengthen organizations through capacity-building activities. This session will examine the various elements of capacity building and review lessons learned from endeavors of other grantees. Session participants will be given in-depth information about two very different programs that have achieved success in their capacity-building work: Anverse, Inc.’s multi-tenant nonprofit center in Westminster, Maryland and Care Foundation’s program that tailors services to meet the specific needs of the local nonprofit sector in Northwest Arkansas.

Beyond Land Trusts and Lawsuits: How Market-Based Strategies Improve Environmental Stewardship
Vanderbilt Wing, Level 8, Roosevelt

Sid Cullipher, Executive Director, Dogwood Alliance, Asheville, NC

A market-based strategy for land conservation and stewardship is one of the most powerful and least familiar strategies for people who are concerned with the protection of land, water, air quality and forests in the Southeast. However, this strategy is bringing corporations, consumers and conservationists together to achieve remarkable results. By creating demand in the marketplace for environmental stewardship and persuading large companies to turn away from practices that destroy nature, grassroots organizations like Dogwood Alliance have driven the “green” concept into the economic mainstream. Dogwood Alliance Executive Director, Sid Cullipher, will explain the basics of the strategy and share inspiring examples of how a specific market-based campaign led to the conservation of more than 125,000 acres of forestland on the Southeastern Cumberland Plateau.

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Sammons Wing, Lobby Level, Laurel

Nancy E. Jones, President & CEO, Community Foundation in Abilene, Abilene, TX

A two-part session that will focus on the developmental cycle of community foundations and examine the characteristics and metrics required for growth and advancement. The discussion will consider such issues as how to staff ahead of the curve, how to build discretionary endowment and when it is appropriate to tap reserves. These sessions will provide a road map of many ways community foundations can “pass go” and collect their rewards.

4:00 p.m. – 4:15 p.m.
Networking Break

4:15 p.m. – 5:30 p.m.
Site Visit: A Collaborative Asheville — Revitalization Tour of Downtown Asheville, NC
Transportation provided. Visit departs from the Vanderbilt Wing, Level 7, at 4:15 p.m.

Sam Powers, Director, Office of Economic Development for the City of Asheville, NC

Baby Boomers and Millenials sip coffee side-by-side in a pocket park on Lexington Avenue... street musicians greet the crowd spilling out of a sold-out show at Thomas Wolfe Auditorium... camera-toting tourists and tattoo-sporting locals pack Pritchard Park during the Friday night drum circle...

Join us for a walking tour of downtown Asheville — the subject of much acclaim because of its successful downtown revitalization strategies. Explore the vibrant sense of urbanism that occurs when public investment, private development, civic involvement and philanthropy combine forces.
It’s no secret that Americans are facing a serious health care crisis. With the number of uninsured rising, it’s imperative that we look at creative ways to best serve this segment. Learn how two organizations are tackling health care issues through different programs that provide health care access to families and individuals in their communities.

**Early Childhood Development Using the Nurse-Family Partnership Model**

Vanderbilt Wing, Level 8, Eisenhower

Rhett Mabry, Director, Child Care Section, The Duke Endowment, Charlotte, NC

Veronica Creech, Southeast Region Program Developer, Nurse Family Partnership, Wilson, NC

Allen Smart, MPH, FACHE, Senior Program Officer, Kate B. Reynolds Charitable Trust, Winston-Salem, NC

The session will describe the Nurse-Family Partnership program and its social, economic and educational benefit. The participants will also discuss the process in which they have been engaged to bring the program to the Carolinas.

**Investing in Rural Communities Through Entrepreneurship**

Vanderbilt Wing, Level 8, Wilson

Nell Leatherwood, Executive Director, Sequoyah Fund, Cherokee, NC

Greg Walker-Wilson, CEO, Mountain Biz Works, Asheville, NC

Gloria Rattler, Director, Cherokee Business Development, Cherokee, NC

Moderator: Susan Jenkins, Executive Director, Cherokee Preservation Foundation, Cherokee, NC

Interested in making a real difference in your local rural community? This panel discussion will explore how three organizations in Western North Carolina bolster their local economy via entrepreneurial support. It can work in your community too!

**Rural Assets at Work: Success Stories From East Tennessee**

Vanderbilt Wing, Level 8, Roosevelt

Terry Holley, Senior Vice President for Programs & Regional Development, East Tennessee Foundation, Knoxville, TN

Rural asset building is a long-term process that requires many skills from grantmakers. The rewards, though, can be overwhelmingly positive and lasting. Veteran rural funder Terry Holley will share the inspiration, challenges, failures and successes from two East Tennessee communities with very different ideas and approaches: Coker Creek and Greeneville. With the assistance of the East Tennessee Foundation, these two communities have transformed themselves and their outlook. Don’t miss this moving and energizing session.

**Staying Ahead of the Growth Curve: Inventing Community Foundations for the 21st Century and Beyond — Part II**

Sammons Wing, Lobby Level, Laurel

Nancy E. Jones, President & CEO, Community Foundation in Abilene, Abilene, TX

Part two of this two part offering that focuses on the developmental cycle of community foundations and examines the characteristics and metrics required
for growth and advancement. The discussion will consider issues such as how to staff ahead of the curve, how to build discretionary endowment and when it is appropriate to tap reserves. These sessions will provide a road map of many ways community foundations can “pass go” and collect their rewards.

5:30 p.m. – 6:15 p.m.
Welcome Reception for Michael R. Howland, CAE, SECF President and CEO
Sammons Wing, Lobby Level, Heritage Ballroom
Sponsor: The Frist Foundation

6:30 p.m. – 8:00 p.m.
Begin departures for Biltmore Candlelight Tours or Dinner at Deerpark Restaurant followed by Biltmore Candlelight Tours
Tours depart from the Vanderbilt Wing, Level 7, at 6:30 p.m.
OR
Dinner on Your Own
Note: The Blue Ridge Dining Room at The Grove Park Inn will be serving a Holiday Dinner Buffet, $41.51 inclusive of tax and gratuity. Please call Reservations at 828-252-2711, ext. 1010 or dial ext. 7085 from your hotel room.

Friday, November 14

7:00 a.m. – 8:00 a.m.
Breakfast Buffet
Vanderbilt Wing, Level 8, Grand Ballroom B&C
Sponsor: Hollingsworth Funds

7:30 a.m. – 10:45 a.m.
Registration & Information
Vanderbilt Wing Registration Desk, Level 8

Cyber Café & Resource Center
Vanderbilt Wing, Level 8, Coolidge D
Sponsor: Foundation Source Charitable Foundation

Film Festival
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation (Screenings start at 9:30 a.m.)

8:00 a.m. – 8:15 a.m.
Break

Concurrent Sessions VIII
8:15 a.m. – 9:15 a.m.

Collaborating for Impact: Lessons Learned from Western North Carolina’s Mountain Landscape Initiative
Vanderbilt Wing, Level 8, Grand Ballroom A

Susan Jenkins, Executive Director, Cherokee Preservation Foundation, Cherokee, NC
Vicki Greene, Assistant Director, Southwest Commission, Sylva, NC

Bob Wagner, Vice President, The Community Foundation of Western North Carolina, Asheville, NC

Foundations, local government, business and nonprofits have teamed up to address the most controversial and pressing issue in Western North Carolina – land use. Learn the keys of how this collaborative came together and worked – as well as the shortcomings – and how these lessons can apply to critical issues in your community.

Access to Higher Education – Middle Class Squeeze
Vanderbilt Wing, Level 8, Grand Ballroom C

Raymond Owens, III, Vice President and Senior Economist, Federal Reserve Bank of Richmond, Richmond, VA

Keith Roots, Director of Corporate & Foundation Relations, University of Virginia, Charlottesville, VA

Is the sky-rocketing cost of higher education prohibiting access to the middle class because they don’t have enough money to pay for the rising prices but earn too much to get a lot of financial aid? Can we guarantee access to higher education for future generations?

9:15 a.m. – 9:30 a.m.
Break

9:30 a.m. – 11:00 a.m.
Film Festival
Vanderbilt Wing, Level 8, Coolidge E
Sponsor: Lifeworks Foundation
“I.O.U.S.A.” 85 minutes
Southeastern Council of Foundations 2008 Annual Meeting

Concurrent Sessions IX
9:30 a.m. – 10:45 a.m.

Legislative Update
Vanderbilt Wing, Level 8, Grand Ballroom A

Mason Rummel, Chair, SECF Legislative Committee, and Executive Director, James Graham Brown Foundation, Louisville, KY

Luis Maldonado, Director of Government Relations and Public Policy, Council on Foundations, Washington, DC

Mike Howland, CAE, President & CEO, SECF Atlanta, GA

With a new administration and Congress set to take the stage, there are many challenges facing the nation: record foreclosures, the failure of major financial institutions, plummeting home values and a roller-coaster stock market. Grantmakers no doubt will be called to be part of the solution. This session will provide the latest information from Washington and the SECF Legislative Committee, and provide members an opportunity to help shape SECF’s 2009 legislative agenda.

The Greening of the Corporation: How the Environment is Changing Company Programs and Philanthropy
Vanderbilt Wing, Level 8, Grand Ballroom C

Daria Milburn, Vice President, Environmental Affairs, Wachovia Corporation, Charlotte, NC

During the last two years, the media has paid a great deal of attention to companies’ environmental initiatives, but what does it really mean to “green” your corporation? This session will focus on the different programs – from facilities management to philanthropy – being implemented to address environmental stewardship.

Intergenerational Focus on Grant-making: From a Senior Engagement Prospective
Vanderbilt Wing, Level 8, Eisenhower

Donna Butts, Executive Director, Generations United, Washington, DC

Stacey Easterling, Programme Executive, The Atlantic Philanthropies, New York, NY

Learn how grantmaking can remove generational boundaries through integrating program activities, how drawing upon the wisdom of seniors and empowering them and how utilizing the resources of the older population can benefit all communities.

Community Foundations: The Best Partners In Town
Vanderbilt Wing, Level 8, Roosevelt

Lesley Grady, Vice President, Community Foundation for Greater Atlanta, Atlanta, GA

Pat Smith, President, Community Foundation of Western North Carolina, Asheville, NC

Holly Welch Stubbing, Senior Vice President, Client Services, Foundation for the Carolinas, Charlotte, NC

Moderator:
C. Dennis Riggs, President & CEO, Community Foundation of Louisville, Louisville, KY

Learn how community foundations partner with an array of community leaders to foster improved outcomes. Community foundation representatives will share how relationships with public and private funders, nonprofit organizations, Chambers of Commerce, universities and other institutional partners leverage assets, address donors’ passions, build discretionary funds, increase civic engagement and add value to community programs and services.

10:45 a.m. – 11:00 a.m.
Break

Closing Plenary
11:00 a.m. – 12:00 noon
Vanderbilt Wing, Level 8, Grand Ballroom A

Sponsors: Sisters of Charity Foundation of South Carolina and Jesse Parker Williams Foundation

The Changing Face of America: Priorities with the New Administration

Juan Williams, National Political Correspondent and Author, Newton, MA

How does the recent election affect philanthropy and foundation grantmaking in America? What role do the election and current trends play in our nation with respect to foundations efforts to respond to challenges or support changes? As a senior correspondent for National Public Radio, a political analyst for Fox Television and a regular panelist for FoxNews Sunday, Juan Williams will share a political “insider’s” view of what the future may hold.

12:00 noon – 1:00 p.m.
Box Lunch and Departure
Vanderbilt Wing, Level 8, Grand Ballroom B&C
SAVE THE DATE  •  SECF 2009 Annual Meeting  •  November 11-13, 2009  •  The Peabody Hotel  •  Memphis, TN

Grove Park Inn Meeting Rooms

Sammons Wing Lobby Level Meeting Rooms
- Heritage Ballroom
- Dogwood Suite
- Laurel Suite
- Rhododendron Suites

Vanderbilt Wing Level 8 Meeting Rooms
- Coolidge
- Eisenhower
- Hoover
- Roosevelt
- Taft
- Wilson
- The Grand Ballroom