

KING BAUDOIN FOUNDATION UNITED STATES (KBFUS)

'Factors Critical to Success in Fundraising and Development - The American Model'
Study Visit for Senior Professionals of European Universities and Cultural Institutions

New York, April 18 to 21, 2010

Funded through the generous support of:



DRAFT PROGRAM

Day 1 - Welcome (Sunday April 18, 2010)

15.30 sharp	Meeting in the Lobby of The Shoreham Hotel, 33 West 55th Street	Shoreham Hotel
15.30 – 16.30	Welcome, Introductions & Presentations	Shoreham Hotel
17.00 – 18.00	Guided Tour of the Whitney Museum of American Art	Whitney Museum
18.00 – 19.30	Welcome Reception with <u>Adam D. Weinberg</u> , Director, Whitney Museum of American Art	Whitney Museum

Day 2 (Monday April 19, 2010)

8.15 – 8.30	Welcome and Study Visit Overview	KBFUS office
	<u>Jean Paul Warmoes</u> , Executive Secretary, King Baudouin Foundation United States (KBFUS)	
8.30 – 9.45	An Introduction to 'The American Art of Fundraising'	KBFUS office
	<u>Naomi Levine</u> , Chair & Executive Director, Center for Philanthropy and Fundraising; Special Advisor to the President, New York University	
9.45 – 10.45	Meet the Philanthropist	KBFUS office
	<u>Daniel Rose</u> , Philanthropist, Chairman of Rose Associates	
10.45 – 11.00	Break	
11.00 – 12.00	Strategic Planning and its Relationship to Fundraising Success	KBFUS office
	<u>Reynold Levy</u> , President, Lincoln Center for the Performing Arts	
12.30 – 14.00	Lunch	Morrell, 1 Rockefeller Plaza
14.15 – 15.30	Factors Critical to Success in Capital Campaigns	KBFUS office
	<u>Michael Margitich</u> , Senior Deputy Director for External Affairs, The Museum of Modern Art (MoMA)	
15.30 – 16.45	Major Gift Cultivation and Solicitation	KBFUS office
	<u>Janet L. Schinderman</u> , Consultant, former Associate Dean for Special Projects at Columbia Business School	
19.00 – 21.00	Dinner hosted by <u>Ambassador Herman Portocarero</u> , Consul General of Belgium in New York	820 Fifth Avenue
	With Remarks by <u>Lee C. Bollinger</u> , President, Columbia University	

Day 3 (Tuesday April 20, 2010)

8.00 – 8.15	Welcome and Announcements	KBFUS office
8.15 – 9.30 / C	Prospect Identification & Research in the Cultural Institution Environment	KBFUS office, Room 1
	<u>Christopher J. Hughes</u> , Deputy Chief Development Officer for Prospect Research & Strategic Planning, Metropolitan Museum of Art	
8.15 – 9.30 / U	Prospect Identification & Alumni Giving in the University Environment	KBFUS office, Room 2
	<u>David Shanton</u> , Executive Director of Development, Baruch College	
9.30 – 10.30 / C	Building the Donor Base through Membership	KBFUS office, Room 1
	<u>Amanda J. Nelson</u> , Deputy Director of Development, Alvin Ailey American Dance Theater	
9.30 – 10.30 / U	Alumni Cultivation in the University Environment	KBFUS office, Room 2
	<u>Janet B. Rossbach</u> , Director External Relations and Development, Columbia Business School	
10.30 – 10.45	Break	
10.45 – 12.00	Case Study: A Closer Look at The New Museum	KBFUS office
	<u>Lisa Phillips</u> , Toby Devan Lewis Director, The New Museum	
	<u>Addie Nelson Backlund</u> , Principal, Addie Nelson Backlund Consulting, LLC	
12.00 – 13.00	Partnering with Corporations	KBFUS office
	<u>Timothy J. McClimon</u> , Vice President Corporate Social Responsibility, American Express and President, American Express Foundation	
	<u>Chris Park</u> , President, New York Life Foundation and Vice President, New York Life Insurance Company	
	Free Afternoon	
19.00 – 21.00	An Evening at Jazz at Lincoln Center	Jazz at Lincoln Center

Day 4 (Wednesday April 21, 2010)

8.00 – 8.15	Welcome and Announcements	KBFUS office
8.15 – 9.15	An Introduction to Planned Giving	KBFUS office
	<u>Emmett Watson</u> , Director of Planned Giving, The Museum of Modern Art (MoMA)	
	<u>Sonja A. Carter</u> , Associate Director of Gift Planning, Columbia University	
9.15 – 10.15	Tax-Efficient Giving: The U.S. Fiscal System	KBFUS office
	<u>Victoria B. Bjorklund</u> , Head of the Exempt Organizations Group and Partner, Simpson Thacher Bartlett LLP	
10.15 – 10.30	Break	
10.30 – 11.45	Fundraising in the U.S. as a Complement to Efforts Developed at Home	KBFUS office
	<u>Michael G. Cunningham</u> , Director, University of Oxford North American Office	
	<u>Sue Devine</u> , Executive Director, American Friends of the Louvre	
	<u>Hélène Sostarich-Barsamian</u> , former Executive Director, Friends of Freie Universitat Berlin	
11.45 – 12.30	Applying Lessons Learned to Europe & Concluding Remarks	KBFUS office
	<u>Jean Paul Warmoes</u> , Executive Secretary, King Baudouin Foundation United States	
12.45 – 14.15	Farewell Lunch	Brasserie Ruhlmann, 45 Rockefeller