



**After the Global Financial Crisis:
Assessing the impact and where do we go from here?
A Foundation Investment Forum**

London ■ Wednesday, October 28, 2009



AGENDA

8:00-8:30 AM	Registration	
8:30-9:00 AM	Welcome & Morning Energizer	Michelle Baldwin Executive Director, Pillar Nonprofit Network
9:00-10:00 AM	Policy Guidance and Other Priorities at the Charities Directorate: Fundraising and More	Neil Cochrane Manager, Strategic & Legislative Policy Section The Charities Directorate
10:00-10:30 AM	Break	
10:30-11:30 AM	Assessing Risk & Risk Budgeting	Rob Jackson Chief Risk Officer, Highstreet Asset Management
11:30 AM-12:00 PM	Lunch	
12:00-1:00 PM	Luncheon keynote address: Active citizenship and the role of social innovation in creating resilient and vibrant communities	<i>Introduction:</i> Chisanga Puta-Chekwe , Deputy Minister, Ministry of Citizenship & Immigration <i>Speaker:</i> Alan Broadbent , Chairman Avana Capital Corporation/The Maytree Foundation
1:00-2:00 PM	A Year in Review: An Update on Recent Survey Results & Economic Scenario Planning (ESP) from CF Insights & FSG Social Impact Advisors	Melissa Scott Program Manager, Community Foundation Insights
2:00-3:00 PM	A Year in Review	<i>Moderator:</i> Lina Bowden , SVP, AGF Investments <i>Panel:</i> Cathy Yanosik , VP Operations, York University Foundation Frank Pyka , Executive Director, Foundation Western Melissa Scott , Program Manager, CF Insights Rob Jackson , Highstreet Asset Management
3:00-4:00 PM	Wrap-Up & Reception	

Foundation Investment Forum *Presenters:*

Alan Broadbent

Alan Broadbent is Chairman and CEO of the Avana Capital Corporation, and Chairman of the Maytree Foundation. In support of its investment activities, Avana initiates and funds civic engagement projects to strengthen the public discourse on civil society, including: the Jane Jacobs Prize, which celebrates “unsung heroes” in the Toronto Region; the Institute for Municipal Finance and Governance at the Munk Centre, University of Toronto; and Ideas That Matter, an organization to convene discourse on progressive ideas concerning the public good. Alan is also Chairman of several related organizations, including the Caledon Institute of Social Policy (co-founded by Maytree in 1992), Tamarack - An Institute for Community Engagement (co-founded in 2001), and Diaspora Dialogues, which supports the creation and presentation of new writing that reflects the diversity of Toronto.

Alan is also Chairman of the Tides Canada Foundation; advisor to the Literary Review of Canada; Co-Chair of Happy Planet Foods; Member of the Governors’ Council of the Toronto Public Library Foundation; Senior Fellow of Massey College, and Member of the Order of Canada and recipient of the Queen’s Jubilee Medal. He is the author of the recently published book, *Urban Nation: Why We Need to Give Power Back to the Cities to Make Canada Strong*.

Michelle Baldwin

Michelle Baldwin is the Executive Director of Pillar Nonprofit Network. Prior to her position as executive director, Michelle was a founding board member of Pillar Nonprofit Network.

Michelle has extensive experience in volunteer management, communications, training and fundraising through previous positions including Communications & Development Officer for Brain Tumour Foundation of Canada, Coordinator of Volunteer Services for Thames Valley Children’s Centre, working on the Board for London and Area Association of Volunteer Administration, VIP Sponsorship Committee member for Canada 2001 Games, and committee member for the Ontario Network for the Canadian Volunteerism Initiative.

Michelle recently completed her Masters in Educational Psychology with a focus on the enablers and barriers of the Ontario community involvement program for youth with disabilities. She holds a Bachelor of Arts (Honours) in Psychology, Communications & Public Relations Professional Certificate from Continuing Studies at Western and a Volunteer Management Certificate from Fanshawe College. She has also facilitated a variety of nonprofit related workshops.

Neil Cochrane

Neil Cochrane is the Manager of the Common Law Policy Section of the Charities Directorate at the Canada Revenue Agency. A career public servant, his experience includes many years working in both operations and policy development with the department of Citizenship and Immigration as well as assignments overseas with the department of Foreign Affairs.

In 2005, Neil joined the CRA’s Charities Directorate as the Manager of Public Education and External Relations. He currently manages the Section responsible for developing policies and guidance relating to the common law interpretation of charity.

Rob Jackson

Rob Jackson, MMath, is Chief Risk Officer with Highstreet. Together with Highstreet's Chief Investment Officer, Rob leads the investment team. He has overall accountability for Highstreet's risk management processes. Rob is also the portfolio leader for our Canadian dividend and balanced mandates. Rob has been with Highstreet since the firm's inception and has played a key role in the development of our proprietary models and risk management processes. He has 13 years of investment and risk management experience. Prior to joining Highstreet, Rob was a risk manager with a large financial institution.

Chisanga Puta-Chekwe

Chisanga Puta-Chekwe, is Deputy Minister of the Ministry of Citizenship and Immigration and the Deputy Minister Responsible for Women's Issues.

DM Puta-Chekwe was previously Chair of the Social Benefits Tribunal. He spent 2008 in Zambia on a leave of absence from the OPS, working as Country Manager for First Quantum Minerals, with responsibilities for government liaison, negotiations and policy development.

In 1998, he became the founding Chair and CEO of the Ontario Rental Housing Tribunal. His experience also includes several senior positions with Canadian and international organizations, including the Ontario Criminal Injuries Compensation Board, Meridien International Bank, England, and the law firm of Lloyd Jones & Collins, Zambia.

DM Puta-Chekwe studied law at the University of Birmingham in England. A Rhodes scholar, he received a Master of Law degree from the University of London, and B.A. and M.A. degrees in philosophy, politics and economics from the University of Oxford.

Melissa Scott

Melissa Scott is Program Manager for CF Insights, an organization aimed at enabling community foundations to make more informed decisions about operating models in order to achieve greater sustainability and community impact.

Melissa works across all of CF Insights' services including its membership, cost-revenue consulting engagements and research for the field. She provides training and guidance to members for CF Insights' online benchmarking database as well as has conducted cost-revenue analysis for foundations with assets ranging from \$40M to over \$1B. She co-authored CF Insights' recent research reports "Making Informed Decisions in Uncertain Times" (October 2008) and "Taking Informed Action in Challenging Times" (June 2009). She also helped develop CF Insights' new Economic Scenario Planning (ESP) Model, which allows foundations to build five-year forecast scenarios based on changes to factors such as market performance, donor behavior and operating budgets.

Melissa holds an M.S. in Marketing Analytics and a B.S. in Marketing, both from Bentley College in Boston.

Lina Bowden

For Londoners, Lina is best known for her tenure with Highstreet Asset Management. Lina joined Highstreet in 1998 when the firm was formed, providing leadership in a variety of functions including marketing, client service and operations. She is no stranger to Highstreet's foundation clients, as Lina was the key relationship manager for these clients since inception of the firm until the spring of 2009. Lina continues to be a friend and fan of Highstreet and the Highstreet team. Lina Bowden is currently an acting SVP, Product Management & Development with AGF Investments.

Lina has been a committed volunteer and advocate for social justice. Over the years she has been an active volunteer with London Community Foundation, Fanshawe College, Heart-Links and a number of community-based as well as international development organizations. Lina has set an exceptional precedent for philanthropy and community involvement.

Cathy Yanosik

Cathy Yanosik is Vice President, Operations of the York University Foundation and is responsible for annual fundraising programs and marketing, donor stewardship, finance and endowment management. Cathy acts as Secretary to the York University Foundation Board of Directors and is Chair of the Foundation's Pension Committee.

Previously, Cathy held senior advancement roles at the University of Toronto and Queen's University building innovative systems, teams and practices to raise funds in support of teaching and research. Cathy is the recipient of the 2009 Manulife Financial Outstanding Achievement Award from the Canadian Council for the Advancement of Education (CCAEE).

Frank Pyka

Frank Pyka, CMA, is the Executive Director for Foundation Western and a part-time instructor for the University of Western Ontario Continuing Studies in the area of not-for-profit management. Prior to joining Foundation Western, Frank served as the Director of Finance at London Community Foundation and a consultant to Community Foundations of Canada on finance and regulatory matters.

Frank serves on the Board of Conservatory Canada, a national charity promoting achievement in music through a comprehensive program of study, evaluation and recognition for teachers and students.

About Pillar Nonprofit Network

Pillar Nonprofit Network is a voice for the nonprofit sector and supports nonprofit organizations in fulfilling their missions in our community. We provide leadership, advocacy and support to the nonprofit sector through the promotion of volunteerism, professional development, networking, and information. Pillar Nonprofit Network has over 175 member organizations representing the areas of environment, health, education & research, social services, culture & recreation, development & housing, advocacy, religion, and philanthropic intermediaries.

About Highstreet Asset Management Inc.

Founded in 1998, Highstreet Asset Management Inc. is an investment advisor firm with headquarters in London, Ontario. Our clients are families, foundations, pension plans and corporate investors. As well, Highstreet provides investment management services through our sub-advisory relationships and structured products.