

2003 Conference
September 29 & 30, 2003
Otesaga Resort
Cooperstown, NY



c/o Rochester Grantmakers Forum
919 Winton Road South
Rochester, NY 14618

Building a Philanthropic Community

Strengthening and promoting grantmaking in our region.

2003 Conference Theme

What is a philanthropic community? As many of us have learned, effective community investment requires the cooperation of disparate components of our economic and social life. Serious change comes through the collaboration of nonprofit service providers, government, business, civic organizations, special interest groups and private funders. The annual Funders Alliance conference brings together individuals from these sectors to discuss current issues and to engage funders from around Upstate New York in those discussions.

In an era fraught with corporate dishonesty, ethical dilemmas and a moribund economy, grantmakers' practices are also coming under the public eye. Those who know what you stand for and recognize the good you do are likely to support you in tough times. By working closely with all sectors of your community, by forming effective local, regional and national partnerships, you create a climate of trust and respect.

Building a Philanthropic Community has been planned to give you the opportunity to exchange views on these subjects with national and regional experts and to gain insight into your organization's place in that community. We hope that this year's meeting will provide you with tools and information to increase your effectiveness and will help you build a philanthropic community where you live and work.

Funders Alliance of Upstate New York 2003 Conference Committee

Anne Tobey, Chair

The John R. Oishei Foundation (Buffalo)

Mary Eberl

Western New York Grantmakers Association (Buffalo)

Kathy Goldfarb

The Rosamond Gifford Charitable Corporation (Syracuse)

Janet Schumacher

Griffith McLouth Foundation (Rochester)

Elizabeth Wilder

Rochester Grantmakers Forum (Rochester)

Maureen Yee

Grantmakers Alliance of Northeastern New York (Albany)

Building A Philanthropic Community

2003 Conference Schedule of Events

Monday, September 29

Pre-Conference Grantmaker Education Workshops

(an additional fee of \$30 for each session is required, lunch will be included)

Experts in the field will lead each session. You may choose one session during each time slot.

8:00-9:30 am	Interpreting Nonprofit Financials Legal & Ethical Responsibilities of Investing in Community Reviewing Proposals & Conducting Site Visits
10:00-11:30 pm	Evaluation Legal & Ethical Responsibilities of Investing in Community Reviewing Proposals & Conducting Site Visits
Noon-1:30	Lunch
1:30-3:00 pm	Evaluation Interpreting Nonprofit Financials

2:00-4:30 pm **Community Foundations Meeting**

5:30-7:00 pm **Reception at the Fenimore Art Museum**

Network and build relationships with other Upstate New York Funders. Guests of conference attendees are welcome (see registration form for more information).

7:00 pm **Dinner at The Farmers Museum - “Congress, The IRS, and Philanthropy”**
David Cay Johnston, Pulitzer Prize-winning New York Times writer

Tuesday, September 30

7:00 am **Breakfast - “Birds of a Feather”** Discussions focused on foundation management and governance.

9:00 am **Key Note Speaker: Nan Aron, President, Alliance for Justice**

10:35 am **Concurrent Sessions** (Choose one of these three sessions facilitated by experts in the field.)
Early Childhood Development; Grantmaking for the Aging; Public Policy “What Can We Do?”

Noon **Lunch with Guest Speaker, William Josephson, Attorney General in Charge, New York State Charities Bureau**

1:35 pm **Concurrent Sessions** (Choose one of these three sessions facilitated by experts in the field.)
Building Community: Investing in Community Development; Funding the Arts;
New York State Census

3:00 pm **Plenary Session - “The State of Upstate”** New research by the Brookings Institution

4:30 pm **Adjourn**

Don't miss this valuable opportunity for funders throughout Upstate New York to come together and share their grantmaking experiences and focus on the regional grantmaking environment!

Register now for the Funders Alliance of Upstate New York 2003 Conference.

Who can come...

All conference participants must be members or eligible for membership in the Funders Alliance of Upstate New York.

Membership is open to grantmaking foundations, corporate giving programs and corporate foundations, government agencies, and public charity grantmakers like United Way, arts councils, Junior League, religious organizations, etc. Funders must annually support more than one nonprofit organization or collaborative in Upstate New York.

Members of the Funders Alliance of Upstate New York and its member organizations will receive a discount. Members of the Grantmakers Alliance of Northeastern New York, Rochester Grantmakers Forum or Western New York Grantmakers Association are also members of the Funders Alliance of Upstate New York.

To register...

Please return the conference registration form along with a check or money order made payable to **Rochester Grantmakers Forum** as soon as possible. The registration deadline is September 15, 2003. Take advantage of our discounted rate by registering on or before August 15, 2003.

Full conference registration requires a Monday night stay (September 29) at the Otesaga Hotel Resort. Partial conference registration is available for commuters at a day rate or for those staying at other locations in the Cooperstown area.

Payment...

We request that payment be sent with your registration form by September 15, 2003. We can only accept checks or money orders made payable to **Rochester Grantmakers Forum**. (Sorry, we cannot accept credit cards.)

Confirmation...

Once you register for the conference, you will receive a confirmation via email or fax securing your place in the conference. If you do not receive a confirmation, please call 585.232.2380 or email michelle.yale@grantmakers.org.

Cancellation Policy...

To ensure a refund, the Funders Alliance of Upstate New York must be notified in writing of your cancellation prior to 5:00pm (est) on Wednesday, September 20, 2003. Please email your cancellation to michelle.yale@grantmakers.org or fax it to 585.232.8413.

Hotel reservation information...

To book overnight accommodations at the Otesaga Hotel Resort, you must complete a separate reservation form. To request a form, please call or email our office (585.232.2380, register@grantmakers.org).

What to pack...

Pack your bags with business casual attire for all conference events - plus leisure clothes, golf gear and swim suits if you plan to take advantage of the sporting and site-seeing activities in Cooperstown. None of the sessions require formal business attire.

Getting there by car...

The Otesaga Hotel Resort is located at 60 Lake Street, Cooperstown, NY, overlooking Lake Otsego.

From the West (Buffalo/Syracuse)

Take Exit 30 off of the New York State Thruway (I-90) at Herkimer and take Route 28 South to Cooperstown. After entering the village, turn left onto Chestnut Street. Follow Chestnut Street through the stoplight to Lake Street. Turn left at Lake Street. The hotel is located on the right overlooking Lake Otsego.

From the East (Albany & NYC)

Take the New York State Thruway (I-90) to Exit 29 at Canajoharie, take Route 10 South to Route 20 West to Route 80 South into Cooperstown OR take the Thruway (I-90) to Exit 25A and I-88 to Exit 24 (Duanesburg) then Routes 20 and 80 to Cooperstown. After entering the village, The Otesaga is on the left, just past the golf course on Lake Street.

From the South (Binghamton/Oneonta)

Take I-88 East to Oneonta, Exit 17 to Route 28 North to Cooperstown. After entering the village follow Chestnut Street through the stoplight to Lake Street. Turn left onto Lake Street. The Otesaga is located on the right overlooking Lake Otsego.

Questions...

Visit www.grantmakers.org for regular updates about the agenda, speakers, location and other aspects of **Building a Philanthropic Community**.

You may also call 585.232.2380 or email us at FundersUpstate@grantmakers.org for more information.

Building A Philanthropic Community

2003 Conference Registration

Registration Deadline: September 15, 2003

Early Bird: August 15, 2003

(Please copy this form for each additional registrant)

Please Note: **Conference registration and hotel reservation fees are separate.** Accommodations at the Otesaga Hotel Resort must be reserved with a separate form. For full conference registration, please call or email our office to request a hotel reservation form to return directly to the Otesaga (585.232.2380, register@grantmakers.org).

For conference registration, complete this form and return it with your check or money order to:

Rochester Grantmakers Forum
919 Winton Road South, Rochester, NY 14618.

Registrant Information

(Please Print)

I AM A MEMBER OF:

- Funders Alliance of Upstate New York
- Grantmakers Alliance of Northeastern New York
- Rochester Grantmakers Forum
- Western New York Grantmakers
- None of the above

Complete Name

Title

Name Tag (Name as you would like it to appear on your name tag.)

Organization

Street Address

City, State Zip

Telephone

Fax

Email Address

Website Address

Special Needs (disability, dietary restrictions, or other)

Guest's Name (if registering for the Monday night reception)

Community Foundations Meeting

- Yes, I plan to attend the special meeting for Community Foundations.

Pre-Conference Grantmaker Education Workshops

- Reviewing Proposals & Conducting Site Visits** \$30
- Interpreting Nonprofit Financials** \$30
- Legal & Ethical Responsibilities** \$30
- Evaluation** \$30

Pre-Conference Total \$ _____

(Total from above)

Full Conference

Must include a Monday night stay (September 29) at the Otesaga Resort Hotel. Fee includes Fenimore Art Museum & The Farmers Museum reception and dinner.

Early Bird Rate

(if postmarked by August 15)

	Members	Nonmembers
Early Bird Rate	\$95	\$145

Basic Rate

(if postmarked after August 15)

Basic Rate	\$125	\$175
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Full Conference Total \$ _____

(Total from above)

Partial Conference

Rates below are for participants *not* staying at the Otesaga Hotel Resort. Fee includes lunch. (Members do not receive discounts for partial registration.)

Tuesday, Sept. 30 - Early Bird Rate

(if postmarked by August 15)

\$75/day

Tuesday, Sept. 30 - Single Day Rate

(if postmarked after August 15)

\$100/day

Ticket for Reception & Dinner at

Fenimore Art Museum & The Farmers Museum

(Guests of conference attendees may attend for \$60 each)

\$60x _____

Partial Conference Total \$ _____

(Total from above)