



SCHWAB FOUNDATION FOR **SOCIAL ENTREPRENEURSHIP**

THE VOICE OF SOCIAL INNOVATION

SEVENTH SOCIAL ENTREPRENEURS SUMMIT *Social Entrepreneurship: Connecting Markets and Meaning*

20-22 January, 2008
Rüschlikon, Switzerland

PROGRAM

Objectives

20 January: *(The day is reserved for Social Entrepreneurs. Other participants are welcome on January 21-22nd)*

- To continue to build the community of accomplished social entrepreneurs by creating opportunities where they learn from one another and identify areas where mutual collaboration can increase the effectiveness of their respective efforts.

21-22 January:

- To create a dynamic exchange among participants and social entrepreneurs around key local, national and global challenges where both contribute to the discussion drawing upon their expertise.
- To provide a platform where social entrepreneurs can hear from resource providers (business, foundations, universities, academia and media) about their respective missions and interests with a view of identifying areas of collaboration.

Saturday, 19 January

18:30 – 21:00 **Welcome Cocktail** - for Social Entrepreneurs

*Swiss Re Centre
for Global
Dialogue
- Foyer*

Sunday, 20 January

9:00 – 9:10

Opening
Welcome

*Swiss Re Centre
for Global
Dialogue
- Forum A+B*

- **Pamela Hartigan**, Managing Director, Schwab Foundation for Social Entrepreneurship

9:10 – 9:50

Plenary Session
Introduction of New Community Members

Social Entrepreneurs that were selected as “Social Entrepreneur of the Year” throughout 2007 are presented according to the area in which they work

Moderated by

- **Pamela Hartigan**

9:50 – 11:00

Discussion groups
Introducing and Reconnecting

Incoming community members (2006-2007) will be partnered with more “seasoned” members (2001-2005) in groups of 10. Social entrepreneurs will present themselves along the following lines (see template provided):

- Mission and Activities of the Organization
- Geographical Regions in which organization operates
- Number of beneficiaries directly impacted by actions
- Business model
- Annual budget
- Percentage of annual revenues that comes from earned income
- Most important achievement(s)
- Biggest hurdle
- Plans in the coming 3 years

Each group will have a moderator charged with ensuring that each member gets equal time.

11:00-11:30

Contact Break
Networking

11:30 – 12:30

Discussion groups
“Mirror, Mirror on the Wall”: The Perils of Self-Deception

Discussion Topic: How well do you know the market you are in? Who are your competitors? What makes your contribution unique, transformational and important? Would you ever merge with another like-minded organization that was doing a great job? Why or why not?

Method: Same groups with a moderator

12:30 – 14:00

Lunch

- 14:00-14:30 Plenary Session
Introduction of New Community Members
- Social Entrepreneurs that were selected as “Social Entrepreneur of the Year” throughout 2007 are presented according to the area in which they work
- 14:30-15:30 Discussion groups
Afternoon Theme: Balancing Management Needs, Money Needs and My Own
- Backdrop: For social entrepreneurs, managing multiple and varied demands is an on-going and unique process, similar yet different from the demands faced by mainstream small, medium and large business enterprises. Group discussions will revolve around sharing with one another, how each entrepreneur and his/her organization are balancing – or not - these different aspects
- Discussion groups
Managing Internal and External Needs
- Questions to be examined include:
- Strategies for protecting the enterprise from dependence on the leader/founder
 - Experiences and frustrations with recruiting top talent: the market gap and how my organization addresses it through other incentives.
 - Staff assessment strategies and policies, implementing “exit” strategies (i.e. firing); protecting staff from “burn out”
 - Strategies for building a top team and lessons learned; handling volunteers
 - The fleeting dream of having a great Board – and taking their advice
 - How exposed is my organization to political risk? If it gets government funding, or if it depends on government policy for an enabling environment, how prepared is it if the support decreases or ceases?
 - How exposed is my organization to reputational risk? How do we ensure against threats in to our credibility?
- Method: Each group will have a pre-assigned moderator to ensure all have an opportunity to participate.
- 15:30 – 16:00 Contact Break
Networking
- 16:00 – 17:00 Discussion groups
Managing Financial Needs
- Some questions to be examined include:
- Is my organization dependent on one single investor/donor, or does it have diverse revenue streams? If the former, what has prevented us from diversifying the funding base?
 - What percentage of time does my organization spend on mobilizing investment, including identifying sources, writing proposals and chasing funders/investors?
 - How big a source of funding is government? What are the ups and downs of government funding in comparison to other sources?
 - How close has my organization been to “meltdown” and what is its strategy to ensure we never get there again?
 - How do we manage financial growth?
 - Have we ever turned down a contributor, and why?
- 17:00 – 18:00 Discussion groups
**Balancing Passion and Achievement Drive with the Rest of your Life:
How Well are You Doing?**
- Method: Prior to this session, social entrepreneurs will have completed a confidential survey, the results of which will be compiled and shared to kick start this session.

18:00 – 19:00 **Cocktail**

19:00 – 22:00 **Dinner**

*Swiss Re Centre
for Global
Dialogue
- Dining Room*

Introduction

- **Klaus and Hilde Schwab**, Co-Founders, Schwab Foundation for Social Entrepreneurship

Monday, 21 January

8:00 – 9:00 **Registration**

9:00 – 9:15 **Welcome**

- **Hilde Schwab**, Chairperson and Co-Founder, Schwab Foundation for Social Entrepreneurship
- **Jacques Aigrain**, Chief Executive Officer, Swiss Reinsurance Company

9:15 – 9:30

Introduction of Schwab Foundation Board Members

Stephen Brenninkmeijer
David Gergen
David Puttnam
Hilde Schwab

Paulo Coelho
Zanele Mbeki
Klaus Schwab
Muhammad Yunus

9:30 – 11:00

Discussion groups

Showcasing entrepreneurial approaches I: Issues

Participants will go to one of the following issue groups. Each group will have a maximum of 12 participants, divided equally among social entrepreneurs working on these issues and interested participants. Each group will have a moderator who will also act as a discussion catalyst.

1. **Sustaining and strengthening rural communities**

Group discussion catalysts/moderators:

Group 1: **Don Mohanlal**, President and Chief Executive Officer, The Nand and Jeet Khemka Foundation

Group 2: **William Kramer**, President, Global Challenge Network

2. **Improving infrastructure for health and access to it**

Group discussion catalysts/moderators:

Group 3: **Sophia Tickell**, Chair, Sustainability

Group 4: **Seth F. Berkley**, Founder, President and Chief Executive Officer, International AIDS Vaccine Initiative

3. **Transforming information and learning systems and practices**

Group discussion catalysts/moderators:

Group 5: **James Tooley**, President, The Education Fund, Orient Global

Group 6: **Deborah Holmes**, Director, Corporate Social Responsibility, Ernst & Young

4. **Revolutionizing financial access and market opportunities**

Group discussion catalysts/moderators:

Group 7: **Peter Blom**, Chief Executive Officer and Chairman of the Board of Management, Triodos Bank Group

Group 8: **Nancy Barry**, President, Enterprise Solutions to Poverty

5. Enabling the “disabled”

Group discussion catalyst/moderator:

Group 9: **Greg Dees**, Professor, Practice of Social Entrepreneurship, Fuqua School of Business, Duke University

6. Preparing young people for full and purposeful employment

Group discussion catalyst/moderator:

Group 10: **Elim Chew**, Founder and President, 77th Street, Singapore

Group 11: **Jamie McAuliffe**, Portfolio Manager, Edna McConnell Clark Foundation

7. Beyond good intentions: Increasing opportunities for women

Group discussion catalyst/moderator:

Group 12: **Sally Osberg**, President and Chief Executive Officer, Skoll Foundation

8. Tackling the multiple facets of urban under- and unemployment

Group discussion catalyst/moderator:

Group 13: **Steve Lawrence**, Founder, WorkVentures Australia

Group 14: **Bella Berns**, Head, Philanthropy, Credit Suisse

9. Catalyzing Civic Engagement for Social Transformation

Group discussion catalyst/moderator:

Group 15: **David Gergen**, Director, Center for Public Leadership, John F. Kennedy School of Government, Harvard University

10. Saving the planet one individual at a time (focus on energy, waste management and water)

Group discussion catalyst/moderator:

Group 16: **Ivo Menzinger**, Managing Director, Risk Management, Swiss Reinsurance Company

Group 17: **Philip Auerswald**, Editor, Innovations Journal

11. Approaches to unleash the power of the conscious consumer

Group discussion catalyst/moderator:

Group 18: **John Elkington**, Founder and Chief Entrepreneur, Sustainability

Group 19: **Barbara Fiorito**, Board Chair, FairTrade Labelling Organizations (FLO)

11:00 – 11:30

Contact Break

Networking

11:30– 13:00

Discussion groups

Showcasing entrepreneurial approaches II: Regions

Asia

Discussion catalysts/moderators:

Group 1: **Uday Khemka**, Vice-Chairman, SUN Group

Group 2: **Giuseppe Nicolosi**, Chief Executive Officer, Ernst & Young

Group 3: **Rob McLean**, Chairman, Social Ventures Australia

Group 4: **Akhtar Badshah**, Senior Director, Microsoft Corporation

Group 5: **Nana Watanabe**, journalist and author on social entrepreneurship

Europe

Discussion catalysts/moderators:

Group 6 : **Youssef Dib**, Global Coordinator, Personal Wealth Management, PNB Paribas Group

Group 7: **Cliff Prior**, Chief Executive Officer, UnLtd

Group 8: **Melchior de Muralt**, Managing Partner, De Pury, Pictet, Turretini & Cie

Group 9: **Ryszard Praszkiel**, Director, Ashoka Poland

Latin America

Discussion Catalysts/moderators:

Group 10: **Ximena Escobar de Nogales**, Acting Director, Center for Applied Studies in International Negotiations (CASIN)

Group 11: **Ricardo Young Silva**, President, Ethos Institute

Group 12: **Brizio Biondi-Morra**, President, AVINA

Group 13: **Roberto Gutierrez**, Associate Professor and Coordinator, Social Enterprise Knowledge Network (SEKN)

Group 14: **Peggy Dulany**, Chair, The Synergos Institute

MENA: Middle East, North Africa and Africa

Discussion Catalysts/moderators:

Group 15: **Fadi Ghandour**, Founder and Chief Executive Officer, Aramex International

Group 16: **Kojo M. Parris**, Director, Social Private Equity South Africa (SPESA)

North America:

Discussion Catalysts/moderators:

Group 17: **David Pecaut**, Senior Partner and Managing Director, The Boston Consulting Group

Group 18: **Marc Benioff**, Chairman and Chief Executive Officer, Salesforce.com

Global: (Social Entrepreneurs working in multiple regions)

Discussion Catalysts/moderators:

Group 19: **Stephen Brenninkmeijer**, Private Investor, Anthos

Group 20: **Johanna Mair**, Professor, IESE Business School

13:00 – 14:30

Lunch

14:30 – 18:00

Discussion groups

Showcasing the Resource Providers - Overview

The afternoon will be an opportunity for business, foundations, universities, academia and media to highlight the work they are doing to support social entrepreneurs, clarifying the types of initiatives in which they are more likely to engage.

Method: Social entrepreneurs and resource providers meet in groups of 15 people. There will be 3 rounds with different group compositions of 60 minutes each.

Resource Providers include

Allianz, AlphaMundi, Ashoka, Avina, Bain & Company, Bamboo Finance, The Boston Consulting Group, BonVenture, Catalyst Fund Management and Research, Children's Investment Fund Foundation, Cisco, Columbia University, Credit Suisse, Deutsche Welle, Duke University, Edna McConnell Clark Foundation, Ernst & Young, Goldman Sachs Foundation, Harvard University, Het Groene Woudt, IESE, INSEAD, John Templeton Foundation, Khemka Foundation, Lex Mundi, LGT Bank, Lombard Odier Darier Hentsch, Microsoft, Mittal Investments UK, Net Impact, Oasis, Permira, PNB Paribas, PricewaterhouseCoopers, Reuters, Salesforce, Skoll Foundation, Stanford University, Synergos, Three Guineas Fund, Triodos, UBS, United Nations Foundation, University of Heidelberg, UnLtd, What if?, WISE and more

14:30 – 15:20

Discussion groups

Showcasing the Resource Providers: Round I

15:30 – 16:20

Discussion groups

Showcasing the Resource Providers: Round II

16:30 – 17:00

Contact Break

Networking

- 17:00 – 18:00 Discussion groups
Showcasing the Resource Providers: Round III
- 18:00 – 19:00 Contact Break
Networking
- 19:00 – 19:30 Cocktail
Announcement of Leapfrog Winners
- Swiss Re Centre
for Global
Dialogue
- Forum A+B*
- Presented by:
- **Peggy Reid**, Director, MBA Programs, Center for Social Innovation, Stanford Graduate School of Business
 - **Pamela Hartigan**, Managing Director, Schwab Foundation for Social Entrepreneurship
- Award Presentation to Global Social Entrepreneurs**
- Presented by:
- **Pamela Hartigan**, Managing Director, Schwab Foundation for Social Entrepreneurship
- 19:30 – 22:00 **Dinner**

Tuesday, 22 January

- 9:00 – 12:00 Sessions in Parallel
Short films on Social Entrepreneurs
- Portraits of eight social entrepreneurs of the Schwab Foundation community filmed by DW are presented.
- Taffy Adler, Johannesburg Housing Company, South Africa
 - Alvaro Dávila, Fundación Social, Colombia
 - Harish Hande, SELCO, India
 - Andrea Muccioli, San Patrignano Community, Italy
 - Albina Ruíz, Ciudad Saludable, Peru
 - Mechai Viravaidya, PDA, Thailand
 - Rose Volz-Schmidt, Wellcome, Germany
 - Mel Young, Homeless World Cup, United Kingdom
- 9:00 -11:00 **“Facebook Off-line”: Connecting YOU with the people you want to meet**
- Method: Based on the previous day’s opportunities for discussion, this two hour time slot is for pursuing further meetings between people you want to talk to one-on-one. Each participant will have a “Facebook Off-Line” sign-up card divided into 15 minute time slots. Participants should start arranging meetings with those they wish to talk to as soon as they have determined who those people are. Length and location of meetings are determined by both parties.
- A bell will be sounded at the end of each 15 minute period.
- 11:00 – 12:00 **Got a Topic you want to discuss with a group? Plan it, post it, do it**
- Method: Whereas the previous session was for one-on-one discussions, this hour provides a chance for group gatherings on a specific topic of interest to more than one person. Topics are compiled according to responses to a survey sent to all participants.

12:00 – 12:30	Plenary Session The Story Teller: Paulo Coelho
12:30 – 14:00	Farewell Lunch
14:00 – 15:00	Davos Briefing Session for Social Entrepreneurs attending the Annual Meeting in Davos
14:30 – 18:30	City Tour - sponsored by AlphaMundi Group
<i>Swiss Re Centre for Global Dialogue - Main Entrance</i>	Optional – sign up required