



Association of Small Foundations

ATLANTA REGIONAL PROGRAM

December 3

NEW! Legal Essentials
Nonprofit Assessment Tools

December 4

NEW! The Best of ASF

December 5

Investment Essentials
Investments: Beyond the Basics



Register online at
www.smallfoundations.org/Events!

WEDNESDAY, DECEMBER 3

Legal Essentials *New!*

9:00 a.m. – 4:30 p.m.

Can we do that? Find out what the attorneys know! Learn the basic legal requirements of private foundations in an interactive and engaging format.

Who should attend?

Donors, trustees, and staff seeking a practical understanding of the basic legal requirements and best practices for private foundations.

Schedule

9:00 a.m.	<i>Welcome & Introductions</i>
9:15 a.m.	<i>Foundations from a Legal Perspective</i>
10:45 a.m.	<i>Board Responsibilities & the Private Foundation Rules</i>
12:15 p.m.	Lunch
1:30 p.m.	<i>Putting the Private Foundation Rules into Practice</i>
2:45 p.m.	<i>A Stroll through the Grantmaking Cycle</i>
4:00 p.m.	<i>Tying It All Together</i>
4:30 p.m.	Adjourn

*Session times and topics are subject to change.

Nonprofit Assessment Tools

9:00 a.m. – 4:30 p.m.

Delve deeper into grantmaking by honing your critical questioning skills and equipping yourself with several frameworks for assessing a grantee's potential to meet its mission effectively.

Who should attend?

Donors, trustees, and staff who want to learn which questions to ask prospective grantees and what to do with the answers.

Schedule

9:00 a.m.	<i>Welcome & Introductions</i>
9:15 a.m.	<i>Lifecycle Analysis of a Nonprofit Organization</i>
10:45 a.m.	<i>Financial Detective, Part I</i>
12:15 p.m.	Lunch
1:30 p.m.	<i>Financial Detective, Part II</i>
2:45 p.m.	<i>Bet on Leadership: Strengthening Nonprofit Leaders</i>
4:15 p.m.	<i>Tying It All Together</i>
4:30 p.m.	Adjourn

*Session times and topics are subject to change.

6:30 p.m. Networking Dinner *Mark your calendar!*

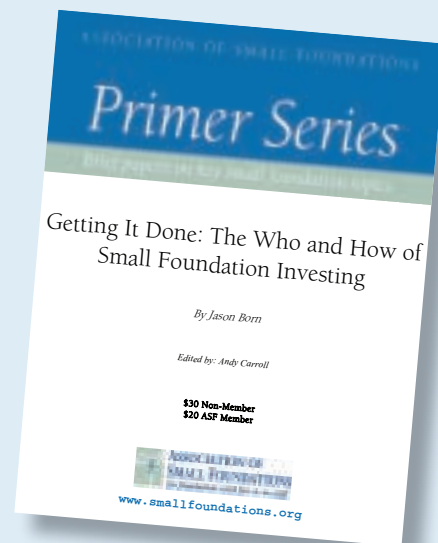
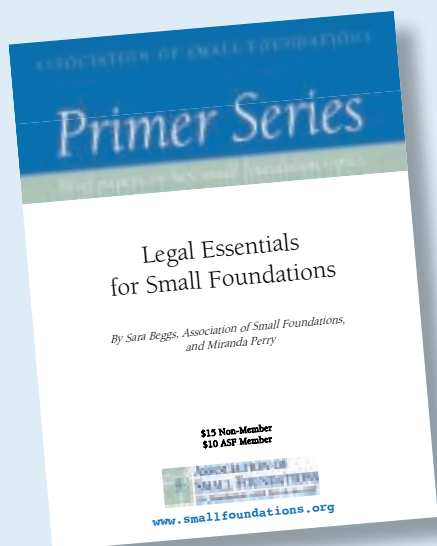
Gather with attendees for an evening of great food and informal networking, sponsored by SunTrust Bank. Details will be sent to registrants prior to the event.

Looking for more?

ASF Primers research, sift, and summarize the best information for you – in just 10-20 pages. Titles include:

- Legal Essentials for Small Foundations
- Getting It Done: The Who and How of Small Foundation Investing
- Creating a Strategy and Plan for Your Foundation's Investing: Developing and Using an Investment Policy Statement
- And dozens more!

Order your copies at www.smallfoundations.org/Primers.



THURSDAY, DECEMBER 4



The Best of ASF *New!*

9:00 a.m. – 4:30 p.m.

Packed with a diverse sampling of our most popular educational sessions, *The Best of ASF* lets you choose among a variety of topics. The result? A day of learning customized to your needs and interests.

Who should attend?

Donors, trustees, and staff who are beginner or advanced grantmakers, as well as those somewhere in between!

Schedule

- | | |
|------------|-------------------------------------------------------------------------------------------------------------------------|
| 9:00 a.m. | Welcome Breakfast |
| 10:15 a.m. | Session Options
<i>Put Your Assets Where Your Mission Is
From Vision & Mission to Strategy & Tactics</i> |
| 11:45 a.m. | Plenary Lunch |
| 1:15 p.m. | Session Options
<i>Understanding Family Dynamics
Running the Small Foundation Office</i> |
| 3:00 p.m. | Session Options
<i>Small Assets, Big Impact
Strengthening Early Childhood Literacy</i> |
| 4:30 p.m. | Adjourn |

**Session times and topics are subject to change.*

4:30 – 6:30 p.m. Networking Reception

Unwind over food, drinks, and mingling with fellow participants, ASF board members and staff, program sponsors, and local co-host SECF.



Not an ASF member?

Join now and receive an additional \$100 discount on your total registration fee for the Atlanta Regional Program – a \$200 savings from the non-member rate! For details, contact Karen Engstrom at 888-212-9922 or karen@smallfoundations.org.

FRIDAY, DECEMBER 5

Investment Essentials

9:00 a.m. – 4:30 p.m.

Are you losing money without knowing it? Learn how to assess what's important, why it's important, and strategies to maximize your investment returns.

Who should attend?

Donors, trustees, and staff who are less experienced than they would like to be with investment terminology, concepts, and policies.

Schedule

9:00 a.m.	<i>Welcome & Introductions</i>
9:15 a.m.	<i>Building a Portfolio: Asset Allocation & Risk</i>
11:00 a.m.	<i>The Foundation's Investment Policy: Why You Need It</i>
12:15 p.m.	Lunch
1:45 p.m.	<i>Who Does the Work? Roles & Responsibilities of Consultants, Advisors, Managers, Board & Committees</i>
3:15 p.m.	<i>Reading Investment Statements & Understanding Fees</i>
4:15 p.m.	<i>Tying It All Together</i>
4:30 p.m.	Adjourn

**Session times and topics are subject to change.*



Investments: Beyond the Basics

9:00 a.m. – 4:30 p.m.

How is your foundation doing in terms of investment returns, processes, and governance? Pinpoint at least one area where you can save or make money.

Who should attend?

Donors, trustees, and staff who are involved in portfolio management or familiar with basic concepts of investing and want to learn more.

Schedule

9:00 a.m.	<i>Welcome & Introductions</i>
9:15 a.m.	<i>Where Is the Market Heading? A Global Perspective on Investments</i>
10:00 a.m.	<i>How (and When) to Make Effective Board Decisions about Investments</i>
11:00 a.m.	<i>New Perspectives on Risk Management: Theory & Practice</i>
12:15 p.m.	Lunch
1:45 p.m.	<i>Alternatives</i>
3:15 p.m.	<i>Indexing: Using Equity Benchmarks</i>
4:15 p.m.	<i>Tying It All Together</i>
4:30 p.m.	Adjourn

**Session times and topics are subject to change.*

A Special Thank You to Our Premier Program Sponsors



ASF has done an excellent job of creating a friendly, highly interactive environment where learning occurs and relationships are cultivated.

– Leonard Benton, Southwestern Urban Foundation, OK

What will you find at the Atlanta Regional Program?



Real People



Real Lessons



Real Connections



PROGRAM LOCATION

JW Marriott Buckhead Atlanta
3300 Lenox Road
Atlanta, GA 30326
Phone: 404-262-3344 or 800-228-9290

ACCOMMODATIONS

A limited number of rooms are reserved for program participants at the JW Marriott until Wednesday, November 12. Please call the hotel directly to make your reservations and mention *Association of Small Foundations* to receive the special rate of \$199 per night.

REGISTRATION FEES

Members of ASF or Southeastern Council of Foundations

Any One Day: \$250 • Any Two Days: \$450 • All Three Days: \$550

Non-Members

Any One Day: \$350 • Any Two Days: \$550 • All Three Days: \$650

Not an ASF member?

See inside to learn about a special benefit for joining now!



Thank you to Southeastern Council of Foundations (SECF), our local co-host. Members of SECF receive the discounted member rate when registering for this program.

Save the Date!

2009 ASF Educational Programs

Late Winter Seminars

Scottsdale, AZ • March 12-13, 2009

Spring Seminars + Next Generation Retreat

San Diego, CA • April 19-22, 2009

Investing in Strategies to Support At-Risk Youth

Durham, NC • Spring 2009

Multi-Family Retreat

Lakeville, CT • July 31-August 2, 2009

Fall Seminars + Sole Staff Retreat

Boston, MA • October 26-29, 2009

International Donor Trip

Fall 2009



Visit www.smallfoundations.org/Events for the latest updates and details on program offerings.

The Association of Small Foundations (ASF) is a membership organization of more than 3,000 foundations with few or no staff. ASF enhances the power of small foundation giving by providing the donors, trustees, and staff of member foundations with peer learning opportunities, targeted tools and resources, and a collective voice in and beyond the philanthropic community.



1720 N Street NW
Washington, DC 20036

Non Profit
U.S. Postage
PAID
Suburban Maryland
Permit No. 2295

**Hotel deadline for
Atlanta Regional Program
is November 12!**

Association of Small Foundations

PROGRAM REGISTRATION

December 3-5, 2008 • Atlanta, GA

For quick and easy online registration, visit www.smallfoundations.org/Events!

WHO SHOULD ATTEND? Each seminar is open exclusively to foundation trustees and staff. Please see www.smallfoundations.org/Events for attendee guidelines.

REGISTRATION FEES

Members of ASF or Southeastern Council of Foundations

Any One Day: \$250 • Any Two Days: \$450 • All Three Days: \$550

Non-Members

Any One Day: \$350 • Any Two Days: \$550 • All Three Days: \$650

Or join now and pay only \$450 for three days!

ATTENDEE REGISTRATION

FULL NAME MR. MS. _____

NAME FOR BADGE _____

TITLE _____

FOUNDATION _____

EMAIL _____

MAILING ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ FAX _____

Please check your membership:

- Association of Small Foundations (ASF)
- Southeastern Council of Foundations (SECF)
- Non-Member

Please check ONE program for each day you will attend:

WEDNESDAY, DECEMBER 3

- Legal Essentials*
- Nonprofit Assessment Tools*

THURSDAY, DECEMBER 4

- The Best of ASF*

FRIDAY, DECEMBER 5

- Investment Essentials*
- Investments: Beyond the Basics*

PHOTO RELEASE

ASF will, from time to time, use photographs/video of program attendees in its promotional materials. All attendees of ASF events acknowledge that they may be photographed/ videotaped by ASF or its official photographer/videographer while at the event and that the photographs/video may be used in future print and electronic promotional materials. If you do not wish your likeness to be used in this way, please contact asf@smallfoundations.org or (888) 212-9922 within 48 hours of conclusion of the event.

Please see www.smallfoundations.org/Events for attendance policies.

Association of Small Foundations

PROGRAM REGISTRATION

December 3-5, 2008 • Atlanta, GA

PAYMENT INFORMATION

Total Due \$ _____

MasterCard Visa American Express Check Enclosed (payable to ASF)

CREDIT CARD NUMBER _____

EXPIRATION DATE _____ BILLING ZIP CODE _____

NAME ON CARD _____

SIGNATURE _____

CANCELLATION POLICY

Refunds will be issued for cancellations made before November 12, 2008.
Substitutions will be accepted at any time.

ADDITIONAL INFORMATION

Please answer the following questions to help us better prepare our trainers.

What is your role in the foundation?

- Trustee/Board Member Donor
 Staff Family Member Advisor
 Other: _____

Length of time in foundation work?

- 0-2 years 3-5 years 6-10 years 11+ years

Foundation type:

- Family Independent Corporate
 Community Other _____

Asset size of your foundation?

- Less than \$2 million \$2-\$10 million
 \$10-\$40 million More than \$40 million

Year foundation was established: _____

Please submit a separate registration form for each participant
by fax to **202-580-6579** or by mail to:

Association of Small Foundations
ATTN: Atlanta Regional Program
1720 N Street NW, Washington, DC 20036

Save time by registering online at
www.smallfoundations.org/Events.
