



## Harvard Business School Club of Philadelphia Officers, 2011-2012

### Officers

|                |                                  |
|----------------|----------------------------------|
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| Rodney Comegys | Vice President                   |
| Andrew Strauss | Programs                         |
| Ryan Buck      | Strategic Planning and Alliances |
| Nate Niles     | Treasurer and Controller         |

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| Mark Dickerson       | Marketing                    |
| Tony Sanchez         | Membership                   |
| Lorin Decker         | Networking                   |
| Vivek Kumar          | Opening Event                |
| Stephanie Parker     | Opening Event                |
| Chris Moye           | Presidents Breakfast Club    |
| Jim Weisberg         | Presidents Breakfast Club    |
| Sandra Yeager        | Private Equity               |
| Bob Welzel           | Resources Roundtable         |
| Nate Niles           | Second Tuesday's             |
| Diane Cutler         | Social Enterprise Initiative |
| Shane Campbell       | Special Programs             |
| Tim McDermott        | Special Programs             |
| Sheila O'Shaughnessy | Website Administrator        |
| Courtney Fretz       | Young Alumni                 |

## 2011 Social Enterprise Initiative Planning Committee

|                     |                      |                  |
|---------------------|----------------------|------------------|
| Joan Abrams         | Nimrit Kang          | Maria Stefan     |
| Mitch Collins       | Michael Lawson       | David Simms      |
| Rodney Comegys      | R. Kimball Leiser    | Andrew Strauss   |
| Zoe Coulson         | Asuka Nakahara       | Ralph K. Tang    |
| Diane Cutler, Chair | Nate Niles           | Warren Tranquada |
| Michael Glessner    | Sheila O'Shaughnessy | Bob Welzel       |
| Martin Hunt         | David Othmer         | Michael Wong     |
| Jun Huangpu         | Robert Pavan         | Deneen Williams  |



## **“Unlocking the Potential of Your Board”**

### **2011 CONFERENCE AGENDA**

WHYY Dorrance H. Hamilton Public Media Commons  
150 North 6<sup>th</sup> Street, Philadelphia, PA

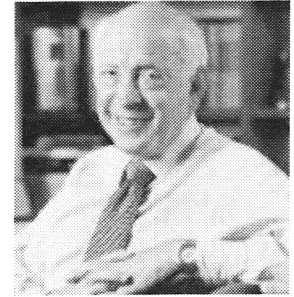
Tuesday – November 15, 2011

|               |  |
|---------------|--|
| 8:30 – 9:00   | Registration and Continental Breakfast   |
| 9:00 – 9:15   | Welcome & Introductions  |
| 9:15 – 11:00  | Case Study – <i>The American National Red Cross (A)</i><br><br>Case Discussion: Professor Jay W. Lorsch<br>Louis Kirstein Professor of Human Relations, Harvard Business School  |
| 11:00 – 11:15 | Break  |
| 11:15 – 12:00 | Panel Discussion: “Philadelphia Nonprofit Leaders Share HBS Lessons Learned and Implemented”<br><br>William Clark, President & Executive Director, Philadabundance<br>Sarah Martinez-Helfman, Executive Director, Eagles Youth Partnership<br>Kim Sajet, President & CEO, Historical Society of Philadelphia |
| 12:00 – 1:00  | Lunch  |
| 1:00 – 1:45   | Keynote Speaker: David L. Cohen, Esquire<br>Executive Vice President, Comcast Corporation  |
| 1:45 – 2:00   | Break  |
| 2:00 – 3:00   | Summary of Case Study Themes, Questions & Answers: Professor Lorsch  |
| 3:00 – 3:15   | Concluding Remarks & Adjournment   |



## Professor Jay W. Lorsch

Jay W. Lorsch is the Louis Kirstein Professor of Human Relations at the Harvard Business School. He is the author of over a dozen books, the most recent of which are Back to the Drawing Board: Designing Boards for a Complex World (with Colin B. Carter, 2003), Aligning the Stars: How to Succeed When Professionals Drive Results (with Thomas J. Tierney, 2002), and Pawns or Potentates: The Reality of America's Corporate Boards (1989). Organization and Environment (with Paul R. Lawrence) won the Academy of Management's Best Management Book of the Year Award and the James A. Hamilton Book Award of the College of Hospital Administrators in 1969.



Having taught in all of Harvard Business School's educational programs, he was Chairman of the Doctoral Programs, Senior Associate Dean and Chair of the Executive Education Programs from 1991-1995, Senior Associate Dean and Director of Research from 1986-1991, Chairman of the Advanced Management Programs from 1980-1985, and prior to that was Chairman of the Organizational Behavior Unit. He is currently Chairman of the Harvard Business School Global Corporate Governance Initiative and Faculty Chairman of the Executive Education Corporate Governance Series. As a consultant, he has had as clients such diverse companies as Applied Materials, Berkshire Partners, Biogen Idec, Citicorp, Cleary Gottlieb, Steen & Hamilton LLP, Deloitte Touche, DLA Piper Rudnick, Goldman Sachs, Kellwood Company, MassMutual Financial Group, Tyco International, Shire Pharmaceuticals and Sullivan & Cromwell LLC. He is a member of the Sony Ericsson WTA Tour Global Advisory Council, the board directors of New Sector Alliance as well as The Antioch Review National Advisory Board. He formerly served on the boards of Benckiser (now Reckitt Benckiser), Blasland Bouck & Lee Inc., Brunswick Corporation, Sandy Corporation and CA, Inc.; he also served on the Advisory Board of U.S. Foodservice.

He is a graduate of Antioch College (1955) with a M.S. degree in Business from Columbia University (1956) and a Doctor of Business Administration from Harvard Business School (1964). At Columbia, he was a Samuel Bronfman Fellow in Democratic Business Administration. From 1956-59, he served as a Lieutenant in the U.S. Army Finance Corps.

Professor Lorsch is a Fellow of the American Academy of Arts & Sciences.



## Keynote Speaker - David L. Cohen

David L. Cohen is Executive Vice President of Comcast Corporation, one of the world's leading media, entertainment and communication companies and is the majority owner and manager of NBC Universal. Mr. Cohen has a broad portfolio of responsibilities, including corporate communications, government affairs, public affairs, corporate administration, and serves as senior counselor to the CEO. Before assuming this position in July of 2002, Mr. Cohen served as a partner in and Chairman of Ballard Spahr Andrews & Ingersoll, LLP, one of the 100 largest law firms in the country.



A native of New York, Mr. Cohen graduated from Swarthmore College in 1977 with a BA and with a JD from the University of Pennsylvania Law School (*summa cum laude*) in 1981. From January 1992 to April 1997, Mr. Cohen served as Chief of Staff to the Honorable Edward G. Rendell, the Mayor of the City of Philadelphia. As detailed in the book *A Prayer for the City*, written by Pulitzer-Prize winning author Buzz Bissinger, Mr. Cohen played a critical coordinating role in significant budgetary and financial issues, in economic development activities, in collective bargaining negotiations, and in a wide variety of other policy and operational issues relating to the city.

Mr. Cohen serves as Chairman of the Trustees of the University of Pennsylvania and its Executive Committee. Mr. Cohen also serves as a member of the Trustee Board and the Executive Committee of Penn Medicine (an umbrella governance structure overseeing both the University of Pennsylvania Health System and the University's School of Medicine). In addition, Mr. Cohen serves on both the Board of Directors and the Executive Committee of the Greater Philadelphia Chamber of Commerce, which he formerly chaired, and is a member of the CEO Council for Growth. Mr. Cohen serves as a national trustee of City Year and is Chair of the Governance Committee and a member of the Executive Committee. He also serves on the national board of the National Urban League and as a member of the Corporate Advisory Board of the National Council of La Raza. Mr. Cohen is a former Chair of the United Way of Southeastern Pennsylvania, former Co-Chair of the 2003 Resource Development Campaign for the United Way of Southeastern Pennsylvania, former Chair of the Southeastern Pennsylvania Chapter of the American Red Cross, former Co-Chair of Philadelphia 2000, the Host Committee for the 2000 Republican National Convention, former Co-Chair of the Host Committee for the National Conference of Volunteerism and Service, and former Vice Chair of the Board of Directors of the Jewish Federation of Greater Philadelphia.

Mr. Cohen has received numerous awards for his civic and charitable activities, including the Americanism Award of the Anti-Defamation League (1993), the Philadelphia Commission on Human Relations Clarence Farmer Service Award (1997), the Community Legal Services Champions Award (1997), the Philadelphia Bar Medal (1979), the Variety Club Gold Heart Humanitarian Award (1998), the Philadelphia Hospitality Vision for Philadelphia Award (1999), the American Red Cross Citizen of the Year Award (1999), the Police Athletic League Award (2001), the United Way's Citizen Volunteer of the Year Award (2002), the City Year Philadelphia Lifetime of Idealism Award (2004), National Cable Television Association, Vanguard Award for Leadership and Impact in the Cable Industry (2005), the American Red Cross Celebration of Volunteers Award (2006), the Association of Cable Communicators President's Award (2007), the President's Volunteer Service Award (2007), the MS Society Hope Award (2007), the Drexel Business Leader of the Year Award (2008), the National Urban League of Philadelphia Business Leader of the Year Award (2008), the Philadelphia Business Journal Minority Business Leader Award (2009), and the Annual Northwest Philadelphia Community Appreciation Awards Trailblazing Footsteps Award (2009). Mr. Cohen also was awarded an Honorary Doctor of Laws degree from Drexel University in 1997 and a Honorary Doctor of Law degree from Rider University in 2010.

Mr. Cohen, 56, lives in Philadelphia with his wife and their two sons.





**SPNM Fellowship Recipients (2001- 2011)**

|      |   |
|------|---|
| 2001 | Jim Balfanz, City Year Greater Philadelphia                           |
| 2002 | Janice Price, Kimmel Center   |
| 2003 | Miguel Angel Corzo, University of the Arts                            |
| 2003 | Gail Harrity, Philadelphia Museum of Arts                             |
| 2004 | Derek Gillman, Pennsylvania Academy of Fine Arts                      |
| 2005 | Alba Martinez, United Way of Southeastern Pennsylvania                |
| 2005 | Sharmain Matlock-Turner, Greater Philadelphia Urban Affairs Coalition |
| 2005 | Jane Pepper, Pennsylvania Horticultural Society                       |
| 2006 | Laura Shubilla, Philadelphia Youth Network                            |
| 2006 | Patricia Coulter, Urban League of Philadelphia                        |
| 2007 | Yael Lehmann, The Food Trust  |
| 2007 | Nicholas Torres, Congreso de Latinos Unidos                           |
| 2008 | William Clark, Philabundance  |
| 2008 | JoAnne Fischer, Maternity Care Coalition                              |
| 2009 | Gwendolyn Bailey, Youth Services Inc.                                 |
| 2009 | Jay Spector, JEVS Human Services                                      |
| 2010 | Jane Golden, City of Philadelphia Mural Arts Program                  |
| 2010 | Linda Katz, Children's Literacy Initiative                            |
| 2011 | Sarah Martinez-Helfman, Eagles Youth Partnership                      |
| 2011 | Kim Sajet, Pennsylvania Historical Society                            |



### About the Harvard Business School Club of Philadelphia

The Harvard Business School Club of Philadelphia is one of the oldest HBS alumni clubs in the world. Founded in the early 1920s, the Club serves over 1,000 alumni in the Delaware Valley, including the metropolitan areas of Philadelphia, PA, Camden, NJ and Wilmington, DE. The club provides educational, social and business networking events for alumni and also maintains and enhances communication between local alumni and the Harvard Business School.

An overarching goal of the Club is to contribute to the well being of the community. To fulfill this goal, in 1992 the Club launched the Social Enterprise Initiative (SEI) to help the nonprofit organizations of our area. The Club recognizes that nonprofit organizations and their management greatly enhance the quality of life and vibrancy of the Delaware Valley, and increase the value of our communities and environment. But too often, these organizations lack the resources to develop their management talent, and many nonprofit executives come from backgrounds other than business. There is also growing realization that changing operating environments and mounting financial pressures are testing the skills of our nonprofit leaders. To address these challenges, the Social Enterprise Initiative focuses on providing executive education opportunities in the areas of finance, operations, marketing and strategy for nonprofit leaders in the Greater Philadelphia Region.

Since 2003, the Social Enterprise Initiative has awarded scholarships to local nonprofit executives to attend the continuing education program offered by the Harvard Business School, Strategic Perspectives in Nonprofit Management (SPNM). To date, 20 nonprofit leaders have attended this intensive six-day program designed to strengthen the capacity of nonprofit CEOs and executive directors to lead their organizations effectively. Recipients to date are listed on the following page.

The Club's Social Enterprise Initiative also offers other local continuing education opportunities for nonprofit leaders. We organize an annual conference which features Harvard Business School and other leading university faculty, along with expert panels, to provide educational sessions aimed at addressing critical challenges facing nonprofit organizations. Some 60 nonprofit leaders attend this conference each year which uses the case study method as a basis for executive learning and engagement. Select club programs during the year are also of interest to the nonprofit community and participants of both SPNM and the SEI conferences are invited to attend as guests of the Club.

The Club's direct tie into the Harvard Business School – one of the world's top business programs – and its alumni, many of whom hold senior positions in major corporations, makes the Initiative a compelling offering for our region's nonprofits and an excellent opportunity for synergy between the for-profit and nonprofit sectors.



## 2011 Conference Funders



Comcast Corporation is one of the nation's leading media, entertainment and communications companies. Comcast is primarily involved in the operation of cable systems through Comcast Cable and in the development, production and distribution of entertainment, news, sports and other content for global audiences through NBCUniversal. Comcast Cable is one of the nation's largest video, high-speed Internet and phone providers to residential and business customers. Comcast is the majority owner and manager of NBCUniversal which owns and operates entertainment and news cable networks, the NBC and Telemundo broadcast networks, local television station groups, television production operations, a major motion picture company and theme parks.

As Comcast has grown, so has its community focus. Comcast established the Comcast Foundation in June 1999, and since then, it has given more than \$77 million to the highest-quality non-profit organizations in Comcast communities nationwide. The Foundation has reached nearly 3,000 organizations in nearly 2,000 communities. Comcast provides financial support to organizations that have a strong presence in our communities and match our dedication to expanding literacy, promoting community service and building tomorrow's leaders. Comcast has also established the Comcast Leaders and Achievers® Scholarship Program for outstanding youth in our communities, recognizing them for achievements by helping them pay for a college education, thereby enabling them to reach their full potential.



A privately held organization, Levenger was the first company in America to sell products specifically with readers in mind. Steve and Lori Leveen, a husband-and-wife team, founded Levenger in 1987.

The company has since evolved into a designer of high-end products geared toward reading, writing and professional pursuits. Its proprietary product line encompasses award-winning note-taking systems, leather goods, writing instruments and products co-branded with leading cultural institutions. Levenger also has its own book publishing arm, Levenger Press, which specializes in collector editions.

Its sales channels include a direct-to-consumer catalog of "Tools for Serious Readers"; its e-commerce sites of Levenger.com and Levengerpress.com; and stores in Boston, Chicago, Boca Raton and the Washington, D.C., area. Its business-to-business arm, Professional & Corporate Sales, reaches customers through both web and catalog presentations. Levenger is headquartered in Delray Beach, Fla. Its customer service and fulfillment centers are in Memphis.



### THE PHILADELPHIA FOUNDATION

*The Power of Endless Possibilities™*

The Philadelphia Foundation has been committed to improving the quality of life in Bucks, Chester, Delaware, Montgomery, and Philadelphia counties for 90 years, through funds established by our donors.

As a public charity community foundation, we manage more than 800 charitable funds, maximizing the strategic impact of charitable contributions.

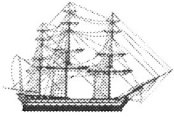
The Philadelphia Foundation's first obligation is to support the intentions of donors who have created funds. Individuals, families, businesses and organizations establish permanent charitable funds that help our region meet the challenges of changing times. We invest and administer these funds and award the distributions as grants and scholarships.

Our work is overseen by a volunteer board of leading citizens and run by professionals with expertise in the region's needs.



**United Way  
of Southeastern Pennsylvania**

United Way of Southeastern Pennsylvania, established in 1921, is one of Greater Philadelphia's largest non-profit organizations and one of approximately 1,400 affiliated United Ways nationwide. Each United Way is independent, separately incorporated, and governed by local volunteers. United Way improves people's lives by mobilizing the caring power of donors, volunteers and communities.



**Vanguard®**

Vanguard is one of the world's largest investment management companies. Headquartered in Malvern, Pennsylvania, Vanguard comprises more than 170 separate domestic investment portfolios, with current U. S. fund assets of approximately \$1.6 trillion. Vanguard's mission is to help clients reach their financial goals by being the world's highest-value provider of investment products and services. Vanguard serves its client in more than 80 countries.

In 1997, the Vanguard Charitable Endowment Program was founded by Vanguard as an independent, tax-exempt public charity designed to increase philanthropy in the United States. Their donor-advised fund provides a simple and effective charitable giving tool – the donor advised account – that individuals and organizations can use to support their favorite charities over the long term.

As of August 2011, Vanguard Charitable has issued more than \$3.1 billion in grants and has received over \$5.0 billion in contributions. Vanguard Charitable has nearly 7,800 active accounts with total assets of more than \$2.2 billion. Vanguard Charitable is ranked among the 25 largest charities in the United States, providing a low-cost, efficient way for donors to make charitable contributions, recommend grants to their favorite charities, and continue their giving activities across generations.



## **Social Enterprise Initiative Past Supporters**

We would also like to thank the terrific institutions that have provided financial support and advice over the history of this initiative:

Citizens Bank  
Drinker Biddle & Reath  
Liberty Property Trust  
Mellon Bank  
Pitney Bowes  
SEI Investments  
William Penn Foundation  
Tiffany & Company  
TL Ventures



# **SAVE THE DATE**

**Wednesday, February 8, 2012  
7:30am – 8:45am**

## **Networking Breakfast**

Diane Cutler, Chair of the Social Enterprise Initiative, will host the 2011 SEI conference participants at a continental breakfast at the Acorn Club. The purpose of our meeting will be to network, discuss goal(s) set in November and/or share progress with the group.

To prepare for this workshop, please be sure to complete the commitment form provided with the Program Notebook at the conclusion of the conference.